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| **TEXAS CTE LESSON PLAN**[www.txcte.org](http://www.txcte.org) |
| **Lesson Identification and TEKS Addressed** |
| **Career Cluster** | Business Management & Administration |
| **Course Name** | Business Management |
| **Lesson/Unit Title** | Planning and Decision Making in an Organization |
| **TEKS Student Expectations** | **130.139. (c) Knowledge and Skills**(3) The student recognizes the importance of planning in an organization(A) The student is expected to define the term planning(B) The student is expected to explain the necessity of proper planning(C) The student is expected to define types of planning such as marketing, financial, and organizational(D) The student is expected to identify steps of the management decision-making process, including… (there are sub standards within this substandard) |
| **Basic Direct Teach Lesson**(Includes Special Education Modifications/Accommodations and one English Language Proficiency Standards (ELPS) Strategy) |
| **Instructional Objectives** | * Upon completion of this lesson, the student will understand planning as an important management function.
* Upon completion of this lesson, the student will understand the decision-making process.
* Students will define types of planning in an organization.
* Students will analyze the steps involved in decision-making.
* Students will apply the decision-making process to a variety of situations.
* Students will learn goal-setting using the S.M.A.R.T. goal process.
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| **Rationale** | Students should understand decision-making and planning in an organization to prepare for the workplace. |
| **Duration of Lesson** | When taught as written, this lesson should take 5-6 days to complete |
| **Word Wall/Key Vocabulary***(ELPS c1a,c,f; c2b; c3a,b,d; c4c; c5b) PDAS II(5)* | * Management – setting forth goals for an organization and the processing for accomplishing them
* Planning – setting goals, reviewing information, and making decisions
* Organizing – coordinating resources needed to achieve goals
* Staffing – actions necessary for hiring, training, and compensating employees
* Implementing – carrying out leadership activities in an organization
* Controlling – determining the status of whether goals from the planning stage have been met
* Opportunity costs – what is given up making a choice
* Strategic planning – long term planning with broad goals for a company as a whole
* Operational planning – short term planning with more specific goals for departments or groups within a company
* SWOT analysis – an analysis of the strengths, weaknesses, opportunities, and threats affecting an organization internally and externally
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| **Materials/Specialized Equipment Needed** | 1. Planning and Decision-Making Assignment #1/Rubric
2. SWOT Analysis Assignment #2/Rubric
3. Cost/Benefit Analysis Assignment #3
4. Cost/Benefit Analysis Assignment #3 Rubric
5. Business Scenario Report Assignment #4

9. Business Scenario Report Assignment #4 Rubric 10. Connect the Numbers**Materials Needed:**1. Poster board
2. Flip chart paper
3. Markers

**Equipment Needed:**1. Computers for students to complete projects
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| **Anticipatory Set**(May include pre-assessment for prior knowledge) | 1. Brainstorm with students what their ideas of management are. You can get them started by naming a specific company with which they are familiar. Record their responses on the board, flipchart, or a document camera. Ask for a student to volunteer to be the recorder for this activity. Have a list of the five management functions posted somewhere in the classroom so students can refer to the list during this activity.
2. Now, going through the list of management functions that students have brainstormed, identify each as the appropriate management function and have the student volunteer write the function next to the task. Generally, when this is done there are many tasks which involve planning and decision-making. Explain to the students that this is where management begins, with goals and planning for the organization.

Introduction: 1. Ask students to write a list of all the decisions they make in an average, ordinary day. Give them a 5-minute time limit. Ask each student for an item from their list and record either on the board or document camera. Discuss with students that we make hundreds, even thousands, of decisions in a day.
2. Then discuss the process we use to make those decisions. Some are made in an instant. Some require much more time. Review with students the types of decisions that require more thought and the steps involved in reaching the final decision.
3. Next, have students get in pairs and have them write down the types of decisions a business may have to make. Choose a student to be a recorder and write down one decision for each pair on the board. Go through the list one by one and ask students if each is a long-term or a short-term decision
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| **Direct Instruction \*** | **Outline:** 1. Management Functions
	1. Planning
	2. Organizing
	3. Staffing
	4. Implementing
	5. Controlling
2. Reasons for Decision-Making
	1. Routine, daily activities
		1. Making coffee
		2. Checking email
		3. Returning business calls
	2. When problems arise
		1. Finding someone to repair an appliance
		2. An order of inventory is out of stock
		3. Dissatisfied customer
	3. When change is anticipated
		1. Selling a home or selling a business
		2. Introducing a new product
		3. A need to create a new department or layoff staff
 | If necessary, Instructors are recommended to make a PowerPoint presentation in conjunction with the lesson outline.Discuss with students the many reasons we must make decisions. Point out that the more routine the decision, the less thought given to the process. For example, whether to make coffee in the morning or check your email requires little thought.When a change is imminent, such as selling your home or business, much thought and planning is required.Have students compose a list of at least 10 decisions they make in an average day. Then, in pairs, have them make a list of 10 decisions that are made by employees in a day. |
| 1. Types of Planning
	1. Strategic
		1. Long-term
		2. Broad goals
		3. Company as a whole
	2. Operational
		1. Short-term
		2. Specific goals

Departments or groups within a company | explain to students the differences betweenstrategic and operational planning. Give some examples for them torelate to personally such as how planning for college or a career would be strategic planning and what to wear to school is operational planning.Provide examples of each forbusiness as well such as: strategic- building a new factory, expanding the business, or introducing a new product; operational-planning a budget, ordering inventory, or preparing work schedules. Using the lists from above, have students volunteer their decisionsand identify them as either strategic or operational. Afterward, discuss that, because strategic planning involves more time and details, careful analysis must be done. |
| 1. Strategic Planning- SWOT Analysis
	1. S- Strengths- internal
	2. W- Weaknesses- internal
	3. O-Opportunities- external

T-Threats- external | As a class decide on an event that requires strategic planning, such as a pancake breakfast fundraiser. Then ask students what strengths are there going into this decision that can affect the success of the event. Responses may be things like: plenty of volunteers and a large kitchen to work with. Weaknesses could be that most volunteers are students and may not know how to cook the pancakes. Opportunities could include the timing of the event-if it is near the holidays, maybe Santa could attend and have pictures taken with the children who come to the breakfast with their parents. Threats can be the possibility of running out of food if not enough is purchased, or not enough customers so profit cannot be made. Next, from a business standpoint, take suggestions from students to conduct a SWOT analysis for a business event they may have heard about in the news. |
| 1. Decision-Making Process
	1. Identify the problem
		1. Ask questions
		2. Gather information
	2. Determine the possible solutions
		1. Brainstorm
		2. Make a list
	3. Analyze the possible solutions
		1. SWOT
		2. Cost-benefit analysis
	4. Select the best solution
		1. Implement the solution
		2. Analyze the results
	5. Evaluate feedback

Make changes as necessary | Using the business event that was agreed upon in the previous step, provide students with a blank decision tree diagram (diagram templates can be found online and printed) and proceed through each step. Students should be following along and complete the diagram.Next, show students how a SWOT analysis can also help evaluate the alternatives. Use the web site listed to review examples with students. To help narrow down the choices, a cost-benefit analysis should also be conducted as part of the evaluation. List out the tangible and intangible costs and benefits of the narrowed-down alternatives. |
| 1. Importance of Planning
	1. Planning for products/services
	2. Planning for marketing
	3. Planning for human resources
	4. Planning for financial issues

Planning for legal business considerations | Planning is necessary for all aspects of the business to ensure success at all levels of the business. |
| **Guided Practice \*** | * Give the students the “Connect the Numbers” handout. With no instruction tell them to connect the numbers from 1-60 in 1 minute. Ask if any of them completed the job. Now give them 1 minute but this time tell them to fold the paper in half. The top half has 1-6; bottom has 7-12, 13-18 on the top, etc. If they fold their paper again but lengthwise, odd numbers are on the left and even on the right. This time they should be more successful. Explain that this can represent the difference between planning and not planning. Therefore, planning is so important to any decision.
* Ask students the reasons that we make decisions. Listen to and record their responses. Then explain that, in the business world, decisions can be made daily without much preparation (such as grabbing the morning coffee and returning emails or phone calls), when there is a problem that arises (such as a delay in a shipment or a dissatisfied customer), or when a change of some sort is anticipated (new product planning or change in distribution channel).
* Using a corporate name familiar to students, demonstrate the use of a decision-making grid as well as a decision tree using the information found within any website you deem appropriate. Ask students to suggest an event that may require the process of decision-making, so they can see how the grid or tree can be useful tools to assist in the decision. After the teacher demonstrates the process, students can decide on a decision that would require one of these models. Distribute a sample form or show one on the computer projector so they can create a model in their pairs. They will then present their model to the class.
* Explain that another tool of decision-making is the SWOT analysis. Using the web site listed in the reference, go through an example with the students so they understand the process.
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| **Independent Practice/Laboratory Experience/Differentiated Activities \*** | **See Handouts:*** Decision-Making Model Assignment #1
* SWOT Analysis Assignment #2
* Cost/Benefit Analysis Assignment #3
* Business Scenario Report Assignment #4
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| **Lesson Closure** | 1. Short-term goals are characteristic of what type of planning?
2. Operational planning is made up of short-term goals.
3. What are characteristics of strategic planning?
4. Strategic planning involves long-term planning and broad goals for a company.
5. What is the first function of management that must take place before objectives are met and includes decision-making?
6. Planning is the first function of management and includes decision-making.
7. What is a SWOT analysis?
8. A method of evaluating alternatives using their strengths, weaknesses, opportunities, and threats.
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| **Summative / End of Lesson Assessment \*** | **Informal Assessment:**1. Instructor will observe students during Independent Practice.
2. Instructor will assist students as needed.

**Formal Assessment:**1. Use the assigned rubrics to evaluate the two Independent Practice Assignments.
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| **References/Resources/****Teacher Preparation** | * Business Principles and Management, Everard Burrow, South-Western Thompson Learning
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| **Additional Required Components** |
| **English Language Proficiency Standards (ELPS) Strategies** |  |
| **College and Career Readiness Connection[[1]](#footnote-1)** | * **110.31 (b)(21)(B)** organize information gathered from multiple sources to create a variety ofgraphics and forms (e.g., notes, learning logs)
* **110.31 (b)(22)(B)** evaluate the relevance of information to the topic and determine the reliability, validity, and accuracy of sources (including Internet sources) by examining their authority and objectivity
* **110.31 (b)(23)(C**) uses graphics and illustrations to help explain concepts whereappropriate
* **110.31 (b)(23)(D)** uses a variety of evaluative tools (e.g., self-made rubrics, peer reviews,teacher, and expert evaluations) to examine the quality of the research
* **110.33(b)(1)(A) – Reading/Vocabulary Development**

…determine the meaning of grade-level technical academic English words in multiple content areas (e.g., science, mathematics, social studies, the arts) derived from Latin, Greek or other linguistic roots and affixes.* **110.33(b)(1)(C) – Reading/Vocabulary Development**

…infer word meanings through the identification and analysis of analogies and other word relationships.* **110.33(b)(12)(B) – Reading/Media Literacy**

…evaluate the interactions of different techniques (e.g., layout, pictures, typeface in print media, images, text, sound in electronic journalism) used in multi-layered media.* **110.33(b)(12)(C) – Reading/Media Literacy**

…evaluate the objectivity of coverage of the same event in various types of media.* **110.33(b)(12)(D) – Reading/Media Literacy**

…evaluate changes in formality and tone across various media for different audiences and purposes. |
| **Recommended Strategies** |
| **Reading Strategies** |  |
| **Quotes** |  |
| **Multimedia/Visual Strategy****Presentation Slides + One Additional Technology Connection** |  |
| **Graphic Organizers/Handout** |  |
| **Writing Strategies****Journal Entries + 1 Additional Writing Strategy** |  |
| **Communication****90 Second Speech Topics** |  |
| **Other Essential Lesson Components** |
| **Enrichment Activity**(e.g., homework assignment) | 1. Have students talk to a local retail or restaurant manager and ask if they have undergone a change in their business, such as a new marketing campaign, remodeling the store, changing to a new menu, or opening a new restaurant. The student will then create a decision tree that hopefully includes the components of the decision-making process that was done by that business to implement change. Students should ask the manager to review and sign off on the decision tree.
2. Students can use the same situation as in #1 but create a SWOT analysis instead of a decision tree.
3. Tell students they have come in to some money - $10,000 – and now they should decide how to spend, or save, the money. Have them conduct a thorough decision-making analysis using any tools necessary. They should have at least 3 alternatives to analyze.
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| **Family/Community Connection** |  |
| **CTSO connection(s)** | Business Professionals of AmericaFuture Business Leaders of America |
| **Service Learning Projects** |  |
| **Lesson Notes** |  |

1. Visit the Texas College and Career Readiness Standards at <http://www.thecb.state.tx.us/collegereadiness/CRS.pdf>, Texas Higher Education Coordinating Board (THECB), 2009. [↑](#footnote-ref-1)