

# 2025–2026 Competitive Events Guidelines

## Retail Management (Collegiate)



Retail Management challenges members to demonstrate their understanding of core retail operations and strategies through an objective test. Members are assessed on key competencies such as inventory control, customer service, sales techniques, merchandising, and store operations.

### Event Overview

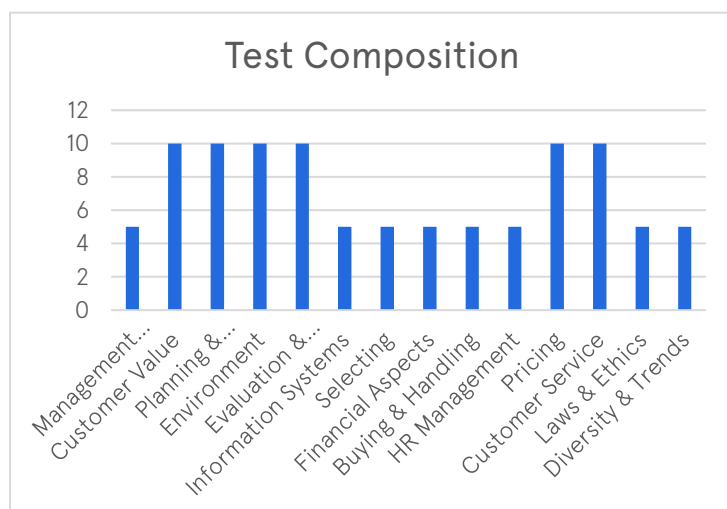
|                |                                               |
|----------------|-----------------------------------------------|
| Division       | Collegiate                                    |
| Event Type     | Individual                                    |
| Event Category | Objective Test                                |
| Event Elements | 50-minute test, 100-multiple choice questions |

### Educational Alignments

|                                                     |                                                                                                      |
|-----------------------------------------------------|------------------------------------------------------------------------------------------------------|
| <a href="#">Career Cluster Framework Connection</a> | Marketing & Sales                                                                                    |
| <a href="#">NACE Competency Alignment</a>           | Career & Self-Development, Communication, Critical Thinking, Leadership, Professionalism, Technology |

### Knowledge Areas

- Retail Management Functions
- Customer Value, Services, Retailing Technologies
- Retail Planning & Management Process
- Retail Environment
- Evaluation & Identification of Retail Customers
- Retailing Information Systems
- Selecting the Appropriate Market & Location
- Financial Aspects of Operations Management
- Merchandise Buying & Handling
- Human Resource Management in Retailing
- Pricing in Retailing
- Customer Service in Retailing
- Laws & Ethics
- Diversity & Trends



Test questions are based on the knowledge areas and objectives outlined for this event. Detailed objectives can be found in the study guide included in these guidelines.

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### State

Check with your State Leader for state-specific competition information and deadlines.

### National

#### *Required Competition Items*

| <u>Items Competitor Must Provide</u>                                                                                                                                                                                                                                                      | <u>Items FBLA Provides On-site</u>                                                                                                                                                                     |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Sharpened pencil</li><li>• Fully powered <a href="#">device for online testing</a></li><li>• Conference-provided nametag</li><li>• <a href="#">Photo identification</a></li><li>• Attire that meets the <a href="#">FBLA Dress Code</a></li></ul> | <ul style="list-style-type: none"><li>• One piece of scratch paper per competitor</li><li>• Internet access</li><li>• Test login information (link &amp; password provided at test check-in)</li></ul> |

#### *Important FBLA Documents*

- Competitors should be familiar with the Competitive Events [Policy & Procedures Manual](#), [Honor Code](#), [Code of Conduct](#), and [Dress Code](#).

#### *Eligibility Requirements*

To participate in FBLA competitive events at the National Leadership Conference (NLC), the following criteria must be met:

- **Membership Deadline:** FBLA national membership dues must be paid to the specific division by 11:59 p.m. Eastern Time on March 1 of the current school year.
- **Conference Registration:** Members must be officially registered for the NLC and must pay the national conference registration fee to participate.
- **Official Hotel Requirement:** To be eligible to compete, competitors must stay within the official FBLA housing block.
- **State Entry Limits:** Each state may submit up to four entries per event.
- **Event Participation Limits:** Each member may participate in:
  - Two individual or team events, and
  - One chapter event (e.g., *Community Service Project* or *State of Chapter Presentation*).
- **Participation Requirement:** To be eligible for an award, each competitor must complete all components of the event at the National Leadership Conference.
- **Identification at Check-in:** Competitors must present valid photo identification (physical or digital) that matches the name on their conference name badge. Acceptable forms include a driver's license, passport, state-issued ID, or school ID.
- **Late Arrivals:** Competitors will be allowed to compete until such time that the results are finalized, or participation would impact the fairness and integrity of the event, as determined by Competitive Events staff. Five penalty points will be assessed for late arrivals in any competitive event.
- **Event Schedule Notes:**
  - Some events may begin before the Opening Session.
  - All schedules are posted in local time for the NLC host city.
  - Schedule changes are not permitted.

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### *Event Administration*

- **Test Duration:** 50 minutes
- **Format:** This event consists of an online objective test that is proctored and completed on-site at the National Leadership Conference (NLC).
- **Materials:** Reference or study materials are not permitted at the testing site.
- **Calculators:** Personal calculators are not allowed; an online calculator will be available within the testing platform.
- **Question Review:** Competitors may flag questions within the testing platform for review prior to the finalization of results at the NLC.

### *Scoring*

- Each correct answer is worth one point.
- No points are deducted for incorrect answers.
- Tiebreakers are determined as follows: (1) The number of correct responses to 10 pre-selected tiebreaker questions will be compared. (2) If a tie remains, the number of correct responses to 20 pre-selected questions will be reviewed. (3) If a tie still remains, the competitor who completed the test in the shortest amount of time will be ranked higher.
- Results announced at the National Leadership Conference are considered official and will not be changed after the conclusion of the National Leadership Conference.

### *Penalty Points*

- Competitors may be disqualified if they violate the Code of Conduct or the Honor Code.
- Five points are deducted if competitors do not follow the Dress Code or are late to the testing site.

### *Recognition*

- A maximum of 10 entries (individuals or teams) may be recognized per event.

### *Americans with Disabilities Act (ADA)*

- FBLA complies with the Americans with Disabilities Act (ADA) by providing reasonable accommodations for competitors. Accommodation requests must be submitted through the conference registration system by the official registration deadline. All requests will be reviewed, and additional documentation may be required to determine eligibility and appropriate support.

### *Electronic Devices*

- Unless approved as part of a documented accommodation, all cell phones, smartwatches, electronic devices, and headphones must be turned off and stored away before the competition begins. Visible devices during the event will be considered a violation of the FBLA Honor Code.

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### *Sample Preparation Resources*

- Official sample test items can be found in [CONNECT](#). These sample items showcase the types of questions that may be asked on the test and familiarize competitors with the multiple-choice item options.

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### Study Guide: Knowledge Areas and Objectives

#### A. Retail Management Functions

1. Describe the basic functions of retail management and give examples of how each function relates to the retail business.
2. Cite the principles of effective delegating and directing.
3. Describe the communication process and approaches to develop understanding.
4. Identify the dimensions of quality and be able to apply them to a retail company.
5. Describe the special characteristics of retailing and the importance of developing a retail strategy.
6. Select tasks, jobs, and develop an organizational chart.
7. Discuss the supervision principles applied to a retail environment.
8. Describe the basic concepts of operations and financial management in retailing.
9. Describe the wheel of retaining, scrambled merchandising, and the retail life cycle and show how they can help explain the performance of retail strategy mixes.
10. Recognize and apply principles and procedures such as time management, technology, networking and entrepreneurial thinking.
11. Recognize basic tenants of management theories (i.e., strategic management, operations management) and their importance in the successful operation of an organization.
12. Define retailing and describe the variety of decisions the retailers make to satisfy customer needs in a rapidly changing, highly competitive environment.

#### B. Customer Value, Services, Retailing Technologies

1. Discuss the impact of technology on relationships in retailing.
2. Explain the role and scope of the world wide web in retailing.
3. Identify the characteristics of web users.
4. Administer RFID, EDI, and supply chain management.
5. Utilize online resources to research a vendor or retail company.
6. Utilize email to communicate with customers.
7. Describe the specific software available for communication and management applications.
8. Discuss applications in managing, organizing, and analyzing data.
9. Explain why retailing with an emphasis on customer service and relationship is the foundation of a successful business.
10. Describe the value-added approach to selling using the strategic/consultative selling model.
11. Explain what 'value' means and highlight its pivotal role in retailers' building and sustaining relationships.
12. Discuss factors consumers consider when choosing stores and buying merchandise.
13. Discuss the concepts of creating and maintaining a retail image from a service and a physical appearance perspective.

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### C. Retail Planning and Management Process

1. Describe how to set up a retail organization.
2. Describe the retail strategic planning and operations management model.
3. Explain the steps in strategic planning for retailers: situation analysis, objectives, identification of consumers, overall strategy, specific activities, control and feedback.
4. Outline the components of strategic planning and develop a strategic plan for a retail opportunity.
5. Explain the nature of risk.
6. Define operations management and describe the operational scope of operations management.
7. Describe asset management, including the strategic profit model, other key business ratios and financial trends in retailing.
8. Explain several specific aspects of operating a retail business: operations blueprint, store format, size and space allocation; personnel utilization; store maintenance, energy management, and renovation; inventory management; store security; insurance; credit management; computerization; outsourcing; and crisis management.
9. Describe the steps retailers go through to develop a retail market strategy.
10. Explain why retailers need to evaluate their performance of the financial strategy associated with the market strategy.
11. Explain the strengths and weaknesses of the different methods of communicating with customers.
12. Explain the responsibilities of a store manager and how they increase productivity and reduce costs.
13. Explain how store managers reduce inventory losses due to employee theft and shoplifting.

### D. Retail Environment

1. Distinguish retailers and their activities from other marketing institutions.
2. Discuss retailers on the basis of ownership type and examine the characteristics of each including non-store-based and nontraditional retailing.
3. Compare and contrast the advantages and disadvantages of each type of retail operation.
4. Describe the advantages and disadvantages of each legal form of ownership.
5. Discuss two other non-traditional forms of retailing: video kiosks and airport retailing.
6. Discuss the characteristics of the three major retail institutions involved with non-store-based strategy mixes: direct marketing, direct selling, and vending machines.
7. Explain the procedures involved in setting up a retail organization.
8. Identify the various organizational arrangements utilized in retailing.
9. Discuss retailer's role in the supply chain.
10. Explain how retailers differ in terms of how they meet the needs of their customers.
11. Explain how retailers are using multiple selling channels – stores, internet and catalogs – to reach their customers.

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### E. Evaluation and Identification of Retail Customers

1. Discuss why it is important for a retailer to properly identify, understand, and appeal to its customers.
2. Discuss the concepts of customer demographics, lifestyles, and identifying customer needs.
3. Discuss the concept of customer-driven strategic management.
4. Develop a format for evaluating customer service in a retail industry business.
5. Describe applications in effective communication to customer service situations.
6. Describe how to deal with difficult customers.
7. List and describe consumer demographics, lifestyle factors, and needs and desires – explain how these concepts can be applied to retailing.
8. Discuss consumer attitudes toward shopping and consumer shopping behavior, including the consumer decision process and its stages.
9. Develop a customer retention strategy and describe how retailers build customer loyalty.
10. Profile target customer.

### F. Retailing Information Systems

1. Describe the retail information system, its components, and the recent advances in such systems.
2. Recognize the importance of customer information.
3. Discuss applications in managing, organizing and analyzing data.
4. Explain why retailers should avoid strategies based on inadequate information.
5. Discuss how information flows in a retail distribution channel.
6. Evaluate retail management information systems.
7. Describe what advanced information technology developments are facilitating vendor-retailer communications.
8. Explain why getting merchandise faster translates to stronger retailer profits.

### G. Selecting the Appropriate Market and Location

1. Discuss the importance of store location for a retailer and outline the process for choosing a store location.
2. Explain the types of locations available to a retailer, isolated store, unplanned business district, and planned shopping center.
3. Describe the concept of the one-hundred percent location.
4. Discuss several criteria for evaluating general retail locations and the specific sites within them.
5. Describe a trade area, and why a retailer should choose one over another.
6. Describe three major factors in trading-area analysis: population characteristics, economic base characteristics, and competition and the level of saturation.
7. Determine how retailers forecast sales for new store locations.

### H. Financial Aspects of Operations Management

1. Describe how retailers prepare, evaluate, and revise budgets.
2. Define asset management and resource allocation.
3. Compute financial ratios.
4. Explain tactics to improve cash flow.

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5. Describe sources of financial funding (i.e., debt and equity).
  6. Explain credit policy and the importance of credit management.
  7. Explain terms related to financial statements and interpret.
  8. Evaluate how a retail strategy is reflected in the financial objectives.
  9. Explain the cost and retail methods of accounting.
  10. Analyze retail financial statements and data to make long and short-term financial decisions.
- I. Merchandise Buying & Handling
1. Explain how the buying process is organized.
  2. Describe the major aspects of financial merchandise planning and management.
  3. Describe what trade-offs retailers must make to ensure that stores carry the appropriate type and amount of merchandise.
  4. Describe the steps in the implementation of merchandise plans: gathering information, selecting and interacting with merchandise sources, evaluation, negotiation, concluding purchases, receiving and stocking merchandise, reordering and reevaluation.
  5. Explain the considerations in devising merchandise plans: forecasts, innovativeness, assortment, brands, timing, and allocation.
  6. Explain how retailers evaluate their merchandising performance and determine the profitability of their merchandising decisions.
  7. Describe the prominent roles of logistics and inventory management in the implementation of merchandise plans.
  8. Discuss information technology developments that facilitate vendor-retailer communications.
  9. Explain how multi-store retailers allocate merchandise to stores.
  10. Justify the importance of a collaborative supply chain relationship.
- J. Human Resource Management in Retailing
1. Describe the process of recruiting and selecting salespeople.
  2. Determine what activities retail employees undertake, and how they are typically organized.
  3. Explain what legal and ethical issues store managers must consider in managing their employees.
  4. Describe the importance of employee motivation and employee relations.
  5. Evaluate retail employees.
  6. Communicate the rights and responsibilities of employees.
  7. Describe the fundamentals of training, compensating, and motivating salespeople.
  8. Explain the management of human resources and how they play a vital role in a retailer's performance.
- K. Pricing in Retailing
1. Describe the role of pricing in a retail strategy and how pricing decisions must be made in an integrated and adaptive manner.
  2. Discuss the impact of consumers, government, manufacturers, wholesalers and other suppliers, and current and potential competitors on pricing decisions.

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3. Develop a framework for developing a retail price strategy: objectives, broad policy, basic strategy, implementation, and adjustments.
  4. Explain why some retailers have frequent sales while others attempt to maintain an everyday-low-price strategy.
  5. Determine what pricing strategies retailers use to influence consumer purchases, demonstrate value to the customer and capture value for the business.
  6. Determine under what circumstances retailers' pricing practices can get them into legal difficulties.
  7. Describe and apply pricing strategies to determine prices.
  8. Assess pricing strategies to identify needed changes and to improve profitability.
  9. Identify the factors that influence the price of an item.
  10. Determine the selling price of a product – calculate mark-up, mark-down, sales tax, discounts.
- L. Customer Service in Retailing
1. Develop customer service strategies.
  2. Define what customer service is and the concept of customer satisfaction.
  3. Discuss techniques for dealing with customer concerns, challenges and objections.
  4. Discuss presentation and customer contact skills in a variety of situations.
  5. Describe how a retail store image is related to the atmosphere it creates.
  6. Explain the elements of retail promotion: advertising, public relations, personal selling and sales promotion.
  7. Describe customer relationship management.
  8. Explain how customer service can build a competitive advantage.
  9. Explain how customers evaluate a retailer's service.
  10. Explain what activities and services a retailer undertakes to provide high-quality customer service.
  11. Explain how retailers can recover from a service failure.
- M. Laws and Ethics
1. Define and give examples of the prohibitions concerning advertising, pricing and price fixing, product safety, product liability, financing and warranties of goods and services.
  2. Discuss the range of laws governing human resources including the areas of discrimination, sexual harassment, working conditions and OSHA, employment law and government oversight.
  3. Explain the global rights and privileges of consumers and the role of consumer protection agencies.
  4. Explain the purpose of a code of ethics, develop a code of ethics and apply the code to various issues confronted by business.
  5. Analyze factors influencing ethical decisions in business and apply ethical principles in specific business situations.
  6. Describe the impact of government on business activities – taxes, supply and demand, effect of fiscal and monetary policies.
  7. Define conflict of interest.

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8. Identify how the legal system works.
- N. Diversity and Trends
1. Differentiate between theories of retail institutional change.
  2. Discuss ways in which retail strategy mixes are evolving.
  3. Describe the trends that are shaping today's retailers and their impact.
  4. Describe what factors will affect the growth of electronic retailing.
  5. Explain how technology might affect the future shopping experience.
  6. Determine how and why retailers manage diversity among their employees.