

# JA Company Program® Pop-Up



Guide for Volunteers and Teachers



# JA Company Program® Pop-Up

## Guide for Volunteers and Teachers



Copyright ©2020 Junior Achievement USA®

Colorado Springs, Colorado

All rights reserved. Any text of this publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, storing in an information-retrieval system, or otherwise, except in the course of conducting a registered Junior Achievement USA class or with the permission of the publisher.

All Web links in this guide were correct at the time of publication. If a link is found to be no longer active, or has changed, please email [education@ja.org](mailto:education@ja.org) with the words "Link Update" in the subject line. Include the page number on which the link appears in this guide.



# Welcome

Thank you for your commitment to Junior Achievement and entrepreneur education, and welcome to *JA Company Program Pop-Up*. Junior Achievement USA® is a nonprofit organization that has contributed to the entrepreneurship education of more than 100 million young people around the world since its founding in 1919. JA USA is dedicated to inspiring and preparing young people to succeed in a global economy. For more information, please visit <https://www.juniorachievement.org>.

## ACKNOWLEDGMENTS

### Sponsorship

Junior Achievement USA® gratefully acknowledges The Hartford Corporation for its dedication to the development and implementation of the *JA Company Program Pop-Up* program. *JA Company Program Pop-Up* introduces students to the process and skills required to set up, promote, launch, and run a pop-up company experience; they will apply their entrepreneurial mindset and skills through practical application of team collaboration and business planning.

### Junior Achievement Areas

Junior Achievement USA® acknowledges the following JA Area offices for their work as incubator sites in the development of the *JA Company Program Pop-Up*:

- JA of the Chisholm Trail
- JA of Delaware
- JA of Greater St. Louis
- JA of Greater Washington
- JA of Northern New England
- JA of South Florida
- JA of Southeastern Pennsylvania
- JA of the Upper Midwest



# Contents

Foreword.....	1
Guide for Volunteers and Teachers .....	13
Meeting One: Pop-Up Warm-Up .....	13
Meeting Two: Doing the Research .....	30
Meeting Three: Defining the Pop-Up Structure .....	47
Meeting Four: The Ps of Pop-Up .....	64
Meeting Five: Creating the Buzz.....	76
Meeting Six: Open for Business! .....	91
Meeting Seven: Pop-Up Wrap-Up.....	104
Glossary .....	113



# Foreword

By presenting *JA Company Program Pop-Up* to youth, you are joining other teachers and business volunteers in providing middle school and high school students a unique educational experience. This guide provides the resources educators need to implement *JA Company Program Pop-Up* effectively. As you gain experience, you will find ways to adapt the materials and activities to meet the needs of your students more effectively and help them better understand the entrepreneurial, business planning, and operations management skills important to every young person today.

## INTRODUCTION

In *JA Company Program Pop-Up*, students will develop an entrepreneurial mindset and skills they can use in everyday life that will also make them assets to future employers as intrapreneurs. They will gain foundational skills and knowledge needed to plan, promote, launch, and run a business, while exploring roles and responsibilities related to finance, marketing, and sales within a business structure.

*JA Company Program Pop-Up* is a student-driven project experience that tasks students with achieving a profitable business goal to donate proceeds to a charitable cause. Students are exposed to the real-life decision-making experiences of an entrepreneur as they manage logistics to set up and successfully run a product campaign or service-related event.

## PROGRAM GOALS

*JA Company Program Pop-Up* provides opportunities for middle school and high school students to:

- Apply entrepreneurial characteristics to a real-life business experience and set personal growth goals.
- Employ 21st century learning skills like critical thinking, creativity, collaboration, and communication in business planning and operations.
- Explore their “inner entrepreneur” and experiment with processes used in entrepreneurial endeavors.
- Discover mindsets and problem-solving techniques that can be applied to any life experience.



## CONTENT OVERVIEW

*JA Company Program Pop-Up* is made up of seven meetings with additional time for actual running of the pop-up business. Each meeting contains academic, conceptual topics that directly relate to the work students will complete in their pop-up company.

Students explore the foundational elements of planning, setting up, promoting, and running a small business. Learning concepts are mapped directly to the pop-up experience so that students can progress step-by-step through the planning process with the scaffolded supports and prompts of their **Pop-Up Planner** (a student workbook). Students will plan a timeline of milestone tasks and events and the corresponding logistics to ultimately run a profitable business venture and achieve their monetary goal.

### Program Delivery

The program is presented in a blended learning format, which means that there are a variety of materials offered—both digital and printable—for use online and in the classroom. This program includes individual and group hands-on activities, online interactives, and valuable curated media to watch, listen to, and explore. The program's materials are accessed through a digital learning platform online, but the course is designed to be highly flexible to accommodate educator and student needs.

Each meeting includes individual topics that address single learning objectives. This content organization provides flexibility for the instructor to determine the best use of materials based on the class's goals and students' abilities.

The program also uses a central student workbook, called the **Pop-Up Planner**, to guide the students' business planning activities and logistical tasks. This workbook should be distributed and collected for each class meeting if you are in an in-person, face-to-face learning environment. Instruct students to save their **Pop-Up Planners** in a convenient location on their computers to access during each session, if you are in a remote, virtual learning environment.

This program aligns with other programs in the JA Entrepreneurship Pathway. In particular, although not a prerequisite, it will prepare students to make the most of *JA Company Program*, JA's capstone entrepreneurship program, should they choose to pursue it later.

### Implementation Scenarios

The following scenarios illustrate how facilitators can utilize the flexible content and delivery to enable students to complete assignments in their preferred learning style (e.g., online outside of class, in class with peers) and to obtain mastery of concepts and skills through additional time, repeated exposure, and



varying modalities. The examples are provided to spark blended learning ideas. *However, always begin with the end goal in mind and implement the content in the method that will best achieve that end goal.*

## Scenario 1

The meeting is delivered in a **remote, virtual learning environment**. Students access their **Pop-Up Planner** through JA Connect, the JA learning platform, independently in preparation for each session. Instructors open the guide for the session on a tablet while sharing the onscreen presentation on a laptop. Students engage in discussion through the Web-conferencing tool by unmuting their microphones and responding and/or posting in the chat. Students complete and submit any assignments as directed by the instructor.

## Scenario 2

The meeting is delivered **in-person in a face-to-face learning environment**. The instructor distributes the students' **Pop-Up Planners** to use for note taking and activities during class. Instructors lead the meeting and project the onscreen presentation on the classroom smartboard to guide class discussion. Students complete independent and small group activities during class and debrief as a class to discuss their learning. Instructors continue the learning by assigning students to complete the rest of the activity independently outside of class time.

## PROGRAM TERMS (DEFINITIONS AND USE)

*Pop-up business* – The pop-up business is what students will plan, promote, and manage throughout the course of the program.

*Main business goal* – The main business goal of the pop-up business is to make a profit. The exact profit will be determined either prior to the program or during the program with the students.

## PLANNING AND TEACHING JA COMPANY PROGRAM POP-UP

*JA Company Program Pop-Up* is a simplified version of *JA Company Program* to promote interest in entrepreneurship and business planning in younger audiences. This version of the program uses several preset elements that are otherwise determined and handled by students in *JA Company Program*.

Educators will need to establish several preset elements before initiating the program.



## Pop-Up Business Options

The organization or school sponsoring the pop-up experience will select one of the three preset options for a business venture.

Pop-Up Business Options	Examples
Sell merchandise with a design.	<ul style="list-style-type: none"> <li>• A sweatshirt with a student-designed logo to support a fundraiser</li> <li>• School supplies (e.g., notebooks and binders) designed by student artists</li> </ul>
Create, promote, and conduct sales for an event.	<ul style="list-style-type: none"> <li>• Ticket sales for a talent show</li> <li>• Ticket sales and preorders for a book fair</li> </ul>
Run an existing fundraiser.	<ul style="list-style-type: none"> <li>• Bake sale fundraiser for new library books</li> <li>• Coupon book sale fundraiser for new sports equipment</li> </ul>

## Program Options

The school or community organization sponsoring the pop-up experience will need to determine the way in which the program should be implemented. Determination must be made about the level of student involvement in decision making prior to the start of the program. Students can offer input on:

- The business for which students will structure their planning and operations.
- The recipients of the pop-up business's proceeds (the charitable cause).
- The desired monetary goal for the business.



Based on the option selected, the following steps need to be taken before or during the program (depending on the option chosen):

Pop-Up Predetermined by Organization/Lead Instructor	Pop-Up Selected by the Students
Prior to the program, the volunteer or teacher will work with the supporting organization to establish the following preset information and decisions for the pop-up experience. The information will then be shared with students during the program.	During the program, the lead instructor will facilitate discussions with students about selection of and decisions about the following information. The information will be decided upon in class and shared with the school or community organization.
<p><i>Organization/lead instructor will...</i></p> <ul style="list-style-type: none"> <li>• Determine the main business and monetary goal (desired profit amount).</li> <li>• Decide what to do with the proceeds (determine the recipient and how funds will be allocated).</li> <li>• Coordinate the delivery and presentation of the proceeds to the recipient.</li> </ul>	<p><i>Students will...</i></p> <ul style="list-style-type: none"> <li>• Brainstorm business ideas.</li> <li>• Vote on and select a business idea.</li> <li>• Determine the main business goal (profit amount).</li> <li>• Decide what to do with the proceeds.</li> </ul>

## Organizational Responsibilities

Additionally, the school or community organization is responsible for establishing some preset logistics for the success of this program. The entity will need to determine the following in advance:

- Procedures related to handling and managing funds generated through the sales of products/services:
  - Bank account – Set up or use existing account for the business's sales and expenses, based on the organization's established procedures.
  - Start-up funds – Provide cash needed for the launch of the pop-up business.
- Transaction payment types – Determine the acceptable payment types for transactions and provide appropriate resources to accommodate those payment types (e.g., cash box with start-up cash or credit card machine).
- Vendor identification and logistics – For any business that includes merchandise, identify a product or products and establish a vendor relationship for production and delivery.
- Related expenses – Provide funds for expenses related to business setup, promotion, and operations, such as printing, shipping, accessories for store setup, etc.



## PROGRAM MATERIALS

All facilitation and program materials are housed in the JA Connect platform. The following materials are provided for each meeting:

- A comprehensive volunteer and teacher guide for all topics
- An onscreen presentation for each topic for maximum flexibility
- A **Pop-Up Planner** (a comprehensive student workbook)

Facilitators are encouraged to utilize the digital functionality of the materials but are empowered to determine how and where the materials are used as well as their sequence and timing. Materials may be implemented through a blend of digital and print media, and both face-to-face and virtual remote approaches, as needed.

### Material Formats

#### Facilitator Materials

	In Person, Face-to-Face	Remote, Virtual
<b>Guide for Volunteers and Teachers (Printable)</b> Meeting information, setup, and talking points for the facilitator to implement the meeting/program in a printable format	✓	
<b>Guide for Volunteers and Teachers (Digital)</b> Meeting information, setup, and talking points for the facilitator to implement the meeting in digital format - designed for any device and "second screen" use	✓	✓
<b>Onscreen Presentation</b> Instructional content in interactive slides designed for the facilitator to project or share onscreen	✓	✓



## Student Materials

	Multimedia	Downloadable Document	Fillable Document
<b>Pop-Up Planner</b> Digital workbook for students to use to take notes and complete activities		✓	✓
<b>Pop-Up Financials</b> Digital spreadsheet for the student to manage company finances		✓	✓
<b>Sales Tracking</b> Document for students to track sales		✓	✓

## Student Materials Access and Expectations

Student materials may be accessed directly by students through JA Connect, the JA learning platform. Conversely, teachers and volunteers may choose to download student activity pages from JA Connect and share them with students through their usual file-sharing tool or program.

Teachers and volunteers should demonstrate to students how they can access, download, and save their materials.

## Fillable Documents

Students can download, type in, save, and share their **Pop-Up Planner** with their teacher or the JA volunteer. Share the following directions with students on how to use the fillable fields in the **Pop-Up Planner**:

1. Download the document in your personal workspace.
2. Open the document in your document reader (e.g., Chrome Web browser, Adobe Reader).
3. Select an input field (typically a shaded box), and type information in the box.
4. Press Tab (on your keyboard) to accept the input and move to the next field.
5. When you are done filling fields, select the Save icon from the menu bar to save your work. In some Web-based programs where a Save icon is not available, right-click on the document and select Save-As to save your work.



## Virtual Preparation Suggestions

The following best practices for remote virtual learning may be used, as needed, to implement this program:

1. **Use a “second screen” setup.** Use a second device like a tablet or smartphone to view the facilitator guide or to access external tools like polling. The second screen allows you to avoid flipping between windows or browser tabs.
2. **Establish ground rules for class.** Be sure cameras are on, microphones are off to maximize participation and focus.
3. **Prepare your workspace for smooth transitions.** Organize the Web-conferencing tool's windows (e.g., main window, participants, chat) so they work for your facilitation style. Open the curriculum in JA Connect and the onscreen presentation ahead of time for easy access.
4. **Maintain a central location where information is conveyed for assignments, action items to complete before a session, and small group meetings.** Do this in the system established by the school district or create an online collaborative tool, such as a shared Google document.
5. **Utilize the Share functionality in JA Connect.** Consider posting questions for students to discuss in the Share area of the online course.
6. **Use a group text messaging tool.** Send quick reminders outside of class about upcoming sessions and assignments. Tools include:
  - [Classpager](#)
  - [Remind101](#)
  - [ClassParrot](#)
7. **Keep students engaged.** Determine how students will stay engaged with the content while working virtually. Decide which technology tools and strategies (e.g., virtual polls, chat, raise hand icon, paired chat) you will use for students to respond to questions and share ideas throughout the session.
8. **Use breakout rooms.** For student collaboration or small group activities in a virtual setting, use a breakout room feature. Learn how to use your Web-conferencing tool feature ahead of time and practice it in advance for smooth use during sessions. Establish small group assignments ahead of class to make setup easier during the session. As the facilitator, move from group to group virtually to provide support.



## Virtual Tool Ideas

Review the following suggestions for virtual tools to use with students as you implement this program.

### Web-Conferencing Features

All Web-conferencing tools have facilitator controls that you will need to use to turn on and off specific features. Acquaint yourself with the Web-conferencing tool before a session to use the features effectively. Sometimes a simple step like clearing the screen annotation can be confusing if you don't practice ahead of time.

Use the features provided in your Web-conferencing tool. Most software provides similar features such as:

- **Whiteboard:** A white screen is where students can annotate on the screen simultaneously.
- **Chat:** An instant messaging window allows students to type questions or provide input; monitor the chat panel to ensure the quieter students are being “heard” as well.
- **Audience control:** Most tools provide the facilitator with the ability to mute participants or limit chat abilities; use these controls to keep students’ attention focused on the discussion.
- **Recording:** Consider recording a session to provide to students for reference if the tool provides that feature.
- **Nonverbal feedback:** Different icons can be used for student feedback:
  - **Raised hand:** Students can use the hand icon to get your attention or ask a question; use this icon to also get consensus or feedback just like raising hands in a classroom.
  - **Checkmark/X or Yes/No or Thumbs Up/Thumbs Down:** Icons can be used to indicate agreement/disagreement or ready/not ready.
- **Attendee status icons:** Different icons indicate when students have stepped away or are not available.
- **Poll:** Pose a question and get feedback from students; some tools instantly collate information into a final feedback form.
- **Breakout rooms:** Smaller group sessions within a primary session can be set up and managed during a live session.



## External Tools

There are multiple virtual learning tools available on the Internet. (Some examples are provided for reference; many options can be found in simple browser searches.) Some of the most popular features for synchronous collaboration are:

- **Brainstorming:** Students can collaborate in real-time using a virtual whiteboard and tools to share visuals, notes, and text:
  - [Miro](#)
  - [Stormboard](#)
  - [Brightidea](#)
- **Threaded discussion boards:** Students engage in open forum discussions, which usually are best used when assigned with a question prompt and then students have time to respond and share thoughts:
  - [Kialo](#)
  - [NowComment](#)
- **Polls:** External polling software is available if the Web-conferencing tool doesn't provide one:
  - [Poll Everywhere](#)
  - [Survey Monkey](#)
  - [Mentimeter](#)
- **Mind mapping/flowcharts:** Students organize their thoughts for brainstorming or thought organization:
  - [Coggle](#)
  - [GitMind](#)
  - [Sketchboard](#)
- **Visual content/infographics:** Students can design projects for everything from infographics to logos, screen shots, and images:
  - [Canva](#)

## Best Practices for Virtual Engagement and Learning

The following best practices may be helpful when delivering *JA Company Program Pop-Up* in remote, virtual environments.

1. Encourage student collaboration. Use collaboration tools or shareable documents so students can collaborate during a session or outside of class.
2. Use reflection or question prompts as opportunities to open discussion. Use open-ended discussion questions during live sessions to engage students and delve deeper into topics. Or, ask questions that require students to pick



a side and state their opinion. Prepare questions ahead of time to guide the discussion.

3. Collect information before class. Send a quick email or a 1- to 3-question survey a day or two before class asking students about their experiences or opinions relevant to the session topic.
4. Use web cameras. Ask participants to keep their cameras on. Seeing faces creates a sense of connection and students' attention tends to stay focused when they are seen. (If bandwidth issues arise, you can always turn off video feeds later.)
5. Socially connect with students. Use the first few moments of the session to do a quick social check-in to break down the virtual barriers and warm up students.
6. Use group forums. Use tools like Slack to open discussion and information share via learning channels between sessions to increase camaraderie and engagement between students.

## **JA COMPANY PROGRAM POP-UP STUDENT ASSESSMENT STRATEGY**

Each module provides a bank of knowledge assessment questions that can be used for formative assessments to gauge progress and student comprehension.

## **PLAN FOR VOLUNTEERS**

This instructional guide serves both teachers and volunteers alike. The program's facilitation materials are developed to support anyone leading these meetings. If the implementation model includes a teacher and volunteer partnership, they can share instructional responsibilities, or the volunteer can provide a support role during students' work on the project. Students will benefit from volunteers' entrepreneurial expertise and experience in setting up and launching new businesses.

## **Volunteer Code of Conduct**

Each year Junior Achievement staff shall convey these standards in writing to all volunteers prior to their first visit to the classroom. Staff shall review these standards verbally, as well, with volunteers teaching for the first time. Junior Achievement (JA) serves youth. JA volunteers teach valuable lessons in their program delivery and especially in their conduct with students. Adult misconduct with or in the presence of youth carries serious consequences. Because Junior



Achievement cares that its volunteers have healthy, appropriate relationships with the youth they serve, it has established the following standards.

1. Young people look to adults for examples of appropriate behavior. JA volunteers must use appropriate language and model honorable behavior, such as respect, integrity, honesty, and excellence. Profanity or sexualized language or jokes are inappropriate when working with students, regardless whether it occurs face-to-face, over the Internet, or by any other means. JA strictly forbids violating any state law regarding interactions with youth; for example, providing them alcohol or legal or illegal drugs, or coaxing them into illicit relationships over the Internet or otherwise.
2. Volunteers should avoid all contact with students beyond a business handshake.
3. Interactions with students must both be appropriate and appear appropriate. It is expected that volunteers' interactions with students are at all times appropriate and professional and are strictly related to the role of business mentor. It is unacceptable to seek or engage in one-to-one meetings with students at any time.
4. Volunteers are responsible for the quality of interactions. Students often find it difficult to state discomfort or objections. Volunteers must be especially sensitive to physical and verbal cues that youth provide.
5. Volunteers will be presenting, facilitating and discussing various programs, content and ideas with students that are likely owned by JA, its licensors or the students. A primary purpose of the JA programs is to encourage creativity by the students. By working with JA and the students, Volunteer agrees that they do not obtain any intellectual property rights therein, will not seek ownership in or to contest those intellectual property rights, and will not attempt to secure trademark, patent or other intellectual property rights or registrations therein without prior written consent from Junior Achievement USA.

The aforementioned standards do not represent a comprehensive list. Other actions not included could result in suspension or dismissal as a volunteer. JA volunteers also must read and comply with JA's Social Media Policy.

Junior Achievement takes all complaints of misconduct seriously. Credible allegations of misconduct will be promptly reported to the appropriate authorities. During any such investigation, the JA volunteer will not perform services as a JA volunteer. If an investigation determines misconduct occurred, it will result in the immediate and permanent dismissal as a JA volunteer.

Any JA staff member or volunteer who reasonably suspects misconduct must report these suspicions immediately to the appropriate JA staff person within their JA Area.



# Guide for Volunteers and Teachers

The following talking points and instructions are designed to help you facilitate the meeting and enhance student discussions. Headings correspond to the topics and onscreen headings in the onscreen presentation.

## Meeting One: Pop-Up Warm-Up

### OVERVIEW

This meeting introduces the Pop-Up program experience and reviews the milestones related to the project. The entrepreneurial mindset and characteristics are explored to guide students in envisioning the pop-up experience through the eyes of an entrepreneur. Finally, students review the primary business goal for the pop-up project and discuss how to set business success goals and personal growth goals.

This meeting will take 45–60 minutes to complete, depending on how you decide to implement the program as explained in the Planning and Teaching *JA Company Program Pop-Up* section. You will need to adjust your meeting approach accordingly.

### MEETING NOTES

Plan to run Meeting One according to the implementation option you selected. The following notes describe how to run each option.

There are two options for setting up the pop-up business: a predetermined pop-up or a student-selected pop-up. Note that a predetermined pop-up will take less time during this meeting. A student-selected pop-up will add time to your meeting or require a separate meeting devoted entirely to this topic, depending on your specific class. Follow the appropriate steps for your class.

#### 1. Option 1: Predetermined Pop-Up

- Reveal what the predetermined pop-up business will be. Provide as much specific detail as possible to give students a clear idea of what they will be doing.

*Examples include: running ticket sales for the annual school talent show, selling apparel with a new logo for a school organization, etc.*



## 2. Option 2: Student-Selected Pop-Up

- Pre-select the pop-up category from the three options provided below. Reveal the pop-up category. Students will then give their input on a pop-up business within that category. Provide some examples, depending on which one you select.
  - Sell merchandise with a design.  
*Examples include: selling apparel with a new logo for a school organization, selling school supplies designed by student artists, etc.*
  - Create/promote/conduct sales for an event.  
*Examples include: running ticket sales for the annual school talent show, running a book fair, etc.*
  - Run an existing fundraiser.  
*Examples include: selling raffle tickets to buy new library books, running the annual bake sale to support a scholarship fund, etc.*
- Brainstorm ideas with the students and determine the idea for the business. The business idea must be identified before proceeding further in the program.

## MEETING PREPARATION AND MATERIALS

Before the meeting, do the following:

- ☐ Review the Detailed Topic Guide to determine what topics and activities you will include during the meeting. Recommended topics and activities are noted as “Required.”
- ☐ Review all the activities and materials, including the onscreen presentation and student materials.
- ☐ Open and preview any videos and websites used in the activities.
- ☐ Review any specific notes for the meeting’s activities to determine how to conduct them. Determine any optional activities that you may also incorporate during the meeting time or instruct students to complete on their own time.
- ☐ Determine how best to organize students to complete the activities (small groups, stations rotation, flipped classroom model, whole class, etc.).
- ☐ Distribute the students’ **Pop-Up Planners**. Students should add their name in large writing on the front of their **Pop-Up Planner** so it is easily identified. They will be using this workbook throughout the Pop-Up program.
  - Collect the students’ Planners at the end of each meeting and distribute them at the beginning of each meeting if you are in an in-person, face-to-face learning environment.



- Instruct students to save their **Pop-Up Planners** in a convenient location on their computers to access during each session, if you are in a remote, virtual learning environment.

## MATERIALS ACCESS

Digital versions of student materials and the onscreen presentations can be accessed from JA Connect, the JA Learning Platform.

- If you are projecting the materials, practice navigating and using the interactive features.

## DETAILED TOPIC GUIDE

The following guide provides a closer look at each of the topics in Meeting One. All topics and activities presented in this table flow in sequential order. All activities in this meeting are instructor-led.

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
none	<p><b>1.1 Pop-Up Program Overview</b></p> <p>(15 minutes)</p> <p>This topic sets the stage for the pop-up business experience, identifies the business product or service, and reviews the program's milestones.</p> <p><b>Students will:</b></p> <ul style="list-style-type: none"> <li>• Explain what a pop-up business is and its intended purpose.</li> </ul>	<p><b>Activity Notes:</b></p> <p>Prepare to discuss the chosen implementation option with the class. Review the program notes and the Meeting Notes about how to prepare logistically for the option you select.</p>	<b>Pop-Up Planner</b>	15 minutes

(continued)



(continues)

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
none	<p><b>1.2 Being a Pop-Up Entrepreneur</b> (10 minutes)</p> <p>This topic introduces entrepreneurial characteristics for students to contemplate as they review the project's milestones for the pop-up business.</p> <p><b>Students will:</b></p> <ul style="list-style-type: none"> <li>Recognize the entrepreneurial characteristics that an entrepreneur must possess to achieve a successful business venture.</li> </ul>	<p><b>Required Activity: Using Entrepreneurial Characteristics to Run a Business</b></p> <p>In this activity, students consider which entrepreneurial characteristics might be important at each phase of the project to achieve success.</p> <p><b>Note:</b></p> <p>Entrepreneurial characteristics are woven throughout the program to expose students to the entrepreneurial mindset. Consider situations and examples where these characteristics can be highlighted as they relate to the elements of the pop-up experience.</p>	<b>Pop-Up Planner</b>	5 minutes

(continued)



(continues)

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
none	<b>1.3 Setting Business Goals for Pop-Up Success (20 minutes)</b> This topic discusses the importance of goal setting for business success and reviews the SMART goal-setting format. <b>Students will:</b> <ul style="list-style-type: none"> <li>Document goals for the pop-up business in SMART goal-writing format that reflect business planning elements.</li> </ul>	<b>Optional Video: Three Tips for Setting up a Pop-Up Shop</b> This quick video provides overarching pop-up success tips.	Onscreen presentation	1:01 run time
		<b>Required Activity: Setting Business Goals</b> Students engage in a goal-mapping exercise to identify their business goals for the pop-up business.	none	15 minutes



## WELCOME



Introduce yourself. Tell students your name and a little bit about yourself. Describe your business or business education experience.

*Example: Hi, I'm Mr. Smith. I will be leading your JA Company Program Pop-Up experience. My father ran a successful business when I was growing up, and he always let me help him with different parts of the business, so I'm very excited to see how my experiences can help you learn about establishing and running your own business.*

Get acquainted! Ask each student to introduce him- or herself and share one interesting fact. (Optional)

Instruct students to complete the Pre-Program survey, available in Meeting One in the JA Connect course.

## 1.1 POP-UP PROGRAM OVERVIEW

15 MINUTES ⌚



### Objectives



By the end of this learning topic, students will be able to:

- Explain what a pop-up business is and its intended purpose.



### Discuss: Businesses



Get students thinking about businesses by relating to their everyday lives. Ask questions to help them start making connections.



**What are some examples of businesses you interact with on a regular basis?**

*In addition to the answers students provide, some additional examples may be: gas station, convenience store, grocery store, clothing store, restaurant, gym, coffee shop, farmer's market, etc.*



1. Click on the presentation slide to reveal some answers to the question.

**? What do all businesses have in common?**

*In addition to the answers students provide, suggest the following: they all sell something, they have set hours, they have a set location, they have staff, they have inventory, etc.*

- ... Businesses have a lot of similarities, even when they sell different products. In this program, we will work with one specific type of business: a pop-up.**



2. Define a pop-up business.

- ... A pop-up business is a temporary business that is open only for a limited amount of time. It is different from a traditional business, because it is not permanent. However, its setup and operation are very similar to a traditional business's.**

3. Provide examples of pop-ups: book fairs, lemonade stands, ticket sales for an event, and fundraisers. Also, seasonal services (e.g., lawn mowing or snow shoveling) are considered pop-up businesses.



## Activity: Class Poll



1. Poll the students by show of hands to reveal how many have been involved in some sort of pop-up, like a lemonade stand or snow shoveling.
2. Time permitting, ask for a few students to share their experiences.



## Discuss: The Program



1. Explain that in this program, students will plan, promote, run, and close their pop-up experience.
 

**... It will be your responsibility to plan, promote, launch, run, and finally close this temporary business to meet a business goal.**
2. Point out that the **Pop-Up Planner** is a workbook that students can use to take notes and record ideas and tasks to help map out their pop-up experience.



3. Review what they will learn in this course and the major skills they will refine.

- ☞ You will learn the business and management skills necessary to run a business. This will prepare you to solve real-world problems and become a better communicator—no matter what future you pursue.
- ☞ You will also learn important life skills by learning and doing while giving back to your community. For example, you will learn creativity while you explore ways to build hype about your business; collaboration, as you work together as a team; and self-confidence, as you learn good customer service skills and sales strategies.



## Discuss: The Business Idea



1. **Depending on the implementation option you selected during preparation**, proceed as follows:

- **Option 1:** Predetermined Pop-Up – Reveal the pop-up business idea that the students will run.
- **Option 2:** Student-Selected Pop-Up – Share the product or service category that you selected for the pop-up business (sell merchandise with a design; create/promote/conduct sales for an event; or run an existing fundraiser).
  - Brainstorm ideas with the students to come up with a product or service idea.
  - **Note:** If students need more time to come to a decision, narrow the choices down to their top three and give students time to think about it outside of class. Start Meeting Two with a vote on the business idea.

### **INSTRUCTOR NOTE:**

In Meeting Two, students will be conducting market research on their pop-up shop's product offering. During the business idea discussion in Meeting One, prompt students to start thinking about the product or service options they might want to offer so that they have a clear understanding of what to explore in their market research. (For example, if students decide to sell t-shirts, they might want to determine t-shirt colors and print design choices.)

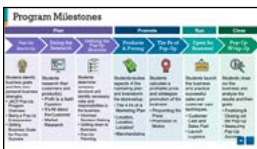




## Discuss: Pop-Up Business Phases



1. Explain the four business phases that make up the program experience: plan the business, promote the business, run the business, and close the business.
  - Plan – all of the preparation and setup that goes into opening the business
  - Promote – all of the marketing and advertising done to create a “buzz” and build interest to make the pop-up a success
    - As needed, define *marketing* and *advertising*:
      - **Marketing** – Promoting and selling products or services
      - **Advertising** – A marketing strategy involving advertisements (ads) to promote and sell products or services
  - Run – all of the day-to-day operations needed to ensure the business runs smoothly
  - Close – all of the clean-up and close-out tasks once the pop-up is closed
2. Review the **Program Milestones** chart in the onscreen presentation (also included in the **Pop-Up Planner** on page 4). This will give students a framework of what to expect throughout the program.



Meeting Name	Description	Milestones
Pop-Up Warm-Up	Students identify business goals and their own personal business strengths.	Pop-Up Program Overview Being a Pop-Up Entrepreneur Setting Business Goals for Pop-Up Success
Doing the Research	Students research their customers and product(s).	Profit Is a Math Equation It's All about the Customer Market Research
Defining the Pop-Up Structure	Students determine the company structure and identify the necessary roles and responsibilities in the business.	Informed Decision Making Getting Down to Business Pop-Up Planning
The Ps of Pop-Up	Students review aspects of the marketing plan and brainstorm the store setup.	The Four Ps of Marketing Location, Location, Location Merchandising

(continued)



(continues)

Meeting Name	Description	Milestones
Creating the Buzz	Students calculate a profitable price and strategize promotion of the business.	Pinpointing the Price Promotion in Motion
Open for Business!	Students launch the business and practice successful sales and customer care techniques.	Customer Care and Sales Flair Launch Logistics
Pop-Up Wrap-Up	Students close out the business and analyze the results and their goals.	Pop-Up Closeout Measuring Pop-Up Success

## 1.2 BEING A POP-UP-ENTREPRENEUR

10 MINUTES 

### Objectives



By the end of this learning topic, students will be able to:

- Recognize the entrepreneurial characteristics that an entrepreneur must possess to achieve a successful business venture.

### Discuss: What Is an Entrepreneur?



1. Introduce what it means to be an entrepreneur – An entrepreneur uses his or her unique skill set to start and run a business.

#### **INSTRUCTOR NOTE:**

Throughout the Pop-Up meetings, entrepreneurial characteristics will be reviewed and woven into discussions to acquaint students with the characteristics. The purpose is to relate entrepreneurial characteristics to the phases of the pop-up business experience so that students can begin to recognize those characteristics in themselves as well as find opportunities for personal entrepreneurial growth.





? Do you have what it takes to run a successful pop-up? People like Steve Jobs, Oprah Winfrey, Bill Gates, and Walt Disney are all remarkable entrepreneurs. And they all have characteristics that make them great entrepreneurs.

? What types of characteristics do you think they all have in common as entrepreneurs?

*Answers should include: self-confident, risk-taker, persistent/persevering, adaptable, decisive, creative, problem-solver, critical thinker*



2. Point students to the **Pop-Up Entrepreneurial Characteristics** section on page 5 of the **Pop-Up Planner** for a list of characteristics.

... As we go through the pop-up program, we'll reflect on the characteristics that make for successful entrepreneurs and intrapreneurs, so keep an eye out for those in upcoming meetings.



## Activity: Using Entrepreneurial Characteristics to Run a Business



1. Direct students to the **Using Entrepreneurial Characteristics to Run a Business** activity on page 6 in the **Pop-Up Planner**.
 

... Think about the types of characteristics you might apply as you work through each phase of this pop-up experience. Look at the list of entrepreneurial characteristics and jot down when you might use certain characteristics throughout this experience.
2. Conduct this activity as a class. Talk about each project milestone and ask the class for volunteers to share their ideas about which characteristics might apply. Keep the conversation succinct, because you will be exploring the characteristics in-depth throughout the program. This activity is a primer to get students thinking about the characteristics.
3. Prompt students to follow along in their **Pop-Up Planner** and jot down ideas.
4. Suggested answers are provided in the table. There are no incorrect answers, but these are some prompts for students, if needed.

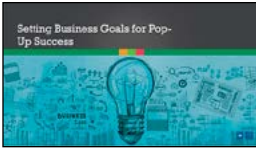


Project Milestones	Description	Entrepreneurial Characteristics
Set business goals	Identify what you want your business to accomplish or what success will look like for your pop-up business.	decisive, risk-taker, problem-solver
Define roles in the business structure	Plan what people will need to do to make the business successful and assign people who will be responsible for those roles.	critical thinker, decisive, adaptable
Perform market research	Ask questions and get input from customers to make your product better.	creative, self-confident, critical thinker
Make marketing decisions and develop strategies	Decide how to market and advertise your pop-up business and how that will help you reach your goals.	creative, decisive, problem-solver, risk-taker
Make merchandising decisions and develop strategies	Decide how to set up your store, display your product, and create the overall customer experience, and how that will help you reach your goals.	creative, decisive, adaptable, critical thinker
Manage inventory	Manage the products and logistics needed to help you reach your goals.	critical thinker, decisive, problem-solver
Conduct sales and customer service	Create a positive customer experience, maximize sales opportunities, and address issues.	self-confident, persevering, adaptable, creative, problem-solver



## 1.3 SETTING BUSINESS GOALS FOR POP-UP SUCCESS

20 MINUTES 




### Objectives



By the end of this learning topic, students will be able to:


- Document goals for the pop-up business in S.M.A.R.T. goal-writing format that reflect business planning elements.

### Explore: Business Goals


 Goals are an important part of your pop-up business. Whether your goals are big or small, they help you plan your business and focus your efforts to achieve success.



1. Watch the brief video for inspiration on business objectives and goals. Ask students to think about their pop-up business and what goals they want to accomplish.


 As you watch this video, think about your pop-up business. What is the first thing you should focus on to have a successful pop-up business?

2. Play the 1-minute video **Three Tips for Setting Up a Pop-Up Shop**.
3. Ask students to reflect on the video and apply the tips to their pop-up business to frame the importance of goals and defining success.

 Focus on the first tip: creating objectives. Why are objectives (or goals) so important?

*They help you measure your success.*

4. It's impossible for a business to be successful if it has nothing to measure its success against. Coming up with goals provides a business with direction, gives the business something to plan for, and defines success.

 What is the most important thing for a successful business to do in order to stay open?

*Make a profit, earn money, earn income, etc.*







- Review the main goals for the students' pop-up business. Provide as much detail as possible about the profit (amount of profit expected) and whom the proceeds will benefit.



The main goal of your pop-up business is to make a profit to benefit a worthy cause.

- As needed, define *profit* and *proceeds*.
  - Profit** is monetary gain. It is the difference between the amount earned and the amount spent. This is the main goal of a business: to earn a profit.
  - Proceeds** are money made from an event or activity.



Profit is your main goal but setting other business goals is an important way to define success. By establishing other, smaller goals, you will be able to create a path to lead you to your main goal. Smaller business goals will help you plan and run your business the way you envision it.



## Discuss: S.M.A.R.T. Goals



- Briefly introduce S.M.A.R.T. goals. Students will apply S.M.A.R.T. goals during the next activity. The S.M.A.R.T. acronym and definitions are in their **Pop-Up Planner** to refer to, as needed. This should be a quick overview to lead into the business goals activity.



Whether you are creating business goals or personal goals, using the S.M.A.R.T. acronym will help you create well-defined goals. At the end of your pop-up experience, you will be able to accurately measure your success.

- Specific** – Be clear and provide details about what you will accomplish.
- Measurable** – Determine how you will measure success, so you know you have met your goal.
- Achievable** – Aim for something that is a stretch for you but is still possible to accomplish with your skill set or using the skills you will learn.
- Realistic** – Make sure your goal challenges you but is something reasonable that you can accomplish by the end of the project.
- Timeline** – Give yourself a goal you can accomplish within the time frame of the pop-up business.





## Activity: Setting Business Goals



1. During this activity, students will brainstorm smaller S.M.A.R.T. business goals as a class. Remember, these goals should stand alone but support the success of the pop-up business.
2. Use the goal-mapping visual in the onscreen presentation to help students envision how the main goal (in the center) is achieved by setting milestone goals and breaking those goals down into smaller tasks.

### INSTRUCTOR NOTE:

Focus the activity on brainstorming goal ideas in quick succession. Students can write the goals in S.M.A.R.T. format as time permits or outside of class.

3. Direct students to use the **Goal-Mapping Worksheet** on page 11 in the **Pop-Up Planner** to take notes and document goals.
4. Recreate the target on a whiteboard, projector, or paper. (If using a projector, use sticky notes on the wall or screen.)
5. Aim for three well-defined S.M.A.R.T. goals that help direct business planning. (These will be milestone goals, since the primary goal (earning a profit to benefit a charitable cause) has already been defined.) As you guide students in their goals, consider a variety of areas to cover: marketing, finance, sales, customer service, etc. Work backwards with the final vision in mind to figure out the milestones needed to get there.

*Goal examples: (1) By the end of the pop-up, 70–80% of the tickets for the fundraiser raffle will be sold. (2) During open hours, the pop-up shop's shelves will be monitored continuously and refilled at least every hour to make sure shelves are stocked with product for customers to buy.*

6. Prompt the class to begin thinking about what success looks like for their pop-up.
  - ? What does the pop-up business need to accomplish for you to be able to call it a success? What do you want the end results to look like?

*In addition to the answers the students provide, suggest the following: make money, draw a big crowd, excite people, sell all products/tickets, etc.*



7. Write the main goal in the middle (make \$X profit for Y). From there, jot down milestone goal ideas and any associated tasks.
8. Ask the students to consider how they will accomplish those goals. Pose the following questions to help frame their thinking:
  - ? How can you break down the main goal into smaller measurable goals?
  - ? What actions will help you get closer to making a profit?
  - ? What other successes would you like to see?
9. Call on students for ideas or allow them to come up to the whiteboard/projector screen/etc. to contribute. Allow students to come up with multiple simple ideas before narrowing their selections down to three ideas. Have students work to turn those three ideas into S.M.A.R.T. goals.
  - ? What might some smaller goals look like in a business context to help you meet your main goal? Think about these examples to get started: How can you maximize customer traffic? What are the best ways to “create hype” about the pop-up? How can you minimize your costs, which ultimately will increase your profit?  
*Simple goal ideas: create contingency plans for low inventory/staffing issues/cash shortage, etc.; maximize sales and profit; maximize efficiency; generate interest; address customer service issues quickly, etc.*
10. Instruct students to work through the goal-mapping activity until they have three rings mapped out with information. Remind students that their goal mapping should be captured in the **Pop-Up Planner**.
11. Point out that their goal maps will be a guide for them to use to start determining the next steps in their business tasks and decision making.



## Wrap-Up



1. Remind students the key things to remember about goal setting:
  - Set S.M.A.R.T. goals.
  - Work backwards, with your final vision in mind.
  - Create smaller milestone goals to help accomplish the bigger goal.
2. Remind students that the main goal—raising money for a good cause—will be the focus of their entire pop-up business experience. Focusing on ways that they can apply entrepreneurial characteristics during the work they do for the pop-up business will contribute to its overall success . . . and personally help them develop their entrepreneurial skills.



## Extended Opportunities

Time permitting, consider these extended opportunities for additional student enrichment or activities to be completed by students on their own.

### Activity: Personal Goal

1. Direct students to the optional **Personal Goal** activity on page 12 in the **Pop-Up Planner**.
2. Challenge students to take some time to consider what personal goals they want to set for this program.
  - ? What do you want to accomplish?
  - ? What does success look like for you?
3. During this activity, students will identify a personal, entrepreneurship-related S.M.A.R.T. goal to accomplish during the pop-up business experience.

### Activity: Create a Business Name

Think about a possible business name! Have each student come up with one name idea to add to a class poll to be taken during the next meeting.



# Meeting Two: Doing the Research

## OVERVIEW

This meeting focuses on the main goal for the pop-up business: making a profit. Students will examine the factors of the profit equation and learn about what they need to consider when determining a pricing strategy for achieving their goal. They also will define their target audience and explore the importance of market research for ensuring that their product meets customers' needs. They will prepare market research surveys and conduct independent market research that they will analyze in Meeting Three.

## MEETING PREPARATION AND MATERIALS

Before the meeting, do the following:

- ☐ Review the Detailed Topic Guide to determine what topics and activities you will include in the meeting. Recommended topics and activities are noted as "Required."
- ☐ Review all the activities and materials, including the onscreen presentation and student materials.
- ☐ Open and preview any videos and websites used in the activities.
- ☐ Review any specific notes for the meeting's activities to determine how to conduct them. Determine any optional activities that you may also incorporate during the meeting time or instruct students to complete on their own time.
- ☐ Determine how best to organize students to complete the activities (small groups, stations rotation, flipped classroom model, whole class, etc.).
- ☐ Distribute the students' **Pop-Up Planners**. Collect the students' Planners at the end of each meeting and distribute them at the beginning of each meeting if you are in an in-person, face-to-face learning environment. Instruct students to save their **Pop-Up Planners** in a convenient location on their computers to access during each session, if you are in a remote, virtual learning environment.



## MATERIALS ACCESS

Digital versions of student materials and the onscreen presentations can be accessed from JA Connect, the JA Learning Platform.

- If you are projecting the materials, practice navigating and using the interactive features.

## DETAILED TOPIC GUIDE

The following guide provides a closer look at each of the topics in Meeting Two. All topics and activities presented in this table flow in sequential order. All activities in this meeting are instructor-led.

### Optional Carry-over Activities from Meeting One:

- **Product Idea Activity (10-15 minutes)** - If you gave students time at the end of Meeting One to consider product options for their business, complete the following steps to finalize the product.
  - Allow students to contribute one pop-up business idea.
  - Write all ideas on the whiteboard, projector, or poster board.
  - Have students vote for their favorite idea by show of hands. Tally the votes to determine the product with the most votes. (If the votes are too close, narrow down the top choices and conduct a second round of voting.)
- Prompt students to record the pop-up product (or service) on page 2 of their **Pop-Up Planners**.
- **Personal Goal Activity (10 minutes)** - If students completed their personal goals activity from Meeting One on their own:
  - Take a few minutes to ask for volunteers to share.
  - Discuss what some achievable personal goals might be during the course of this experience.



(continues)

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
none	<p><b>2.1 Profit Is a Math Equation</b> (15 minutes)</p> <p>In this topic, students learn the profit equation (Profit = Revenue – Expenses) and use it to evaluate all of the elements that go into creating a profitable business.</p> <p><b>Students will:</b></p> <ul style="list-style-type: none"> <li>Identify the elements of the profit equation and understand how to calculate profit.</li> </ul>	<p><b>Optional Activity: Managing Your Lemonade Stand Expenses</b></p> <p>Using the information provided, students work to reduce expenses to increase profits.</p>	<b>Pop-Up Planner</b>	10 minutes
none	<p><b>2.2 It's All about the Customer</b> (10 minutes)</p> <p>In this topic, students learn about the people who make up a target audience and the importance of incorporating their customers' wants and needs into the product offering and promotion.</p> <p><b>Students will:</b></p> <ul style="list-style-type: none"> <li>Explain who the target audience is.</li> <li>Recognize the importance of the customers' wants and needs as they relate to the business's goals.</li> </ul>	none	<b>Pop-Up Planner</b>	10 minutes

(continued)



(continues)

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
2.2 It's All About the Customer	<p><b>2.3 Market Research (20 minutes)</b></p> <p>In this topic, students learn the importance of conducting market research to gain valuable customer input into the business's product offering.</p> <p><b>Students will:</b></p> <ul style="list-style-type: none"> <li>Identify appropriate market research techniques to use when collecting information.</li> </ul>	<p><b>Required Activity: Preparing for Market Research</b></p> <p>Students will draft their market research survey questions.</p> <p><b>Activity Notes:</b></p> <p>Students will draft survey questions. They can write them on the whiteboard/easel or use sticky notes. Students will vote on their preferred questions. Tick marks can be made beside/on sticky notes on the board, or small stickers can be used on paper (students should get 2-3 stickers each).</p>	<p><b>Pop-up Planner</b></p> <p>Sticky notes and small stickers (optional)</p>	15 minutes

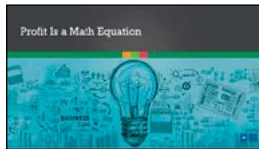




Welcome students to Meeting Two.

## 2.1 PROFIT IS A MATH EQUATION

15 MINUTES ⌚



### Objectives



By the end of this learning topic, students will be able to:

- Identify the elements of the profit equation and understand how to calculate profit.

### Explore: What Is Profit



Think about a time when you wanted to make some money. It could have been for a personal reason, like buying something you wanted; or it could have been to raise money to benefit a group, like selling raffle tickets for a fundraiser. If you haven't done that personally, I bet you can think of someone who has!

The goal was to make a profit . . . which is also your main business goal for your pop-up business. First, you need to understand what a profit is and how to make a profit so you can grasp what you need to do to run a successful business.



- Review the term *profit* and point out that the term is defined in the students' **Pop-Up Planner**.

Profit is the income earned after all expenses have been paid. It is calculated by subtracting the amount you spent from the amount you earned.

- Explain that making a profit depends on more than just earning money. More goes into figuring out the profit, also known as the *profit equation*: **Profit = Revenue - Expenses**.



3. Briefly review the terms of the profit equation. These terms are defined for students in the **Pop-Up Planner** on page 13.
  - *Profit* is the income earned after all expenses have been paid.
  - *Revenue* is the income you earn from the business.
    - This is the first part of the profit equation.
    - An example of revenue is the money a customer pays to buy a product.
  - *Expenses* are the money you spent to make purchases or pay bills.
    - This is the second part of the profit equation.
    - An example of an expense is the rent you pay for your business's location.
4. Instruct students to follow along in the **Making a Profit** section beginning on page 13 of the **Pop-Up Planner**.
5. Ask for volunteers to share what they think should go in the blanks at the top of the **Profit Equation Worksheet**. Instruct students to take notes in the appropriate spaces in the **Pop-Up Planner**.
6. Review another key term: *breakeven point*. It's important for students to know what this term means so they can appropriately estimate their profit and understand the final numbers when they close their pop-up business.
  - The breakeven point is the point at which revenue is equal to expenses, resulting in no profit but also no loss; in other words, the breakeven point is the amount of revenue that is needed to cover the total expenses. At the breakeven point, the money that is coming in from sales is equal to the costs that you have to pay.
  - Point out that profit occurs **beyond** the breakeven point.



## Scenario: Lemonade Stand: Sweet and Successful?



1. Review the pop-up scenario in the onscreen presentation and give students a moment to consider the questions.
  - You spend \$100 to launch and run a lemonade stand for one weekend. When you close the stand, you count your money and discover that you made \$230.
  - What is your breakeven point?



? Did the lemonade stand make a profit?

*The breakeven point is \$100, the same as the expenses. Yes, the lemonade stand did make a profit. Substitute these numbers into the profit equation: Expenses = \$100; Revenue = \$230; therefore, Profit = \$230 – \$100; Profit = \$130.*

2. Review the answers as a class and have a volunteer share or demonstrate how to arrive at the correct answer.
3. Emphasize that, although this scenario involves a product and the students' pop-up business may involve a service, the same information is applicable in both situations.



## Discuss: Adjusting Your Equation



1. Ask students to think hypothetically about a business for a moment and discuss the following question with their neighbor.

? What if you wanted to make a bigger profit? What could you do to increase it?

*Decrease your expenses or increase your revenue.*

2. Explain that one of the most effective ways to increase your profit is to decrease your expenses (money spent on something), also known as your costs. There are two types of expenses in a business:
  - **Fixed expenses** – Costs that do not change and are always the same amount paid on a regular basis (such as rent)
  - **Variable expenses** – Costs that increase or decrease based on external factors (such as the quantity of a product sold, how much something is used, how much someone is paid per hour, etc.)
  - Point out that these definitions are provided in the **Pop-Up Planner** on page 13.



## Activity: Types of Expenses



1. Review the cost examples with the class and complete the sorting activity in the onscreen presentation together. Students will decide whether each expense is fixed or variable. Students can give their guesses in multiple ways; choose one of the following:
  - Take a group poll. Say each expense aloud and ask students to vote whether it is a fixed expense or a variable expense.
  - Say each expense aloud and ask for volunteers to guess whether it is a fixed expense or a variable expense.



- Prompt students to write in the examples for each expense type on the spaces provided in the **Profit Equation Worksheet** in the **Pop-Up Planner** on page 14.

Fixed Expenses	Variable Expenses
<i>Rent</i>	<i>Utilities</i>
<i>Signage</i>	<i>Wi-Fi</i>
<i>Supplies</i>	<i>Inventory</i>
<i>Packaging</i>	<i>Staffing</i>
<i>Lighting</i>	<i>Delivery Charges</i>
<i>Décor</i>	
<i>Furniture</i>	



### Optional Activity: Managing Your Lemonade Stand Expenses



- Time permitting, students will work individually or in pairs to decrease expenses and provide an explanation for why such a decrease is possible. **The goal of the activity is to increase profit by decreasing expenses.**
- Direct students to the **Managing Your Lemonade Stand Expenses** activity on page 15 of the **Pop-Up Planner**.
  - Almost half of your profit equation is made up of your expenses. If you decrease expenses, it can have a positive impact on your profit. Think back to the lemonade stand scenario. In your **Pop-Up Planner**, you will see a detailed record of all the money that went in and out of your business.
  - Similarly, you should keep a record of any money coming in and going out of your pop-up business. This will not only help you plan in the beginning stages, but it will also help you assess your success at the end.
- Instruct students to work through the activity in the **Pop-Up Planner** with a partner or in small groups. There are three tasks to complete:
  - Find ways to decrease expenses.
  - Provide an explanation for how this can be accomplished.
  - Calculate your new profit.



4. Give students 3 minutes to work through the activity before coming together as a class.
5. Request that a couple groups share one expense they were able to decrease and their supporting explanation.

*Answers for possible savings may include: cups (decrease the number purchased, or buy from a supplier who offers free shipping); lemons (purchase powdered lemonade mix instead of buying fresh lemons); water (use tap water instead of bottled water); sugar (eliminate this expense altogether by purchasing powdered lemonade mix); cooler (borrow one from family or neighbor); spoons (use spoons from home)*

Profit = \$		Revenue = \$230		Expenses = \$	
Total revenue	\$230	Number of cups of lemonade sold	\$115	cups plus shipping	\$10
- Total expenses	- \$100			lemons	\$15
<u>Total profit</u>	<u>\$130</u>	× Price per cup	× \$2	water	\$15
		Total revenue	\$230	sugar	\$10
				cooler	\$20
				spoons	\$5
				sign and materials	\$15
				flyers and posters	\$10
				+ stand	+ \$0
				<u>Total expenses</u>	<u>\$100</u>



## Wrap-Up: Profit Points



Review the key takeaways:

- A successful business makes a profit. Only a positive number is a profit. A negative number is a loss. A zero number is breaking even.
- A profit is revenue minus expenses.
- Expenses can be fixed or variable.

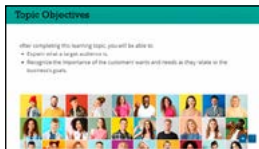


## 2.2 IT'S ALL ABOUT THE CUSTOMER

10 MINUTES 



### Objectives




By the end of this learning topic, students will be able to:

- Explain what a target audience is.
- Recognize the importance of the customers' wants and needs related to the business's goals.

### Warm-Up: Who Comes to Mind?




-  When you think about baby diapers, what type of customer comes to mind?

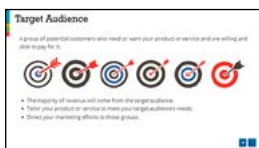
*Answers will vary, but also be sure to mention: Parents with babies may be the easy answer, and they certainly make up a large percentage of diaper customers, but what about grandparents or babysitters?*


-  What about backpacks?

*Answers will vary, but also mention: Students, commuters, hikers, travelers*

-  Some products are immediately associated with a particular type of customer. But really, when you think about the different ways a product might be used, different customers come to mind.

### Discuss: Target Audience



-  The groups of customers you identified in those product examples are called **target audiences**. A target audience is a group of potential customers who need or want your product or service and are willing and able to pay for it.



1. Point out that businesses focus their efforts on connecting with people in their target audiences, because those are the people who will buy the most products or services, to the benefit of the business.
2. Prompt students to record the definition of target audience in their **Pop-Up Planner** on page 17.

... If you know who your target audience is, you can use that information to help your marketing and sales teams make the best decisions. Getting to know important details about your target audience (such as their age, gender, interests, how much money they have to spend and how they like to spend it, etc.) will help you connect with your customers.



3. Explain that being a successful entrepreneur is about knowing the wants and needs of the target audience. The best way to clearly understand their needs is to “walk in their shoes” and understand the issues they have from their perspective. This is called *empathy*.

... Empathy is the ability to understand and share the feelings of another. It is seeing the problem through another person's eyes.

4. Point out to students that there may be more than one target audience. A second target audience has its own set of needs which may be different from the needs of the first. Students should never assume that all target audiences' needs are the same, because they could miss out on an opportunity to market or sell their product to multiple groups of customers.

📖 Share an example from your own experience when empathy was used to understand a target audience.



## Activity: Identify Your Target Audience



1. During this activity, students will identify and describe their target audience to help focus their planning efforts for the pop-up business. The intent of this activity is for students to come to an agreement on the target audience(s). The time needed to complete the activity may vary based on the complexity of the particular type of pop-up business selected by the group.
2. Direct students to the **Market Research** section on page 17 of the **Pop-Up Planner**.

... As a group, we need to answer the big question: what problem or need is your product or service solving, and who needs that solution?



3. Direct students to the **Identify Your Target Audience** activity and instruct them to work through each of the five questions to establish a consensus on who their target audience is. You may call on individual students to offer suggestions, or break students into groups to confer before offering suggestions. Limit any discussion surrounding each question to no more than one minute.
4. Record student answers on a whiteboard or easel and remind students to record their answers in their **Pop-Up Planners**.

**? What is the age range of your customers?** (Example: high school students; adults (such as teachers, staff, parents))

*Based on the target audience's age range, students should consider what type of products to sell (for example, if students have chosen a pop-up company that will sell t-shirts, the target audience's age range may determine what colors or sizes to offer) or what the theme of their event should be (for example, a concert for people in their 40s–50s would feature different music than a concert for teenagers).*

**? When are your customers most likely to shop?** (Example: during lunch hours; after school; in between class periods)

*Based upon when the target audience is most likely to shop, students should consider when the best times or places are for gaining maximum access to those potential customers (for example, if students, around lunchtime by the cafeteria; if staff, near the main office before and after school).*

**? What do your customers like?** (Example: bright colors; food; quick service; short lines; instant results)

*Students should consider trends or interests that would appeal to the target audience of potential customers (for example, product designs with popular anime cartoons, or the school logo).*

**? How much money do your customers have to spend?** (Example: \$20)

*Students should consider how much money the target audience might have available and might be willing to spend on a product, which should influence the products they choose to sell and the price point they set.*

**? What do your customers want and need?** (Example: certain products; fast service; fair prices; options)

*Students should use their market research to learn more about their customers so that they can make good choices in the way they select products, price points, and product promotion options.*





## Debrief: Target Audience Takeaways



1. Explain that the answers from the **Identify Your Target Audience** activity will help shape students' pop-up business planning with respect to product options, marketing efforts, hours of operation, and price points. Pinpointing the needs of your target audience will ensure you can cater to them and achieve business success.
2. Emphasize that students can use the information they determine about their target audience to connect with potential customers to help sell their product!

**? Is it enough to make assumptions about your customers' wants and needs?**

*No. Your assumptions could be wrong. It's important to empathize with your customers! Use firsthand information to ensure that you meet your target audience's needs directly.*

## 2.3 MARKET RESEARCH

20 MINUTES ⌚



## Objectives



By the end of this learning topic, students will be able to:

- Identify appropriate market research techniques to use when collecting information.



## Warm-Up: Why Conduct Research?



**? Have you ever "Googled" something—used a search engine to find an answer to a question? What are some reasons that people research things?**

*Answers will vary but should include: to learn more about a topic; to examine something closely; to find answers to questions you have; to get accurate information*





## Discuss: Market Research



... **Market research is gathering and evaluating data about what customers like and dislike about products and services.**

1. Point out that students can find the definition for market research in their **Pop-Up Planner**.
2. Explain that market research is the best way to connect with the target audience and collect information. Students can use that information to help make business planning decisions, such as what product to buy, what price to set, and how to promote their business to their target audience.

... **The goal is to gather as much information as possible from the target audience. Armed with that information, you can:**

- Create accurate business plans to maximize sales.
- Create a strong, positive customer experience that meets customers' needs.



3. Briefly discuss some techniques for conducting market research.
  - Most popular methods:
    - In-person surveys – conducted face-to-face or over the phone (predetermined, structured questions asked by employees of the business or a market research company, who also record the answers)
    - Questionnaires – usually sent by mail (questions answered and recorded on paper by the potential customer and sent back to the business)
    - Interviews – either one-on-one or in focus groups (in-depth questions asked by employees of the business or a market research company, who also record the answers. Follow-up questions are asked, and potential customers are encouraged to offer additional information as they think of it.)
  - Benefits of face-to-face marketing surveys:
    - Personal interaction with target audience
    - Ability to observe facial expressions and body language
    - Opportunity to build early relationships with customers
    - Ability to ask for additional details, to ask follow-up questions, etc.
4. Emphasize that students will only be performing **in-person surveys** in this program.





5. Review the **Guidelines for Conducting Market Research** section on page 18 of the **Pop-Up Planner** to ensure information is collected in a consistent manner and achieves its objective.

- Stick to no more than 3–5 questions, so that you do not inconvenience your customers.
- Make sure your questions are clearly written and get right to the point—your goal is to uncover information you can use to help your pop-up business.
- Make sure the questions and their answer options capture the purpose of your market research (for example, give specific color options for T-shirts so that you can use that data when ordering products).
- Make sure all team members know how to conduct the face-to-face survey so that everyone does it the same way.
  - In just a few sentences, write an introductory script that explains why you are conducting research.
  - Discuss how to record the information or notes for each question.
  - Create any extra materials needed for the market research (such as a page showing product design options) and decide how to show them to potential customers.



6. Refer students back to the list of entrepreneurial characteristics on page 5 of the **Pop-Up Planner**. Point out the *self-confident* characteristic.
7. Point out that self-confidence comes into play when doing market research, because students might be stepping outside of their comfort zone when approaching people. Feeling self-confident about what they are doing and what they are trying to achieve for the pop-up business is very important for this task.

... A successful entrepreneur believes in his or her abilities. As entrepreneurs for your pop-up business, you need to demonstrate to your customers that you believe in what you are trying to achieve. You're working for a worthy cause!



## Activity: Preparing for Market Research



1. During this activity, students will review the sample questions in the **Preparing for Market Research** activity on page 19 of the **Pop-Up Planner**.



- Split the class into small groups of 2–3 students.
- Instruct students to:
  - Review the **Sample Survey Questions** on page 20 in the **Pop-Up Planner** and select a few that would apply to their pop-up business. (Students can use the questions as they are, or they can modify them to work for their product or service.)
  - Brainstorm some unique questions specific to their pop-up product or service that would be good to ask their target audience.
  - Jot down their question ideas, with specific wording and answer choices.
  - Jot down notes for an introductory script to use when approaching potential survey participants. (Example: "Hello, my name is Joe. I am doing market research for a pop-up business some students and I will be running next month. We'd like to get your input to help us make decisions for the products we will offer.")
  - Jot down notes about how to prepare team members to conduct surveys.



## Debrief: Final Survey Questions



1. Reconvene as a class and ask for volunteers from each group to share their top two questions.
2. Instruct students to come to the whiteboard or easel to add their sample questions. Alternatively, students can write questions on sticky notes.
3. Continue asking for volunteers until you feel that you have a good sampling of questions.
4. Explain that students have two votes each. They should put a mark next to the two questions they think are the best for the survey. (Alternatively, you can give students small stickers to put on the paper next to their two favorite questions.)
5. Once students have finished voting, work with them to refine their top five questions to make them as effective as possible. Ask students if there is any way to improve upon the top three-to-five questions or offer your suggestions for improving them. (Example: Can you make the answers more specific? Would it make more sense to have participants rate their answers instead of picking one? Is the question clear and concise?)



6. Prompt students to write the final survey questions on page 22 in their **Pop-Up Planners**.
7. If you run out of time, students should continue to refine the question choices outside of class until they are complete.



## Activity: Conduct the Survey



1. It's time to conduct market research! Instruct students to survey members of the target audience using the questions created in this meeting (based on the time and schedule you agree upon).
2. Instruct students to use the final questions to create a market research survey document on their own. Tell them to include the introductory script. They should make several copies of the final survey document, enough for each team member to have one survey for each person they talk to.
3. Remind students that surveying someone outside of the target audience could skew results and negatively impact the decisions made for the pop-up business. They should aim to survey as many people as possible within the specified timeframe.
4. Tell students that when they are done with their research, they should tally their individual survey results to bring to the next meeting. In Meeting Three, they will share their results with the class to get an overall class tally.



## Wrap-Up



Review the key takeaways:

- Customers are the key to revenue.
- Market research reveals important information to help direct your business planning.
- The more specific your market research is, the more information your data will reveal to inform your pop-up planning.





## Action Items



Depending on students' ability to complete tasks outside of class, the following action item should be done before Meeting Three. This activity can add significant time to the meeting or may warrant extended time if it cannot be done outside of class.

1. Conduct market research.
2. Tally market research: If possible, create a Google Sheet (or use an alternative spreadsheet tool) and give students access. Once they complete their market research surveys, each student should tally their totals for each answer and add them to the Google Sheet. If this is not possible, the tallying activity will occur at the beginning of Meeting Three.
3. Instruct students to complete the Post-meeting survey.



# Meeting Three: Defining the Pop-Up Structure

## OVERVIEW

During this meeting, students review the market research data they have compiled and look for patterns to inform their decision making as they plan their pop-up business. Then, students explore the different roles and responsibilities of the pop-up company and evaluate their own personal skills and interests to determine what role they will assume during the course of their pop-up experience.

## MEETING PREPARATION AND MATERIALS

Before the meeting, do the following:

- ☐ Review the Detailed Topic Guide to determine what topics and activities you will include during the meeting. Recommended topics and activities are noted as “Required.”
- ☐ Review all the activities, videos, and materials, including the onscreen presentation and student materials, as noted in the Detailed Topic Guide.
- ☐ Review any notes specific to the meeting’s activities to determine how to conduct them. Determine whether you will incorporate any optional activities during the meeting or if there are any that you will instruct students to complete on their own time.
- ☐ Determine how best to organize students to complete the activities (small groups, station rotation, flipped classroom model, whole class, etc.).
- ☐ Distribute the students’ **Pop-Up Planners**. Collect the students’ Planners at the end of each meeting and distribute them at the beginning of each meeting if you are in an in-person, face-to-face learning environment. Instruct students to save their **Pop-Up Planners** in a convenient location on their computers to access during each session, if you are in a remote, virtual learning environment.

## MATERIALS ACCESS

Digital versions of student materials and the onscreen presentations can be accessed from JA Connect, the JA Learning Platform.

- If you are projecting the materials, practice navigating and using the interactive features.



## DETAILED TOPIC GUIDE

The following guide provides a closer look at each of the topics in Meeting Three. All topics and activities presented in this table flow in sequential order. All activities in this meeting are instructor-led except the **I, Me, My and Company Structure** activity, which is self-guided.

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
2.3 Market Research	<b>3.1 Informed Decision Making</b> <b>(15 minutes)</b> Students review market research data and draw inferences that will inform their decision making for the pop-up business. <b>Students will:</b> <ul style="list-style-type: none"> <li>Analyze market research data to make planning decisions about the pop-up business to maximize sales.</li> </ul>	<b>Required Activity: Step One: Tallying Totals</b> Students tally market research results by aggregating the survey sheets. <b>Activity Notes:</b> If possible, to save meeting time, have students submit their totals before this meeting, and calculate the class's totals to share during the meeting. If that is not possible, complete this portion of the activity quickly with a focus on finding the totals. Do not discuss research results yet.	Survey sheets  <b>Pop-Up Planner</b>	5 minutes
		<b>Required Activity: Step Two: Digging into the Data</b> Students review research data to find patterns to help make decisions.	<b>Pop-Up Planner</b>	10 minutes

(continued)



(continues)

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
none	<b>3.2 Getting Down to Business</b> <b>(15 minutes)</b> Students learn about the Marketing, Finance, and Sales roles and then complete self-assessments to determine what role they want to assume during their pop-up experience. <b>Students will:</b> <ul style="list-style-type: none"> <li>Describe the different roles and responsibilities necessary to organize and run a pop-up business.</li> <li>Reflect on their own personal strengths and weaknesses to determine what their role on the pop-up team should be.</li> </ul>	<b>Activity: Matching Roles and Responsibilities</b> Students match responsibilities with the appropriate business roles. <b>Activity Notes:</b> Write each task (located in the Debrief section of the Matching Roles and Responsibilities activity) on a separate sticky note prior to the meeting. List headings for Marketing, Finance, Sales, and All Roles in different places in the room or in four columns on a board, easel, etc. Students will place each task under the appropriate business role.	Sticky notes <b>Pop-Up Planner</b>	5–10 minutes
		<b>Required Activity: I, Me, My and Company Structure (self-guided)</b> Students complete the self-assessment to identify which business role they are best suited for in the pop-up business. <b>Activity Notes:</b> If students are not able to complete this during class time, they should complete this task before the next meeting.	<b>Pop-Up Planner</b>	5–10 minutes

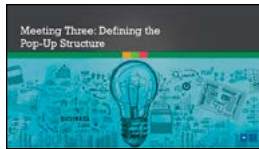
(continued)



(continues)

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
1.1 Pop-Up Program Overview, 3.2 Getting Down to Business	<b>3.3 Pop-Up Planning (15 minutes)</b> Students map out the timeline and associated tasks for launching the pop-up business. <b>Students will:</b> <ul style="list-style-type: none"> <li>Draft a timeline of tasks and associated due dates needed to meet the pop-up company's goals.</li> </ul>	<b>Activity: Roadmap to Success</b> Students map out milestone tasks with due dates. <b>Activity Notes:</b> Students can use the timeline in their <b>Pop-Up Planners</b> , or you can recreate the timeline by projecting the <b>Roadmap to Success</b> image from the onscreen presentation onto a whiteboard or easel paper. Consider using sticky notes or another nonpermanent method so students can move tasks around on the timeline as they plan.	Sticky notes <b>Pop-Up Planner</b>	15 minutes

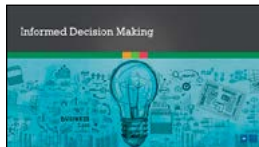




*Welcome students to Meeting Three.*

## 3.1 INFORMED DECISION MAKING

15 MINUTES ⌚



### Objectives



By the end of this learning topic, students will be able to:

- Analyze market research data to make planning decisions about the pop-up business to maximize sales.



### Discuss: Analyzing Survey Data



Using the market research data you collected, the next steps are to:

- Tally individual answers from each survey question to get totals.
- Make observations about the trends you see in the responses and draw some conclusions.
- Use the data to make some decisions about products, price, location, etc., for the pop-up business.



We need to analyze the customers' feedback because we want to be successful. Our customers determine the success of our business through sales.





## Activity: Step One: Tallying Totals



### INSTRUCTOR NOTE:

Complete this activity only if you were not able to tally totals from the market research results in Meeting Two prior to this meeting.

- If you were able to collect all students' market research and tally the results before this meeting, share the tallied totals with the class and instruct them to record the totals in the **Step One: Tallying Totals** section of their **Pop-Up Planners**.
1. Students need to combine the data collected from their individual survey sheets into class-wide totals.
    - ... We need to add up the results from your market research surveys. The totals of the results will show trends within the target audience.
    - ... Later, we will analyze these trends to understand what they mean for your pop-up business.
  2. Instruct students to pull out the survey sheets they completed during market research. Using the **Step One: Tallying Totals** section of their **Pop-Up Planners**, they will record their totals for each question.
  3. Go through each question and calculate the class-wide totals for each answer. To do so, ask each student to quickly share the total for each question/answer combination. Write down students' totals for each answer on a whiteboard or easel paper for everyone to see. Have a student volunteer help calculate class-wide totals for each question/answer combination.
    - For example, read Question 1 and answer option A, and write "1A" on the board. Then, go student by student and record the total number of survey respondents that answered A for Question 1. Once you have gotten the tallies from all students for question/answer 1A, have one student volunteer calculate the class-wide total. Meanwhile, move on to the second answer option (1B) in the same fashion. Repeat this process until all answers have been tallied for Question 1.



- Calculate totals and write them on the board for students to copy into the **Step One: Tallying Totals** section of their **Pop-Up Planners**. Repeat this process for each question and answer option of their market research.

... The next step is to analyze the data collected to see what it tells us. That will help us determine things we need to consider and plan for with the pop-up business.



- Refer students back to their list of **Pop-Up Entrepreneurial Characteristics** on page 5 of their **Pop-Up Planners**. Point out the *critical thinker* characteristic.

... A successful entrepreneur uses critical thinking to tackle tasks—that means that you analyze and evaluate an issue objectively in order to form a judgment. As entrepreneurs running a pop-up business, you need to look at the information with a clear mind and use data to logically guide your decisions.



## Activity: Step Two: Digging into the Data



... Now we are going to split up into groups. Each group will be assigned to analyze the survey responses for one question. This information will inform our business planning decisions.

- Divide the class into the number of groups equal to the number of questions that were on the survey (e.g., five questions = five groups). Each group will analyze one market research question. At the end of the activity, each group will share what information/trends stood out to them, what they need to consider during planning, and any action items they come up with based on the data.

Example: For a price range question:

- Students may discover that the most common price range people are willing to spend is \$10–\$20.
- Based on that information, students may determine that their apparel product options must cost less than \$10 each so that they can mark up the price enough to make a profit and yet stay within their customers' preferred price range.
- Next, they may identify action items to complete, such as researching which clothing product would be a good item to sell in that price range or talking to the vendor to see what printing costs are.



2. Prompt students to follow along in the **Step Two: Digging into the Data** section on page 25 of their **Pop-Up Planners**.
3. Each group should complete the following tasks and answer the following questions.
  - Look at the question data. Identify the main things that stand out, and come up with some recommendations/decisions about pricing, advertising, payments, etc., based on the data they review.
- ? **Look at the question data. What jumps out at you from the answers?**  
*Example: Most of the target audience answered that they are willing to spend \$10–\$20 for the product. No one answered that they are willing to spend \$40–\$60.*
- ? **What thoughts come to mind as far as what to consider for your pop-up business?**  
*Example: We should consider the amount of money the customers have to spend and price our product between \$10–\$20 to make it affordable and increase our sales.*
- ? **What are some business decisions you can make based on what you inferred from the data?**  
*Example: Everyone passes by the cafeteria door during lunch periods. The best location is in the cafeteria lobby.*
4. Give groups 3 minutes to come up with answers for the question they were assigned. Ask students to write down their answers on page 25 of the **Pop-Up Planner** to share with the class at the end of the activity.



## Debrief: Step Two: Digging into the Data



- ... Now we will share our observations and suggestions as a class, which will ultimately shape our business decisions. The decisions we make based on this data will give us the first big-picture glimpse at how our business will work.



1. Bring the class back together and work your way through the survey questions. Ask for a volunteer from each group to share their findings with the class. Encourage all students to record each group's answers on page 25 of the **Pop-Up Planner**.

**?** Have we made any decisions about the pop-up business to this point that now need to be reevaluated in light of the results of the survey data? Or does anyone have an idea or solution that is different than one we came up with?

*Answers will vary. Give the class an opportunity to discuss any other ideas that have cropped up that the class needs to consider before making a final decision.*



## Wrap-Up: Key Factors in Decision Making



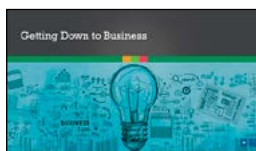
**...** As you plan your pop-up business and start looking at the details, refer to these answers. Remember, your target audience is your customer, and your customer impacts the success of your business through sales.

Review the key takeaways:

- Look at the big picture of your research.
- Use the research to make informed decisions for your pop-up business.
- Keep in mind your target audience as you make decisions.

## 3.2 GETTING DOWN TO BUSINESS

15 MINUTES ⌚



## Objectives



By the end of this learning topic, students will be able to:

- Describe the different roles and responsibilities necessary to organize and run a pop-up business.
- Reflect on personal strengths and weaknesses to determine a personal role on the pop-up team.





## Discuss: Three Business Roles



Remember that the main goal for your pop-up business is to make a profit by running a successful business. Success has many factors; one is a well-organized team that prepares thoroughly and completes all of its necessary tasks.

There are three main business roles that are essential to a successful pop-up business: marketing, finance, and sales.

1. Review each of the three business roles. Refer students to the definitions for each role in the **Business Roles** section of their **Pop-Up Planners** on page 27. Students will explore each area in more detail in the next activity when they will review tasks and assign responsibilities to each business role.

*Marketing* is the process of researching what potential customers want and then advertising to them.

2. Explain that Marketing is responsible for figuring out ways to attract customers to the pop-up store.

Marketing people will brainstorm strategies to get the target audience's attention and draw them to the store.

They also will determine the best way to display the products and lay out the store to maximize sales.

3. Explain that Finance will be responsible for keeping track of money—at the start of the pop-up store, tracking sales, paying all of the expenses, and balancing the accounts when closing out the business.

*Finance* is the management of business money. It includes budgeting and tracking all money that comes in and goes out.

4. Explain that Sales will be responsible for working with the customers, encouraging them to buy, answering their questions, tracking inventory, and exchanging money.

*Sales* is the exchange of money for a product or service. Sales includes techniques to maximize sales, as well as customer interaction and service.



- Point out the **Roles Checklists** beginning on page 28 of the **Pop-Up Planner**. The **Roles Checklists** provide a detailed list of tasks that each business role is responsible for. Explain that students will use the **Roles Checklists** to keep track of the tasks they need to perform to set up, launch, and run their pop-up business.



## Activity: Matching Roles and Responsibilities



### INSTRUCTOR NOTE:

Use the sticky notes that you prepared ahead of time with one task written on each note. Place four headings for the business roles (Sales, Marketing, Finance, and All Roles) somewhere in the classroom.



During this activity, you will be given a few different tasks on sticky notes. You'll need to decide whether the Marketing, Sales, or Finance group is responsible for that task. Or, perhaps all three roles will need to work on a particular task together, in which case, the task will be assigned to All Roles.

- During this activity, students will be given the list of **Business Roles and Responsibilities** starting on page 29 of the **Pop-Up Planner**, and they will match each task to the appropriate business role.
- Divide the class into groups. There should be enough groups so that each group gets 3–4 sticky notes with tasks to categorize.
- Distribute the sticky notes to each group. The groups will need to determine which business role (Marketing, Finance, Sales, or All Roles) has responsibility for each task. Remind students that they can refer back to the definitions and **Roles Checklists**, as needed, during the activity.
- Give students two minutes to discuss their tasks within their groups and decide which business role is responsible.
- Reconvene as a class. Instruct students to place their sticky notes under one of the four role headings around the classroom (Sales, Finance, Marketing, All Roles).
- Give students one minute to place their sticky notes under the headings.





## Debrief: Matching Roles and Responsibilities



1. Review each business role's assigned tasks.

**?** Are there any tasks that you think are the responsibility of a different business role?

*Answers will vary depending on the pop-up business the class will be running. Allow students to move any tasks they agree should be another role's responsibility. The suggestions provided below are a guide; there are no wrong answers.*

2. Once the class agrees on the task assignments, instruct students to record the answers in the Responsible Role column on pages 30–31 of their **Pop-Up Planners**.

### Business Roles and Responsibilities

Marketing	Sales	Finance	All Roles
Prepare tickets for event sales, if applicable.	Order appropriate inventory for merchandise sales, if applicable.	Determine product/service pricing.	Identify business goals.
Determine dates of pop-up and hours of operation.	Perform quality assurance (QA) checks on product, if applicable.	Plan how to handle money in the pop-up store.	Identify personal goal.
Decide on pop-up store location.	Organize staff training for pop-up operations.	Complete Expenses, Sales Tracking, and Profit worksheets.	Conduct market research.
Determine the store layout, including all equipment and materials needed.	Determine staffing schedule.	Finalize financial records.	Make final product decisions (based on market research).
Create and distribute promotional materials.	Track and sell product/service.		Assign business roles.
Set up pop-up store.			Present final proceeds to recipients.





3. Once students have recorded the responsible role for each task in their **Pop-Up Planner**, ask students if any tasks should be added.
  - ? Are there any additional tasks that should be added to the business roles?
4. If students have suggestions for additional responsibilities, work through each one as a class to see if it makes sense and where it fits. Once students have no more suggestions, the list is complete.



## Activity: I, Me, My and Company Structure



1. Time permitting, instruct students to complete this assignment in class. If time is short, students should complete it on their own before the next meeting. During this activity, students will analyze their personal skill sets and strengths/weaknesses to identify how they can best contribute to the pop-up team.
2. Direct students to open and complete the **I, Me, My and Company Structure** activity in their **Pop-Up Planners** on page 31.
  - ... Now that you have a better understanding of the roles needed to make your pop-up business a success, see where you can make the greatest contribution.



## Wrap-Up



Review the key takeaways:

- Each role (Marketing, Finance, Sales) has valuable responsibilities for the pop-up business.
- It takes a team effort to make any business venture successful!



### 3.3 POP-UP PLANNING

15 MINUTES ⌚



#### Objectives



By the end of this learning topic, students will be able to:

- Draft a timeline of tasks and associated due dates needed to meet the company's goals.



#### Activity: Roadmap to Success



Now that you've had an opportunity to explore the primary roles and responsibilities in your business, it's time to "hit the road" and map out the tasks necessary to launch the pop-up store on time. In this activity, you will work together to draft a timeline of the tasks you need to complete to set up and promote the business.

1. During this activity, students will map out the goals, milestones, and tasks needed for their pop-up business. By the end of the meeting, the three business groups will contribute to the timeline for their particular tasks.
2. Divide the class into the specific business roles they've chosen based on the results of the **I, Me, My and Company Structure** activity. There should be three groups – Marketing, Finance, and Sales.
3. Using the same sticky notes you created during the **Business Roles and Responsibilities** activity, distribute the sticky notes to each group based on the business role assigned by the class.
4. Direct students to the **Roadmap to Success** section on page 32 of their **Pop-Up Planner**.





5. Open a version of the roadmap from the presentation and review what is already included:
  - Milestones
    - Plan
    - Promote
    - Run
    - Close
  - Main Business Goal - Make a profit.
6. If the students established any additional business goals in Meeting One, add those to the timeline as a class.
7. Discuss the following items and add them to the roadmap:
  - Expected launch date for the pop-up store
  - Intended length of time (dates) the store will be open for business
8. Instruct students to record the launch date and intended dates of operation on the **Roadmap to Success** in their **Pop-Up Planners** on page 33. Students will work backwards from this launch date to plan for their responsibilities, *so this date is essential to establish now*.
  - ☞ Using the tasks your group has been given, decide where they should be placed on the timeline.
  - ☞ Think about the order in which tasks need to be completed.
  - ☞ Determine whether any tasks rely on other tasks' being completed first. Be sure to consider tasks assigned to other groups, in case there are any dependencies (for instance, if the Marketing group must complete one of its tasks before the Sales group can complete one of its).
9. Remind students that they can find a complete list of the tasks in the **Business Roles and Responsibilities** section of their **Pop-Up Planners**.
  - ☞ Work backwards from the launch date, because that is ultimately the date by which many tasks need to be completed. Some of the tasks must be completed while the store is open or after the store has been closed. Decide where all of the tasks need to be placed.



10. Tell students to plan the time needed to accomplish each task. Note the time needed (1 day, 1 week, etc.) on the sticky note.
  - For example, how much time is needed to finalize product pricing?
11. Give groups five minutes to discuss the length of time they will need to complete each task. Then, instruct students to lay out the sticky notes for their group in sequence from left to right to map out the order.
12. Instruct a volunteer from each of the three groups to lay out the sticky notes from left to right on the board/wall under the main timeline so that there are three rows of sticky notes.



## Activity: Building the Roadmap



1. Reconvene as a class and work together to map out the master roadmap.
2. Instruct a volunteer from each group to present their ideas and place the sticky note for each of their assigned tasks on the timeline. As a class, discuss any areas where others don't agree. As each group adds their sticky notes, make sure tasks from different groups don't have discrepancies.
3. Fill in dates for all of the tasks based on the duration noted on each sticky note.
  - For example, if Marketing estimates that it needs four days to set up the pop-up store, work backwards from the launch date to ensure there is enough time on the roadmap to complete the task.
4. By the end of the meeting, the **Roadmap to Success** should have all applicable goals and tasks.
  - Encourage students to copy the information on to the roadmap in their **Pop-Up Planners**.
  - If time is running short, encourage students to take a picture of the roadmap with their smartphones, or take a picture to provide to the class.
5. In addition, the master roadmap should be shared with the class or posted (online or in the classroom) for students to refer to, as needed.
6. Time permitting, allow business role groups to gather and determine action items for each task and assign particular people to complete those tasks. Students should complete the Assigned Person and Due Date columns in the **Business Roles and Responsibilities** section on page 30 of their **Pop-Up Planners** before the next meeting.





## Wrap Up



Review the key takeaways:

- Business teams have different responsibilities, but success involves all team members working together!
- The **Roadmap to Success** acts as a map to ensure the team knows what has to be done (and by when) before the pop-up business can launch.



## Action Items



Action items that must be completed before the next meeting:

- Business teams should determine the action items for any tasks, due dates, and student or students responsible based on the **Roadmap to Success**. Students should complete the Assigned Person and Due Date columns in the **Business Roles and Responsibilities** section of their **Pop-Up Planners**.
- Instruct students to complete the Post-meeting survey.

Depending on students' ability to complete tasks outside of class, the action items listed should be done before Meeting Four. These activities can take significant time away from Meeting Four or may warrant extended meeting time if they cannot be done outside of class.



# Meeting Four: The Ps of Pop-Up

## OVERVIEW

This meeting introduces students to the Four Ps of marketing (Product, Price, Place, and Promotion), which act as the framework for their pop-up business planning tasks. Students explore which factors to consider when making the important decision of where to locate the pop-up business, and they learn about merchandising, product display, and store layout as important elements of marketing strategy to maximize sales.

## MEETING PREPARATION AND MATERIALS

Before the meeting, do the following:

- ☐ Review the Detailed Topic Guide to determine what topics and activities you will include during the meeting. Recommended topics and activities are noted as “Required.”
- ☐ Review all the activities, videos, and materials, including the onscreen presentation and student materials, as noted in the Detailed Topic Guide.
- ☐ Review any notes specific to the meeting’s activities to determine how to conduct them. Determine whether you will incorporate any optional activities during the meeting time or if there are any that you will instruct students to complete on their own time.
- ☐ Determine how best to organize students to complete the activities (small groups, station rotation, flipped classroom model, whole class, etc.).
- ☐ Distribute the students’ **Pop-Up Planners**. Collect the students’ Planners at the end of each meeting and distribute them at the beginning of each meeting if you are in an in-person, face-to-face learning environment. Instruct students to save their **Pop-Up Planners** in a convenient location on their computers to access during each session, if you are in a remote, virtual learning environment.

## MATERIALS ACCESS

Digital versions of student materials and the onscreen presentations can be accessed from JA Connect, the JA Learning Platform.

- If you are projecting the materials, practice navigating and using the interactive features.



## DETAILED TOPIC GUIDE

The following guide provides a closer look at each of the topics in Meeting Four. All topics and activities presented in this table flow in sequential order. All activities in this meeting are instructor-led.

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
none	<b>4.1 The Four Ps of Marketing</b> <b>(15 minutes)</b> Students review the four elements of the marketing mix – product, price, place, and promotion. <b>Students will:</b> <ul style="list-style-type: none"> <li>Explain the importance of the four Ps of the marketing mix related to a pop-up business.</li> </ul>	<b>Required Video: The 4Ps of the Marketing Mix Simplified</b>	Onscreen presentation	02:46 run time
4.1 The Four Ps of Marketing	<b>4.2 Location, Location, Location</b> <b>(10 minutes)</b> Students explore the importance of aligning the location of the pop-up business with their target audience to maximize success. <b>Students will:</b> <ul style="list-style-type: none"> <li>Identify the location for the pop-up business to include dates and hours of operation details for the Place “P” detail of the marketing mix.</li> </ul>	<b>Required Activity: Landing a Location</b> <ul style="list-style-type: none"> <li>Students brainstorm places for their pop-up store.</li> </ul>	<b>Pop-Up Planner</b>	5 minutes

(continued)



(continues)

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
4.1 The Four Ps of Marketing	<p><b>4.3 Merchandising (25-30 minutes)</b></p> <p>Students learn about product display and store layout as important elements of marketing strategy.</p> <p><b>Students will:</b></p> <ul style="list-style-type: none"> <li>Design an optimal layout for the pop-up business that will maximize sales.</li> </ul>	<p><b>Required Activity: Design Your Store Layout</b></p> <p>Students sketch a store layout for the pop-up store, highlighting product displays and signage.</p> <p><b>Activity Notes:</b></p> <ul style="list-style-type: none"> <li>Students can use digital resources to sketch store layouts (free apps include SmartDraw, DrawPlan, and LucidChart), or they can make paper sketches. Based on class resources, determine which options students can use for this activity.</li> <li>Students can read articles for inspiration. The following articles can be accessed online from their <b>Pop-Up Planners</b> (if they are using them digitally). Alternatively, you can provide printed versions or recommend that students read them on their own. <ul style="list-style-type: none"> <li><b>Pop-Up Shop Layout Tips: How to Design an Unforgettable Experience</b></li> <li><b>How to Effectively Design Your Pop-Up Shop</b></li> <li><b>Point of Sale Marketing: 6 Strategies for Better Profits</b></li> </ul> </li> </ul>	<b>Pop-Up Planner</b>	20 minutes





*Welcome students to Meeting Four.*

## 4.1 THE FOUR PS OF MARKETING

15 MINUTES ⌚



### Objectives



By the end of this learning topic, students will be able to:

- Explain the importance of the four 4 Ps of the marketing mix related to a pop-up business.



### Warm-Up: Which Would You Buy? And Why?



1. Ask students to look at both images in the onscreen presentation for a moment and consider the following question:



**Which hat would you buy? And why?**

*Answers will vary but should include: product is too expensive; there is no immediate need for the product; customers want to buy something during the season it's needed.*

2. Ask for a few student volunteers to share their answers.



**It's important to keep your customers' wants and needs at the heart of your decisions at all times. Consider the following:**

- *Why* do customers want to buy your product or service?
- *When* is a good time to promote your product or service to them?
- *Where* will your product attract attention?



**A lot of factors go into setting up and marketing your pop-up business.**





## Discuss: The Promote Phase



1. Students are now moving into the Promote phase on the roadmap. During this phase, students take actions and make decisions that directly relate to the promotion and, ultimately, the launch of their pop-up business.

As we transition from the Plan phase to the Promote phase on the roadmap, our focus will shift from planning our pop-up business to the actual details and decisions we need to make to launch the pop-up. The things we need to consider focus on four areas – the product, the price, the place, and the promotion. These are known as the four Ps of Marketing.



2. Instruct the students to watch the following video and take notes in the **Phase 2: Promote** section of their **Pop-Up Planners** on page 35. Tell them to note some key elements of each of the four Ps, which you'll discuss after the video.

3. Play the “**The 4 Ps of the Marketing Mix Simplified**” video.

4. Ask for student volunteers to share their definitions for each of the four Ps. Remind students to note the definitions in **The Four Ps of Marketing** section of their **Pop-Up Planners** on page 36.



? What is the Product?

*The product is the thing you are selling.*

? What is the Price?

*The price is the amount you sell your product for.*

*If you set the price too low, you might not make a profit; if you set the price too high, people might not buy your product, and you won't make a profit.*

? What is the Place?

*The place is where you sell your product.*


*Different products are sold in different places to be available to potential buyers.*

? What is Promotion?

*Promotion is how you tell people about your product.*



5. Discuss items related to each P – things students need to think about and make decisions on before the launch of their business. Discuss them from left to right as they appear in the onscreen presentation – Product, Price, Place, Promotion. Display the answers in the presentation by clicking on each “P” to reveal the answer box.
  - *Product* – design, inventory count, product choices, packaging, display
  - *Price* – retail amount, bulk discount, supplier cost
  - *Place* – physical location, online store
  - *Promotion* – advertising, flyers, signs, social media
6. Review the goal of the four Ps of Marketing and the role they play in the pop-up.
 

 **The goal of the four Ps of Marketing is to outline the factors necessary to launch your pop-up business. The marketing mix is the ingredients you need to attract your customers to your store, make sales, and reach your main business goal of making a profit.**
7. Remember, students will review each of these Ps in greater detail, so this should be just a brief introduction to the concepts.



## Wrap-Up: Remember the Ps



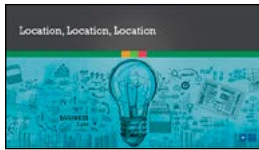
Review the key takeaways:

- The four Ps of Marketing are Product, Price, Place, and Promotion.
- Frame each of these around your target audience to achieve pop-up success.



## 4.2 LOCATION, LOCATION, LOCATION

10 MINUTES 



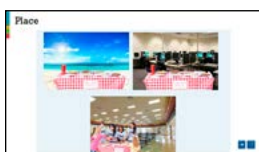
### Objectives




By the end of this learning topic, students will be able to:


- Identify the location for the pop-up business to include dates and hours of operation for the Place "P" detail of the marketing mix.

### Warm-Up: Place



-  Your pop-up business's location can be a major key to meeting your main business goal of making a profit. A well-thought-out location leads potential customers to your pop-up store naturally! Sometimes picking a place can be as easy as making the obvious choice. But it's important to consider all factors when deciding on the best location.

Review the following scenario with the students. Give them a few moments to reflect, then ask for student volunteers to share their responses. There are no wrong answers, but students should support their case with an explanation.

-  Imagine you are hosting a bake sale fundraiser. Would it make sense to set up and sell outside on a hot summer day? Why, or why not? What about inside in the computer lab? Why, or why not? Can you think of a location that would make sense?

*Possible answers: It wouldn't make sense to set up outside on a hot summer day, because baked goods could melt. It wouldn't make sense to set up in a computer lab, because no food is allowed in there. The best place to set up a bake sale would be a lunch room. It's a high traffic area and people come there intending to spend money on food.*





## Discuss: Picking the Perfect Location



Explain that the physical location (where) and time (when) are key factors to consider when selecting a place for the pop-up store. It's important for students to understand that "place" also includes the hours of operation and date(s) the pop-up store will be open.

- ? Where will you get the most traffic from your target audience?
- ? When will you get the most traffic from your target audience?
- ? What other factors play into the decision about where the pop-up store should be located?
- ... Determining the perfect location requires you to investigate factors beyond just the best space. Consider things like whether the space is available to your target audience on the days and times that you want to run the store. Or, if you need to run a cash register or lights for product displays, does the space have electricity?



## Activity: Landing a Location



1. During this activity, brainstorm as a class all the possible locations for the pop-up store.
2. Write ideas on a whiteboard or easel for students to see. As volunteers offer their suggestions, also ask them to give their reasoning, so that the class can understand the logic behind the suggested location.
3. After the brainstorm, ask students to vote for the option they think will yield the best traffic and sales.
4. Tally the votes to determine the final location of the pop-up store. In the event of a tie, discuss the top choices with the students and brainstorm the pros and cons of each before taking a final vote.
5. Prompt students to note the final location in the **Location, Location, Location** section of their **Pop-Up Planner** on page 37.
6. Next, discuss hours and dates. Remember, students will be running the pop-up store themselves, so they need to be aware of their own availability and schedules. (Students will establish a staffing schedule for the store in a later meeting.)
7. Once determined, prompt students to note the date(s) and times in the **Location, Location, Location** section in their **Pop-Up Planners** on page 37.







## Wrap-Up: Remember the Ps



Review the key takeaways:

- Location, hours, and date(s) are important choices in the Promote phase.
- Make these decisions based on your target audience, and you're sure to be successful!

## 4.3 MERCHANDISING

25-30 MINUTES ⌚



## Objectives



By the end of this learning topic, students will be able to:

- Design an optimal layout for a pop-up business that will maximize sales.



## Explore: Showcase Your Product



1. Explain to students that, because they will be promoting an already established product or service, this topic focuses on how to showcase the product and lay out the store best to maximize sales and appeal to the target audience.

💬 Showcasing a product means displaying it in the best possible way to attract attention from potential customers and enhance the product's features.



- ? For example, if you design a cool new logo for school spirit wear, do you want to stack the shirts folded on a table, or do you want to display one of the shirts on a mannequin or on a hanger on the wall?

*Shirts can be folded if one is tilted up so that the logo is readily displayed; however, a mannequin standing behind the stacked shirts or a shirt hanging on the wall would really draw the customer's eye and show off the cool new design.*



2. After showing students the image in the onscreen presentation, ask them the following question:

- ? What do you think this product display communicates to customers?

*Answers will vary but should include: buy dress shirts; these shirts come in many colors; buy these ties, because they match nicely with the shirts*

- ... Product displays can communicate more than just the product you are selling. If you are selling more than one item, put different products together to see how they work together.

- Signs can also be used to demonstrate various ways to use the product.
- Signs can tell a story, so that customers can envision themselves using the product.
- Signs can give pricing information, including sales or discounts.
- Signs that show the product being used can help customers expand their thoughts about the product use.

- ... Signs can also convey a worthy cause to tap into people's emotions.

## Discuss: Brainstorm Time



1. Brainstorm with students about their product or service. As students share their thoughts about ways to display their product or things they may want to include on signs, write down their ideas.
2. Point out that students have an area for recording notes in the **Product Showcasing Ideas** section of their **Pop-Up Planner** on page 38.
3. Refer students back to their list of **Pop-Up Entrepreneurial Characteristics** on page 5 of their **Pop-Up Planners**. Point out the *creative* characteristic.





... Successful entrepreneurs use their creativity to come up with new ideas. As entrepreneurs for your pop-up business, you need to look for fresh and exciting ways of laying out your store and displaying your product.

4. Remind students that being creative is about wide-open brainstorming; nothing is too outlandish or inconceivable when ideas are flying. Think of as many things as you can in a few minutes and then start to narrow down ideas based on what's realistic for the location, the available supplies, etc.



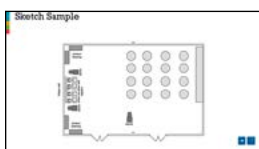
## Activity: Design Your Store Layout



1. In this activity, students will complete a draft design of their store layout in groups before voting for their top choice as a class.
2. Provide students with options for completing their store layout designs based on available resources (computer/smartphone apps or paper sketches).
3. Break students into groups of 3–5 and direct them to the **Design Your Store Layout** activity in their **Pop-Up Planners** on page 40.
4. Review the activity's instructions and point out that they need to include a check-out area (cash register), product displays, and tables. Point out any limitations (e.g., if you know additional lighting is unavailable).
5. Remind students that the Optional Items are just idea starters. Students can add anything they would like to include. Encourage them to note inspirational ideas in the margins.

... Use the information you know about your store location, product, and market research to design a draft of your pop-up store's layout. Keep your target audience in mind.

6. Time permitting, point students to the articles about pop-up shop layout in the **Store Layout Inspirations** section of their **Pop-Up Planners** on page 39. Tell them they can read the articles to get inspirational ideas.
7. Show students an example of a store layout. This layout is in a school cafeteria. This is just to help them visualize the activity. The same example is provided in their **Pop-Up Planners** on page 41.







## Debrief: Pick a Final Design



1. Once each group has a design sketch, reconvene as a class to vote on a layout.
2. Display paper sketches on the whiteboard or easel. For digital layouts, instruct students to email them to your computer so you can display them on the projection unit.
3. Request a volunteer from each group to share the group's design with the class, highlighting the key elements.
4. Once all the designs have been presented, ask students to vote openly for their favorite layout. Alternatively, the class can pull elements they like from each design to come up with a new, combined layout.
5. By the end of the activity, students will have decided upon a store layout. Share the selected layout electronically, or allow students to take pictures or copy the layout in their **Pop-Up Planners** on page 42.



## Wrap-Up



Review the key takeaways:

- Store layout and product placement help sell products.
- Be creative and use what you know about your target audience.
- Design a store that will attract your target audience's attention and draw them in!



## Action Items



Review the action items that students must complete before the next meeting:

- Complete store layout sketches if students do not complete them in class.
- Instruct students to complete the Post-meeting survey.



# Meeting Five: Creating the Buzz

## OVERVIEW

This meeting focuses on selecting a price for the product or service, as well as promotional strategies for attracting attention to the pop-up store. Students will determine their expenses and the revenue necessary to break even so that they can set a price for their product that will achieve their profit goal. Additionally, they will determine how to promote their business and will work on tasks for advertising.

## MEETING PREPARATION AND MATERIALS

Before the meeting, do the following:

- ☐ Review the Detailed Topic Guide to determine what topics and activities you will include during the meeting. Recommended topics and activities are noted as “Required.”
- ☐ Review all the activities and materials, including the onscreen presentation and student materials.
- ☐ Open and preview any videos and websites used in the activities.
- ☐ Review any notes specific to the meeting’s activities to determine how to conduct them. Determine whether there are any optional activities you want to incorporate during the meeting time or instruct students to complete on their own time.
- ☐ Determine how best to organize students to complete the activities (small groups, station rotation, flipped classroom model, whole class, etc.).
- ☐ Distribute the students’ **Pop-Up Planners**. Collect the students’ Planners at the end of each meeting and distribute them at the beginning of each meeting if you are in an in-person, face-to-face learning environment. Instruct students to save their **Pop-Up Planners** in a convenient location on their computers to access during each session, if you are in a remote, virtual learning environment.

## MATERIALS ACCESS

Digital versions of student materials and the onscreen presentations can be accessed from JA Connect, the JA Learning Platform.

- If you are projecting the materials, practice navigating and using the interactive features.



## DETAILED TOPIC GUIDE

The following guide provides a closer look at each of the topics in Meeting Five. All topics and activities presented in this table flow in sequential order. All activities in this meeting are instructor-led.

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
4.1 The Four Ps of Marketing	<b>5.1 Pinpointing the Price (20 minutes)</b>  Students will use information about expenses and target audience data to calculate a price point for their product that will achieve their profit goal.  <b>Students will:</b> <ul style="list-style-type: none"> <li>Formulate the appropriate price for their product to achieve the pop-up store's monetary goal.</li> </ul>	<b>Required Activity: The Price Is Right</b>  As a class, they will work through several calculations to reach a price point for the product or service.  <b>Activity Notes:</b>  The cost of goods and any operating costs for the business (based on vendor prices or preset decisions made about the pop-up business) need to be given to students during the activity.	<b>Pop-Up Planner</b>  <b>Pop-Up Financials</b> workbook	20 minutes

(continued)



(continues)

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
4.1 The Four Ps of Marketing	<p><b>5.2 Promotion in Motion (25 minutes)</b></p> <p>Students learn about promotional strategies and determine the best strategies for their pop-up.</p> <p><b>Students will:</b></p> <ul style="list-style-type: none"> <li>Devise promotional strategies and materials to attract interest to the pop-up business.</li> </ul>	<p><b>Required Activity: Plan Your Promotion</b></p> <p>Students determine appropriate marketing strategies for their pop-up and devise a plan for creating marketing materials.</p> <p><b>Activity Notes:</b></p> <ul style="list-style-type: none"> <li>Familiarize yourself with any organizational guidelines related to marketing strategies. For example, if students will be using social media to promote their business, familiarize yourself with the organization's social media guidelines so you can inform students of their parameters. Some things to look for include language usage, photo restrictions, account access, privacy settings, etc.</li> <li>If social media accounts will be used, make sure that you act as administrator and make posts on the students' behalf.</li> </ul>	<b>Pop-Up Planner</b>	25 minutes





*Welcome students to Meeting Five.*

## 5.1 PINPOINTING THE PRICE

20 MINUTES ⌚



### Objectives



By the end of this learning topic, students will be able to:

- Formulate the appropriate price for their product to achieve the pop-up store's monetary goal.



### Warm-Up: What Would You Pay?



1. Tell students to think about their own shopping experiences for a moment, specifically with respect to back-to-school shopping.
  - ? **How much would you spend on a new backpack? \$30? \$50? \$100?**  
*There is no wrong answer; the goal is to hear a diverse view of pricing preferences.*
2. Ask for a few student volunteers to give their answers. Keep these short and aim to get a good amount of student suggestions to show the different financial opinions customers have.
  - ... **Customers are very aware of their money. Just like you, they make decisions based on price and what they are willing to pay. As a pop-up entrepreneur, you need to price your products appropriately to encourage customers to buy them.**
3. Tell students that they also need to consider the business factors that influence the price they set.
  - ? **Think about . . . what do you need to bring in as revenue in order to cover your costs and make a profit?**



There are several factors to consider when determining the perfect product price.



Share a time when you had to set a price for a product or service and the factors that you had to consider. Or, share a time when you experienced a price that was set too high or too low and the anticipated consequences of it.



## Discuss: Concise Steps to a Price



There are four steps to pricing your product:

- Calculate your total expenses.
- Determine your total expected revenue.
- Review your market research to get your target audience's feedback on price.
- Calculate a price point.

1. Explain that the class will work together through the price calculations.

### INSTRUCTOR NOTE:

You will need to give students the information about expenses incurred with vendors and other preset business operations. This includes any inventory numbers that are set based on allotted budget. As students come up with an expense, provide them the amount of the associated expense.



For Step 1, we need to calculate the total expenses our pop-up business will incur.

2. Direct students to **Step 1: Calculate Total Expenses** in **The Price Is Right** section of the **Pop-Up Planner** on page 44. They will also need access to the **Pop-Up Financials** workbook to do some calculations. (Students can access the worksheets themselves and follow along, or you can project them on a screen and use the worksheets together as a class.)
3. Explain that total expenses are calculated using the following formula:  

$$\text{Total Cost of Goods} + \text{Operating Costs} = \text{Total Expenses}$$



4. As a group, identify all the expenses the pop-up business might incur. Remind students that the definitions for fixed and variable expenses were discussed in an earlier meeting and can be found in their **Pop-Up Planners** on page 13.
5. Instruct students to record the expenses in the **Expenses** worksheet of the **Pop-Up Financials** workbook. You should also record them on the worksheet you are projecting for the class or on a board/easel. Students should sort expenses into fixed and variable expenses.
6. Go through each component of the equation for calculating total expenses.
  - **Cost of goods** – the cost of making the goods sold by a business, including materials and labor directly used to create the goods
    - For a product, this includes purchasing the product from the vendor. You should also factor in things like shipping costs (to get the product from the vendor) or printing costs (for example, if you are printing a design on merchandise).
    - For an event, think about the cost of printing tickets, renting equipment, or paying entertainment.

**INSTRUCTOR NOTE:**

Based on the allotted budget for product inventory, share the cost per unit with students so they can calculate the total number of items ordered and total cost of goods.

- **Operating costs** – the total of all expenses needed to run a business
  - For example, operating costs can include promotional supplies for signs/posters/flyers, advertising costs, utilities (electricity or WiFi to run the pop-up store or to run the event).

**INSTRUCTOR NOTE:**

Provide estimates for students to plug into the worksheet for anything that can't be calculated accurately right now.

**Have we thought of all the possible expenses?**

*Encourage students to think for a moment about possible expenses that haven't been discussed. If the class feels that the list is complete, move on. If they missed any expenses you have incurred, provide them to the class to add to their worksheet.*



... Notice the total expenses have now been calculated in the Expenses worksheet. That amount is our total expenses to run the pop-up business.

... In Step 2, we need to determine what our total expected revenue will be.



7. Point students to **Step 2: Determine Total Expected Revenue** on page 44 in the **Pop-Up Planner**.

? What will make up the total expected revenue for the business?

*Answers should include: total product sales (ideally, enough sales to cover the cost of expenses)*

... Look at the expenses first to understand how much money you need to make. That is the minimum amount of money you need to bring in as revenue to cover your expenses.

? What is the name of that point when your revenue is equal to your expenses?

*The breakeven point; there is no profit or loss*

... Remember, in order to break even, your revenue must exceed your total expenses. Only after you make this amount in sales can you start to earn a profit.

8. Instruct students to record the total expenses from the **Expenses** worksheet in the breakeven point on the graphic in their **Pop-Up Planner**.

... That breakeven amount is a good visual reminder of how much you need to earn in revenue to start making a profit.

... Your profit goal is the amount you want to earn. In order to achieve that number, you first have to ensure you've covered your expenses, so you don't experience a loss.

9. Instruct students to write the **Profit Goal** they originally set (on page 2 in the **Pop-Up Planner**) in the space beside the breakeven point graphic.

... Using the information in your **Pop-Up Planners**, take a moment to calculate what you believe is your total expected revenue.

10. Give students a moment to work on the numbers. Ask for volunteers to share what they believe the total expected revenue is. Once the class agrees, instruct students to record the total expected revenue number in the **Pop-Up Planner**.





For Step 3, we need to review the price data collected during market research.

**11. Point students to the next step in the **Pop-Up Planner – Step 3: Review Market Research for Price Data.****

So far, your calculations have been based on numbers and facts—and that's given us a great starting point to work from. But in order for the pop-up business to be successful, your customers have to be willing to pay the price you're setting. You need to factor in your customers' "voice" to set a fair and reasonable price.

**12. Instruct students to take a few minutes to go back and review the market research information they recorded in their **Pop-Up Planners** on pages 25–26. Then, they should complete Step 3 in their **Pop-Up Planners** on page 45.**

**13. Reconvene the class after a few minutes.**

**14. Ask for volunteers to share what they discovered from their market research review. Record the various results of their market research on the board so that students have a sense of their target audience's preferred price range.**



**15. Take a moment to refer students back to the list of entrepreneurial characteristics on page 5 of their **Pop-Up Planners**. Point out the *decisive* characteristic.**

A successful entrepreneur makes informed decisions in a timely manner. As entrepreneurs for your pop-up business, you need to look at and weigh the options to make the best decision for your situation.

Now it's time to be decisive and use the information from your market research to pin down a reasonable price range for your product or service.

? Based on the pricing information you've discovered, what do you think a reasonable price range is?

*Answers will vary based on students' market research.*

**16. Capture different prices, if there are different answers, on the board or easel. Come to an agreement as a class and remind students that they are simply coming up with a price range right now—they will nail down the actual price in the next step.**



17. Instruct students to record the price range in the **Pop-Up Planner** on page 45.

- ... Assessing your price range is key to making an informed decision.
- ... If you think you can sell your product at a higher price, you will increase your profit margin and, ultimately, the proceeds you donate to your cause.
- ... Keep in mind, though, if sales are slow, you want to plan in advance when and how you will lower your price. Also, if you have leftover product in stock toward the end of the pop-up store's duration, plan in advance what discounted price you might use to clear out your inventory and maximize your profits.
- ... Finally, in Step 4, you need to determine the price point you want to charge.



18. Point students to **Step 4: Calculate the Price Point** on page 45 of the **Pop-Up Planner**.

- ... Now it's just a matter of "playing with the numbers"—using trial and error to figure out what price point will achieve the proper balance between your desired profit and the customers' desired price.



Share any tips or tricks from your own experience that students can use to figure out a price.

19. Direct students to the **Price Calculator** worksheet in the **Pop-Up Financials** workbook.

- You can complete this step as a class. Project the worksheet on a screen, and practice plugging in different numbers with the students.
- If students have their own devices, they can access the worksheet and play with the numbers for several minutes to come up with ideas for a price point.
  - If you already have an allotted budget and know how much inventory you can purchase, give students the Number of Units figure. If there is no set inventory yet, students can play with both the price and the number of units to find an optimal calculation.

20. Students should record each price they try and the total expected revenue in the **Pop-Up Planner**. Encourage them to try several different number combinations.





## Debrief: Price Your Product



1. Ask students to volunteer the price point they would recommend, along with the thought process that led them to their decision.
2. Write the suggested price points and projected revenue on the board as students provide them.
3. Conduct a class poll to vote on a price.
4. When the votes have been tallied, have students write down the **Final Price** in their **Pop-Up Planners**.



## Wrap-Up: Making a Profit



Review the key takeaways:

- Price calculations rely on data for the total cost of goods, operating costs, and total expected revenue.
- Identify a price that strikes a balance between your business's goals and the customers' preferences.
- Be decisive! A price is part math and part good decision making.
- Don't be afraid to sell leftover units at a discounted price at the end of the pop-up store's duration. Every bit counts!



## 5.2 PROMOTION IN MOTION

25 MINUTES 



### Objectives




By the end of this learning topic, students will be able to:

- Design promotional strategies and materials to attract interest in the pop-up business.

### Explore: Place




 Promotion is the way you get your customers' attention, create awareness, and persuade them to buy a product or service.

Direct students to write the key aspects of promotion under the *promotion* definition on page 47 of their **Pop-Up Planners**: “captures attention,” “creates awareness,” and “persuades.”

### Discuss: Promote Like a Pro




 How many of you have ever bought something that you saw online first?

*There are no wrong answers but ask for a few volunteers to share where they saw the advertisement (e.g., Facebook, Google, Instagram, etc.).*

 Many companies use a social media marketing strategy. Facebook, Twitter, and Instagram all reach a variety of users and different target audiences. Promoting on those tools can result in a big payoff for businesses!


1. Explain that social media is just one promotion strategy that can be used to reach potential customers.

 The bottom line is that you need to find the most effective strategy to reach your target audience.





2. Introduce the four main categories for promotional strategies: print, digital, word-of-mouth, and social media.
  3. Give students the definition for each promotional type and ask them to think of as many examples as they can for that type of promotional strategy. They should call out examples for 30 seconds as you record them on a board or easel. Do the same for each of the promotional strategies.
    - *Print* – physically printed materials that convey information  
*Answers will vary but should include signs, posters, billboards, fliers, brochures, mailers, magazines, banners, newspapers, stickers, invitations*
    - *Digital* – computer or Internet-based technologies that convey information  
*Answers will vary but should include emails, texts, a website, YouTube, search engines, Yelp, radio*
    - *Word-of-mouth* – oral or written recommendations by a satisfied customer  
*Answers will vary but should include school announcements, online reviews, talking to friends and family, Facebook posts*
    - *Social media* – websites and apps that allow people to share information on social networks  
*Answers will vary but should include a company's Facebook page, Twitter, Instagram, SnapChat, blogs, vlogs, videos, pictures*
- While social media is in fact part of “digital,” it is important to call out this method specifically. Social media is a very popular way to attract attention and advertise, because so many customers use social media in their daily lives.
4. After you have recorded examples for each promotional type, review them as a group and ask the class if there are any that they feel don't belong in a given category. Move or remove any that they think are incorrect.
  5. Instruct students to record these examples in the **Promotional Strategies** section on page 47 of the **Pop-Up Planner**.
 

 Share an example from your own experience of a time when you successfully implemented one of these marketing strategies. Describe your decision process and what you did.





6. Provide some tips to consider when selecting a promotional strategy:

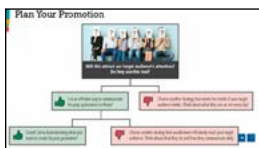
- **Make sure the important information is the central focus** of your strategy—dates, times, place, worthy cause.
- Post information (print or digital) where you know the **target audience will see or hear it**.
- **Create the buzz early**—talk to people, answer questions, count down to the event.
- **Time your strategies for maximum impact**—decide which strategies are the most effective and at which times (e.g., posters several weeks before the pop-up store; morning announcements for the week leading up to the store's opening).

7. Refer students back to the list of entrepreneurial characteristics on page 5 of their **Pop-Up Planners**. Point out the *risk-taker* characteristic.

... **Successful entrepreneurs take calculated risks for their business. Use what you know about your target audience to take a chance and try something daring. Try to create something that captures your customers' attention! Think outside the box with catchy sayings, a special bulk price, or a promised (safe!) stunt if you reach your profit goal!**



## Activity: Plan Your Promotion



In this activity, students will discuss and determine promotional strategies for their pop-up business.

1. Divide the class into groups of 4–5 people. If you have multiple target audience groups, you can assign a target audience to each group.
2. Direct students back to the **Promotional Strategies** activity in their **Pop-Up Planners**.
3. Instruct students to work through the types of promotions they discussed earlier. The objective is to narrow down the promotional strategies to the ones they think will be most effective in promoting their business. Students should:
  - Cross off a strategy immediately if they don't think it is applicable to the target audience.
  - Weigh the pros and cons of each strategy they brainstormed. (Remind them to think about their target audience, not just what they find interesting. For example, it wouldn't make sense to use printed flyers in a virtual setting.)



- Use the flowchart in the **Plan Your Promotion** section of the **Pop-Up Planner** to make decisions.
  - Circle the strategies in the **Promotional Strategies** table that they think will be most effective. They should choose no more than 3–5 strategies total.
4. Give groups 5–10 minutes to select their top 3–5 promotional strategy choices.
  5. Point out that they can use multiple strategies, depending on what best fits their audience. Note that you should provide any guidelines or rules the organization/school has for the selected marketing strategies (for example, if students can only use the organization/school website, or if students cannot share photos of themselves online). Make sure students are aware of any limitations that will affect the content they create.



## Debrief: Plan Your Promotion



1. Reconvene as a class and ask for a volunteer from each group to share the group's top choices. Note the strategies for different target audience groups, if applicable.
2. Poll the class for suggestions for final choices for promotional strategies.
3. Instruct students to record the **Final Strategies and Tasks** in their **Pop-Up Planners** on page 49.



## Wrap-Up: Promoting Your Pop-Up



- Now that the promotional strategies have been selected, decisions need to be made about what information to convey and where and when to advertise.

Review the key takeaways:

- An effective promotional strategy sparks interest and gets customers into your store.
- Take a calculated risk and try something new and catchy!





## Action Items



Depending on students' ability to complete tasks outside of class, the following action items should be completed before Meeting Six.

- Instruct the Marketing group to work on a promotion plan and assign tasks to the team.
- Time permitting, students can begin working on promotional materials. This task can be extended to additional class periods or outside of class.
  - Students should prepare promotional materials, such as posters, flyers, invitations, social media posts, etc., with a plan for execution in the time leading up to the store launch.
- Point out that there are reference articles noted in the **Pop-Up Planner** on page 49 that students can use for further research on promotional strategies.
- Instruct students to complete the Post-meeting survey.



# Meeting Six: Open for Business!

## OVERVIEW

In this meeting, students explore essential customer service and sales skills to use while their pop-up store is operating. Additionally, they review and finalize all logistics necessary to launch and open the store.

## MEETING PREPARATION AND MATERIALS

Before the meeting, do the following:

- ☐ Review the Detailed Topic Guide to determine what topics and activities you will include during the meeting. Recommended topics and activities are noted as “Required.”
- ☐ Review all the activities, videos, and materials, including the onscreen presentation and student materials, as noted in the Detailed Topic Guide.
- ☐ Review any notes specific to the meeting’s activities to determine how to conduct them. Determine whether you will incorporate any optional activities during the meeting time or if there are any that you will instruct students to complete on their own time.
- ☐ Determine how best to organize students to complete the activities (small groups, station rotation, flipped classroom model, whole class, etc.).
- ☐ Distribute the students’ **Pop-Up Planners**. Collect the students’ Planners at the end of each meeting and distribute them at the beginning of each meeting if you are in an in-person, face-to-face learning environment. Instruct students to save their **Pop-Up Planners** in a convenient location on their computers to access during each session, if you are in a remote, virtual learning environment.

## MATERIALS ACCESS

Digital versions of student materials and the onscreen presentations can be accessed from JA Connect, the JA Learning Platform.

- If you are projecting the materials, practice navigating and using the interactive features.



## DETAILED TOPIC GUIDE

The following guide provides a closer look at each of the topics in Meeting Six. All topics and activities presented in this table flow in sequential order. All activities in this session are instructor-led.

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
2.2 It's All about the Customer  5.2 Promotion in Motion	<b>6.1 Customer Care &amp; Sales Flair</b> <b>(25–30 minutes)</b> Students explore customer service and sales strategies through role-play scenarios. <b>Students will:</b> <ul style="list-style-type: none"> <li>• Select appropriate sales strategies to use while interacting with customers during pop-up store sales.</li> <li>• Practice excellent retail customer care skills to maximize the pop-up store's sales potential to reach its business goals.</li> </ul>	<b>Required Activity: Customer Interaction Role-Plays</b> Students enact real-life sales scenarios, rotating between customer, salesperson, and observer roles. <b>Activity Notes:</b> Students will act out three scenarios. Before the meeting, write (or print) multiple copies of each scenario on separate pieces of paper. Fold up the papers so students can't read them ahead of time, and group them in sets of three (customer, salesperson, observer) to hand out to groups during class.	<b>Pop-Up Planner</b> Scenarios	15–20 minutes
3.3 Pop-Up Planning	<b>6.2 Launch Logistics</b> <b>(20 minutes)</b> Students discuss the remaining pop-up logistics and come to decisions on any outstanding items. <b>Students will:</b> <ul style="list-style-type: none"> <li>• Resolve final logistics before launching the pop-up business, including transaction types, starting cash, inventory tracking, and staffing schedule.</li> </ul>	none	<b>Pop-Up Planner</b> <b>Sales Tracking</b> document	20 minutes





*Welcome students to Meeting Six.*

## 6.1 CUSTOMER CARE & SALES FLAIR

25-30 MINUTES ⌚



### Objectives



By the end of this learning topic, students will be able to:

- Select appropriate sales strategies to use while interacting with customers during pop-up store sales.
- Practice excellent retail customer care skills to maximize the pop-up store's sales potential to reach its business goals.

### Warm-Up: Good Customer Experience



☰ Take a moment to think about your own shopping experiences. What did a store employee do or say that was helpful or pleasant? Write down all the things that a store employee does when you're shopping that you like. Maybe you like it when they greet you at the door or when they ask you if you need additional sizes while you're in the dressing room.

1. Instruct students to brainstorm for a minute and write down anything that has contributed to a positive shopping experience with a store employee. Students should record their notes in the **Good Customer Experience** section of their **Pop-Up Planner** on page 52.
2. Ask for student volunteers to share a few of the things they wrote with the class.





Share an experience you've had as a customer that impacted the way you conduct business or something you've done to offer great service.

3. Now, tell students to shift their thinking from the customer's point of view to the employee's point of view.
  - ? Think about the interaction you described in the examples you gave. Did you become more loyal customers because of that experience?
  - ... These interactions are two-sided: there's a customer and a salesperson. As an entrepreneur, you'll be the one taking care of the customer. Use your experience as a customer to guide your actions when working in the pop-up store. Give your customers the best experience possible!



## Discuss: Customer Care and Sales Strategies

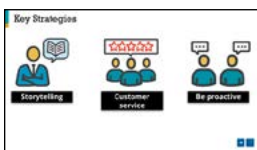


1. Explain that there is a proven connection between good customer service and making sales.
  - ... Interactions like the ones you just shared shape the customer experience. Interactions—both good and bad—can ultimately impact the sales you make and the customers you gain. The more positive interactions you have with customers, the better service you provide and the more sales you make.
2. Differentiate between *customer care* and *sales*, and establish the connection between them:
  - **Customer care** is attending to customers' needs to ensure their satisfaction and delight with a product or business.
  - **Sales** is ultimately the exchange of money for a product or service.
  - ? **How are the two connected?**  
*Good customer care builds a relationship between the salesperson and the customer to help "close the sale" and create repeat business or positive referrals.*
3. Point students to the definitions in the **Pop-Up Planner** on page 52 and tell them to write down the connection. It is important for them to understand the connection for a successful pop-up store experience.



4. Explain that customer care is fairly easy. Tell students to start with the basics—treat people the way you would like to be treated if you were the customer. Be positive, kind, attentive, and go the extra mile to help the customer out!
5. Direct students to the list of **Customer Care and Sales Strategies** in their **Pop-Up Planner** on page 53 and review the list. You may have students read each strategy aloud for the entire class or give them a few minutes to read through each on their own.

... This list of strategies should guide your customer interactions when you are open for business.



6. Highlight a few key strategies:

- Use storytelling to appeal to your customers.

... Tell customers about the worthy cause your store's profits will benefit, which is a great way to connect with them.

- Train every employee in customer service.

... Make sure each employee knows these strategies. Every team member should be able to provide a good customer experience, no matter what their role is on the team.

- Be proactive.

... Approach customers to help them; don't wait for them to ask for help. Make eye contact and be attentive to their needs. Be helpful, not pushy!



7. Refer students back to the list of entrepreneurial characteristics on page 5 of their **Pop-Up Planners**. Point out the *adaptable*, *persevering*, and *problem-solver* characteristics.

... Successful entrepreneurs can handle any situation thrown their way. They are adaptable and adjust easily to new requirements.

- If you run out of the shirt size a customer needs, check your inventory, or see if you will be ordering more. Offer to call the customer when the shirt comes in. Don't let the sale just walk away.
- If you run out of the proper change, send a team member to get more cash from the front office.

... Successful entrepreneurs persevere and push through changes, problems, and failures.

- If the store is not getting much traffic, print fliers and go talk to your customers to drive people into the store!



- ... Successful entrepreneurs are problem-solvers, and they look for the best solution to a problem.
  - If the ink doesn't print correctly on the tickets you are selling, hand write the information on the ticket, and initial it to make it authentic. Think outside the box to come up with a creative solution to the problem!
- ... With these characteristics, you are ready for any scenario! You can make any interaction a positive customer experience.



## Activity: Customer Interaction Role-Plays



1. For this activity, divide the class into groups of three. Have them count off (1, 2, 3), establish their own groups, or split them up some other way you choose. Each group will have three scenarios to complete; each round, students will rotate playing the role of customer, salesperson, and observer.
2. Each group should assign roles to members. These roles will rotate for each scenario, so every student will get to play every role (time permitting). Students may decide among themselves, draw from a hat, or use another option of your choosing.

- ... The objective of this activity is for you to practice good customer care and sales strategies. You will be given three scenarios to complete. Each round, one person will be the customer, one person will be the salesperson, and one person will be the observer.

3. Explain the roles to the students:
  - **Customer** – The customer randomly picks the scenario and leads the role play. The customer is the only team member who knows the scenario and must act it out appropriately for the salesperson to respond to.
- ... The customer picks the scenario and acts it out. He or she is the only person who knows how the role-play will go. The customer's job is to challenge the salesperson to think quickly, adapt, and ultimately, make the sale!
- **Salesperson** – The staff member reacts to the customer. The salesperson is unaware of the scenario in advance and must use the list of strategies to practice customer service and sales.



... The salesperson's goal is to close the sale. You need to practice good customer care skills and sales strategies to create a positive customer experience. Get ready to handle whatever the customer sends your way!

- **Observer** – The observer is not actively involved in the role-play but watches and takes notes in the **Observer Notes** section of the **Pop-Up Planner** on page 56. The observer will lead the debrief, point out things that went well, and offer suggestions.

... The observer watches, listens, and takes notes. Your job is to think about the customer care and sales strategies and to jot down notes about what the salesperson did well and what could be improved. At the end of the round, you will provide feedback to the salesperson.

4. Give each team a set of three scenarios (which you prepared before the meeting) and ask them to distribute one scenario to each team member. Remind students that they should not share their scenario but keep it to themselves until it's their turn.

... Before you start the role-play, the customer needs to tell the other two people what the product or service is, so the salesperson knows what he or she is selling.

- **Scenario 1: The Impatient Customer**

- **Product:** raffle tickets
- You have decided to buy 10 raffle tickets. You're standing in line at lunch to see the prize options and pay for the tickets, but the line is so slow! You're getting annoyed that it's taking up your lunch time, and you don't feel like waiting anymore.

- **Scenario 2: The Dissatisfied Customer**

- **Product:** T-shirts
- You buy a T-shirt from the pop-up store, but when you try it on at home, it fits horribly, clinging in all the wrong places! You bring it back and want the issue fixed. You are very unhappy and dissatisfied with your purchase.

- **Scenario 3: The Indecisive Customer**

- **Product:** tote bags
- You are thinking about buying a tote bag. You like the product and the design but don't know if you want to pay that much for it. Or maybe you should go back and look at that first design? There are just too many choices! You go back and forth but just can't make up your mind!



5. Tell groups that they have 2–3 minutes to act out each scenario and debrief (about 2 minutes for the role-play and 1 minute for the observer's feedback). Once time is up, students must stop their role-play or debrief and move on to the next round.
6. Set a timer and alert students when it's time to stop, switch roles, debrief, etc.
7. Time permitting, groups should work through all three scenarios.



## Debrief: Customer Interaction Role-Plays



1. Bring the class back together to review observer information and to share what the groups learned.
  2. Go through each scenario one at a time so that all students are discussing the same scenario, and ask for student volunteers to share their thoughts on any of the following questions (it can be anyone from the group, not just the observer):
    - What went well?
    - What didn't go so well?
    - What strategies did you apply?
    - What strategies would have been beneficial to use?
    - What will you do differently next time?
- Now that you've explored some possible customer scenarios you could face, use these experiences when you launch the store.
- Refer back to these strategies as needed and be sure to implement them when interacting with your customers.



## Wrap-Up: The Customer Experience



Review the key takeaways:

- Customer care and honest and helpful sales strategies make or break a customer experience.
- Training all team members on these strategies will get them on the same page to deliver the best experience!
- Consciously choose strategies that work best for you to be successful.



## 6.2 LAUNCH LOGISTICS

20 MINUTES ⌚



### Objectives



By the end of this learning topic, students will be able to:

- Resolve final logistics before launching the pop-up business, including transaction types, starting cash, inventory tracking, and staffing schedule.

#### INSTRUCTOR NOTE:

Items that need attention will vary for this topic based on the class's pop-up experience and when and how they've addressed details to date. This topic is intended to be the last stop to address issues before opening the store. **Ensure the class has attended to everything to launch the business before advancing past this meeting!**



### Explore: Final Logistics



1. Direct students to the **Launch Logistics** section of their **Pop-Up Planner** on page 56. Students should follow along and use it as a guide to finalize any outstanding items and make appropriate determinations for the pop-up launch.
  - Take a look at what's left to take care of or decide upon before the pop-up launch. These are all important details that need to be covered before you can open for business.
2. These are some final logistics that students should attend to before the store opens. Skip any slides that have already been completed by the class.



## Discuss



### Checkout Options

1. Discuss options for the types of transactions that will best suit the customers.
  - Some options to consider are:
    - Mobile checkouts around the store (with iPads, phones, card readers, etc.)
    - Stationary checkouts (with cash boxes, cash register, card readers, etc.)

It doesn't matter if the checkout is basic or more technical—the objective is to ensure you have a plan for checkout that works efficiently and easily.
2. Review other tools that they should include with their checkout stations. Items can include calculators, pen and paper, screen cleaner (for tablets), etc.
3. Remind students to go back to their pop-up store sketch in their **Pop-Up Planner** on page 42. They may have already determined where the checkout should be when they drew the store layout.



### Accepted Payment Methods

#### INSTRUCTOR NOTE:

If there are limitations for the payment methods that can be accepted (e.g., no credit card readers), let students know up front so that they understand what is not an option.

4. Next, work with students to identify payment methods they will accept, based on how they will complete transactions.
 

What payment methods do you think your customers are most comfortable with?

  - Some options to consider are:
    - Cash
    - Credit cards
    - Electronic payments (PayPal, Apple Pay, Venmo, etc.)
    - Check



... Make sure you also consider how many options are needed to maximize sales. You don't want to lose sales because you have limited your payment options.

... Also, think about backup plans. Figure them out now so that the team is prepared if something happens.

- What if you run out of cash or proper cash denominations to make change?
- What if the Internet goes down or card readers aren't working?



Share a time when you experienced a payment issue, either as a customer or salesperson, and what was done as a backup plan.

5. Depending on the options selected, make sure students also think about the tasks associated with those decisions. You will need to supply them with certain information and set up the logistics for accounts, starting cash, etc.
    - Cash
      - How will the cash be collected and stored?
      - How much money will you start with? (Students need to record starting cash on the **Profit** worksheet.)
    - Credit cards
      - Which credit card types will you accept? (Visa, MasterCard, American Express, Discover)
      - How many card readers are available?
      - What is your backup plan if the Internet or credit card machines are down?
    - Electronic payments (PayPal, Apple Pay, Venmo, etc.)
      - Which payment vendors will you use?
      - What account do the payments get sent to?
    - Checks
      - To whom should checks be made payable?
- ... You should make signs for checkout that communicate your payment options, credit cards or electronic payment vendors accepted, to whom checks should be made payable, etc. The signs will keep customers informed and will speed up checkout!
- ... Post an identical sign at the entrance to the pop-up store so that customers won't waste their time standing in line, only to learn at the end that they need a different form of payment.





## Inventory

6. Discuss the importance of taking inventory before the pop-up store launches. This should include:
    - Product quality assurance (QA) – ensure that there are no product flaws; work with the vendor on any issues.
    - When to complete inventory counts before pop-up launch.
    - Recording the starting inventory numbers and itemizing them on the **Sales Tracking** document.
- ... Knowing your inventory is important before, during, and after your business operations. This information helps you with customer care (for example, whether more product should be ordered) and financials (at the end, when you calculate total unit sales).

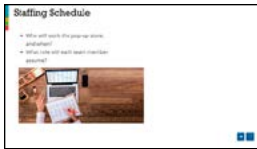


## Sales Tracking


- ... You want to keep accurate records of how much of each product you've sold. The easiest way to do that is to use the Sales Tracking sheet that you keep in the store, probably right by the checkout area. Each salesperson should place a tick mark beside each product they sell as they sell it – it's that simple!
7. Explain to students that the information they gather will be used after the store closes to calculate final sales numbers.
  8. Distribute or instruct students to download the **Sales Tracking** document. They will use this document to create tick marks during sales.
 

... Use the Sales Tracking document to keep track of your sales as they occur. Keep this document beside the checkout so that each team member remembers to do it with every sale. If you have multiple checkout locations, have enough copies of this sheet to keep tracking accurate.
  9. Point out that itemizing product details (such as different design options or apparel sizes) will provide accurate sales information as well as information for potential inventory reordering, if your store might restock at some point.





## Staffing Schedule

10. Discuss how you will staff the store during the days and times it will be open. Creating a staffing schedule ahead of launch will save students the headache of last-minute staffing issues.
  - Determine shifts – how long do they last?
  - Determine roles – floor salespeople, checkout, swing staff (to cover miscellaneous tasks or cover where needed), etc.
-  Draft a staffing schedule so everyone can sign up for time slots and tasks. Discuss how your team will be most effective in the various roles.
11. Encourage students to publish the schedule so that everyone has access to it (e.g., email a copy, publish it on a site, print copies).
12. If there are additional launch items that your class needs to address, ensure they do it now before the store opens.



## Wrap-Up: Next Step: Launch Time!



Review the key takeaways:

- Get your supplies organized and your tasks finalized.
- You are now ready to open your pop-up doors and start selling!



## Action Items



The following action items should be completed before Meeting Seven.

- Instruct students to fill out the **Sales Tracking** document as they complete sales in the store. This information will be needed for closing out the pop-up business.
- Instruct students to complete the Post-meeting survey.



# Meeting Seven: Pop-Up Wrap-Up

## OVERVIEW

This meeting guides students through the final tasks necessary to close the pop-up business, reconcile the finances, and determine the business's final profit. Students will use the final metrics and the intangible lessons they learned to discuss best practices for future businesses and to assess whether they achieved their business and personal goals. Finally, students deliver the pop-up store's proceeds to their charitable recipient and celebrate their accomplishments.

## MEETING PREPARATION AND MATERIALS

Before the meeting, do the following:

- ☐ Review the Detailed Topic Guide to determine what topics and activities you will include during the meeting. Recommended topics and activities are noted as "Required."
- ☐ Review all the activities, videos, and materials, including the onscreen presentation and student materials, as noted in the Detailed Topic Guide.
- ☐ Review any notes specific to the meeting's activities to determine how to conduct them. Determine whether you will incorporate any optional activities during the meeting time or if there are any that you will instruct students to complete on their own time.
- ☐ Determine how best to organize students to complete the activities (small groups, station rotation, flipped classroom model, whole class, etc.).
- ☐ Distribute the students' **Pop-Up Planners**. Collect the students' Planners at the end of each meeting and distribute them at the beginning of each meeting if you are in an in-person, face-to-face learning environment. Instruct students to save their Pop-Up Planners in a convenient location on their computers to access during each session, if you are in a remote, virtual learning environment.
- ☐ Make sure to sign the **Certificate of Achievement** for each student.

## MATERIALS ACCESS

Digital versions of student materials and the onscreen presentations can be accessed from JA Connect, the JA Learning Platform.

- If you are projecting the materials, practice navigating and using the interactive features.



## DETAILED TOPIC GUIDE

The following guide provides a closer look at each of the topics in Meeting Seven. All topics and activities presented in this table flow in sequential order. All activities in this meeting are instructor-led.

Prerequisites	Topic and Learning Objectives	Activities	Materials	Estimated Activity Duration
6.2 Launch Logistics	<b>7.1 Pop-Up Closeout (30 minutes)</b> Students complete inventory reconciliation, cash reconciliation, and profit calculations and decide on logistics for distributing their proceeds. <b>Students will:</b> <ul style="list-style-type: none"> <li>Complete the tasks to calculate final sales and profit and close out the business.</li> </ul>	<b>Required Activity:</b> Students perform close-out tasks to determine the pop-up business's final financials and profit. <b>Activity Notes:</b> Sharing information about sales tax with the class and collecting it is the facilitator's responsibility. The facilitator is also responsible for reconciling the starting cash once students separate it from their revenue. Those tasks must be completed based on your school's finance guidelines.	<b>Pop-Up Planner</b> <b>Pop-Up Financials</b> workbook	30 minutes
none	<b>7.2 Measuring Pop-Up Success (15 minutes)</b> Students review their data to measure their success and reflect on their pop-up experience. <b>Students will:</b> <ul style="list-style-type: none"> <li>Analyze final sales information and compare it to the pop-up business's initial profit goal.</li> <li>Assess company and personal goals to determine successes and areas for improvement.</li> </ul>	<b>Required Activity:</b> Students will assess the pop-up business's final metrics against the company and personal goals they initially set in order to determine accomplishments and reflect on the program experience.	<b>Pop-Up Planner</b> <b>Pop-Up Financials</b> workbook <b>Certificates of Achievement</b>	15 minutes





*Welcome students to Meeting*



## 7.1 POP-UP CLOSEOUT

30 MINUTES



### Objectives



By the end of this learning topic, students will be able to:

- Complete the tasks to calculate final sales and profit and close out the business.



### Discuss: Close-Out Tasks



1. Review the close-out tasks students will complete during this meeting:

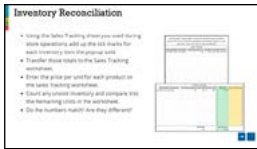
- Inventory reconciliation
- Cash reconciliation
- Profit calculations
- Proceeds details



Now that the pop-up store has closed, it's time to complete the close-out tasks. There are a few more things to do to officially close the books of the business! We will look at our inventory, reconcile our starting cash, calculate our profit, and discuss the logistics for distributing our proceeds.

2. Direct students to the **Pop-Up Close-Out** section of the **Pop-Up Planner** on page 62. Prompt them to follow along as you go through the checklist of close-out tasks that need to be completed during the meeting. They should record relevant information as it is discussed during the meeting.
3. Also remind students to check the task checklist for each business role to ensure they've completed all of those tasks too. **Roles Checklists** begin on page 28 of the **Pop-Up Planner**.





## Inventory Reconciliation

- Tell students that the goal is to reconcile (or settle) the inventory in the **Sales Tracking** worksheet of the **Pop-Up Financials** workbook and decide what to do with any remaining units.
- Instruct students to complete the following steps to wrap up inventory:
  - Add up the tick marks for each inventory item on the **Sales Tracking** document students used during store operations. Note the total for each item.
  - Record the tally totals on the **Sales Tracking** worksheet of the **Pop-Up Financials** workbook. (Encourage students to itemize the inventory information for more detailed records.)
  - Enter the price per unit for each product on the **Sales Tracking** worksheet. The table will automatically calculate the total units sold, remaining units, and total revenue.
  - Reconcile the inventory by counting the remaining units and comparing their counts to the calculated number. (Students should determine the number of units remaining for all itemized merchandise.)
- Discuss and analyze the results. The discussion will be driven by whether the reconciliation was accurate or showed a discrepancy. Consider the following questions to prompt student thinking:
  - ? Were there sales tracking sheets at every register?
  - ? Was sales staff appropriately trained on tracking sales?
  - ? Was there enough staff to manage the flow of customers and allow time between each transaction to record information?
- Discuss what to do with any leftover inventory, if applicable. Some ideas include:
  - Keep it for next year.
  - Donate it to a charitable cause.
  - Use it for another fundraiser.



## Cash Reconciliation

- Tell students that the goal of this step is to settle the starting cash and find the total cash revenue using Task 1 of the **Profit** worksheet of the **Pop-Up Financials** workbook.



9. Instruct students to complete the following steps to reconcile the cash:

- Count the total cash from the pop-up cash register/box.
- On the **Profit** worksheet, record the Total Cash in Task 1.
- Starting cash should have been previously recorded. If not, refer back to the starting cash identified in the **Launch Logistics** section of the **Pop-Up Planner** on page 57. On the **Profit** worksheet, record the Starting Cash in Task 1.
- Physically count out the starting cash from the total cash and set it aside to be reconciled appropriately. (That money gets returned to whomever provided the starting cash.)
- Share the sales tax percentage as a number (e.g., 6% as 0.06) with the class. Instruct them to input the percentage number in the Sales Tax field on the **Profit** worksheet in Task 1.
- Prompt students to record the Total Cash Revenue amount in the **Cash Reconciliation** section of their **Pop-Up Planner** on page 63.



## Profit Calculations

10. Tell students that the goal of this step is to find the total profit using Task 2 of the **Profit** worksheet in the **Pop-Up Financials** workbook.

11. Instruct students to complete the following steps to calculate profit:

- Confirm that all of the information in Task 1 on the **Profit** worksheet is accurate, because the Total Revenue from this calculation will automatically populate into Task 2.
  - To confirm that the numbers are accurate, add up all transactions recorded (credit card totals without tax, electronic payment statements without tax, cash sales without tax, etc.) and compare them to the Total Revenue calculated in the **Sales Tracking** worksheet. These numbers should be the same. If they are not, reconcile the two for an accurate final revenue number.
- Confirm that all of the expenses listed on the **Expenses** worksheet are accurate. The Total Expenses from this sheet will automatically populate into Task 2 of the **Profit** worksheet.
- Prompt students to record the Total Profit number in the **Profit Calculations** section of their **Pop-Up Planner** on page 63.



## Proceeds Details

Now that we've calculated our profits, we know what proceeds we can donate to our worthy cause!



12. Explain that this is the fun part! Students need to figure out the details for donating the proceeds from the pop-up business.

- Discuss the following:
- ? How will the proceeds be delivered?
- ? Who will deliver the proceeds?
- ? When will they be delivered?



## Wrap-Up: Completing the Checklist



Review the key takeaways:

- Your business doesn't end when you close the doors—the close-out tasks are an important part of entrepreneurship!
- Now's the time to double-check and finalize your finances.

## 7.2 MEASURING POP-UP SUCCESS



## Objectives



By the end of this learning topic, students will be able to:

- Analyze final sales information and compare it to the pop-up business's initial profit goal.
- Assess company and personal goals to determine successes and areas for improvement.



## Discuss: Review and Reflect



It's time to see how well you did! It's not just about profit, although that was our main goal. It's about what you've learned from your pop-up experience, both individually and as a team.



1. Explain that students will use this time to reflect on team and personal goals and growth, as well as the impact their pop-up business had on the school or the community.

... Planning and launching a pop-up business is not an easy task, but you did it! You started this experience with just an idea and have seen it through to the end. It was a journey full of new information and growth.

... In the Plan phase, we set goals we wanted to accomplish. Now that our experience has come to an end, it's important, as an entrepreneur, to reflect on those goals and anything else we learned, too.

2. Review and reflect on what students accomplished during the pop-up experience. Start by looking at the big picture and then focusing in on their individual accomplishments.
  - Original team and personal goals
  - Learning opportunities for the team and how students have grown personally from the experience
  - The impact the team's hard work has had on the school or community
  - How students will apply their entrepreneurial experience to the future and their next challenge



3. Guide students to the **Review and Reflect** section of the **Pop-Up Planner** on page 64.
4. Review and reflect on team success.
  - Recap the team goals. Ask a student volunteer to summarize the profit goal and any other team goals (if applicable) identified in the Plan stage.
  - Give students a few minutes to ponder their goals and write down ideas in the **Team Victories and Challenges** section of the **Pop-Up Planner** before sharing with the class. Use the following questions to guide their thinking:
    - ? Did we meet our goal? What did we accomplish?
    - ? What did we do to meet our goal? Did we make any changes from our original plan to maximize our success (like changing prices, offering promotions, adjusting our marketing strategy, etc.)?
    - ? How could we replicate our success in another pop-up business?



- ? What would you do differently? What would you tell your past self if you could go back in time and give him or her some advice?



5. Review and reflect on students' personal successes.
6. Review the questions below, which students will address in the **Personal Victories and Challenges** section. Give students a few minutes to complete their reflections. These do not have to be shared with the class but may add value as students hear others' experiences (time-permitting).
7. Use these questions to prompt discussion or students' reflection.
  - ? If you set a personal goal, did you meet it? If not, what did you personally accomplish during the pop-up experience?
  - ? What did you learn about yourself or running a business?
  - ? Refer back to the list of entrepreneurial characteristics. Which one(s) did you develop the most?
  - ? In the future, how can you use what you've learned, either at school or at a job?



8. Review and reflect on the impact the pop-up business had on the school or community.
  - ... This pop-up had a big impact on a lot of people—our customers and ourselves. But at the center of our pop-up experience was our focus on donating our proceeds to a worthy cause. We will donate our proceeds and know that our small gesture can have a big impact. But how else are we benefiting the school or community with what we accomplished?
9. Discuss with students the greater impact their pop-up business will have. Encourage them to think beyond selling products or services to customers. Use the following questions to guide students' thinking:
  - ? What good could come from the money we donated?
  - ? How could it help the school or community?
  - ? What could the proceeds enable the school or community to do?



## Wrap-Up: Closing Thoughts



1. Congratulate students on successfully completing the *JA Company Program Pop-Up* program! Tell them that this experience has:



- Prepared them to solve real-world problems through business and management skills.
  - Refined important entrepreneurial characteristics that can be applied anytime and anywhere.
  - Led them to become more confident communicators and collaborators.
2. Ask for student volunteers to share the most memorable thing they learned.



Share what you have learned. . . .

3. Distribute the **Certificates of Achievement** and encourage students to share them with their families and store them for their future portfolios.
4. Instruct students to complete the Post-Program survey, available in Meeting Seven in the JA Connect course.



## Wrap-Up: Congratulations



Share final thoughts:

- Congratulations! You did it! You ran a successful pop-up shop!
- Now don't stop here—take what you learned and apply those new skills whenever you can!
- Good luck, entrepreneur!



# Glossary

Term	Definition
advertising	methods used to describe or draw attention to (a product, service, or event) in a public way in order to promote sales or attendance
breakeven point	the point at which revenue is equal to expenses, resulting in no profit but also no loss; the amount of revenue needed to cover the total expenses
cost	money spent on something
cost of goods	the cost of making the goods sold by a business, including materials and labor directly used to create the goods
customer care	attending to customers' needs to ensure their satisfaction and delight with a product or business
empathy	ability to understand and share the feelings of another (to see the problem through another person's eyes)
expense	the amount spent to make purchases and pay bills (e.g., the rent you pay for your business's location)
fixed expense	a business cost that does not change and is always the same amount paid on a regular basis
market research	the gathering and evaluating of data about what customers like and dislike about products and services
marketing	the business of promoting and selling products or services, including market research and advertising
operating costs	the total of all expenses needed to run a business
pop-up business	a temporary business that is open only for a limited amount of time
proceeds	money made from an event or activity
profit	the income earned after all expenses have been paid
profit equation	$\text{profit} = \text{revenue} - \text{expenses}$

(continued)



(continues)

Term	Definition
promotion	the way you get your customers' attention, create awareness, and persuade them to buy a product or service
reconcile	the process of making sure that two sets of numbers match, such as starting cash vs. ending cash or estimated expenses against actual expenses
revenue	the income earned from the business (e.g., the money a customer pays to buy a product or service)
sales	exchange of money for a product or service
target audience	a group of potential customers who need or want your product or service and are willing and able to pay for it
variable expense	a business cost that increases or decreases based on external factors (such as the number of products sold, how much something is used, how much someone is paid per hour, etc.)