

MARKETING – LEVEL 3 – CCA019 03

To achieve the full award, candidates must complete **seven (7)** units in total made up of **five (5)** mandatory units plus any **two (2)** of the optional units.

MANDATORY UNITS (All must be completed) Unit Number

- | | | |
|-----------|--|---------------|
| 1. | Develop marketing plans | U31903 |
| | 1.1 Develop marketing strategies and plans | |
| | 1.2 Monitor marketing strategies and plans | |
| 2. | Implement marketing plans | U32003 |
| | 2.1 Implement marketing plan | |
| | 2.2 Monitor marketing plans | |
| | 2.3 Evaluate marketing plans | |
| 3. | Identify relevant legal, regulatory, ethical and corporate social requirements impacting upon your own marketing activity | U32103 |
| | 3.1 Identify relevant legal regulatory, ethical and corporate social requirements | |
| | 3.2 Fulfill the legal, regulatory, ethical and corporate social requirements | |
| 4. | Resolve customer service problems | U13102 |
| | 4.1 Identify customer service problems | |
| | 4.2 Select the best solution to resolve customer service problems | |
| | 4.3 Implement the solution to customer service problems | |
| 5. | Design, conduct and interpret Marketing Research | U32203 |
| | 5.1 Identify need for research | |
| | 5.2 Determine research parameters | |
| | 5.3 Conduct basic research | |
| | 5.4 Interpret and analyze research findings | |
| | 5.5 Present research findings | |

OPTIONAL UNITS (choose two (2) only)

- | | | |
|----------|---|---------------|
| 6 | Manage your own resources and professional development | U32303 |
| | 6.1 Evaluate personal goals and professional development | |
| | 6.2 Manage own resources and professional development | |

MARKETING – LEVEL 3 – CCA019 03

<u>Optional Units .../Continued</u>	<u>Unit Number</u>
7. Identify and monitor competitors' marketing strategies and activities	U32403
7.1 Identify competitors marketing strategies and activities	
7.2 Monitor competitor's marketing strategies and activities	
8. Implement distribution plan	U32503
8.1 Coordinate implementation of a distribution plan	
8.2 Monitor distribution plan	
9. Develop an advertising campaign	U32603
9.1 Develop an advertising campaign	
9.2 Implement and monitor advertising campaign	
10. Develop a media plan for advertising products/service	U32703
10.1 Develop a media plan	
10.2 Advertise products/services	
11. Develop direct marketing plans	U32803
11.1 Identify components of the direct marketing plans	
11.2 Prepare direct marketing plan	
12. Coordinate sales promotion plan(s)	U32903
12.1 Implement sales promotion plans	
12.2 Monitor sales promotion	
13. Operate a company database	U33003
13.1 Maintain a database	
13.2 Create reports	
13.3 Retrieve information	
14. Manage a marketing budget	U33103
14.1 Assist in preparing marketing budget	
14.2 Manage marketing budget	
15. Encourage innovation	U33203
15.1 Identify new ideas for products / services	
15.2 Implement new ideas for products / services	

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Optional Units .../Continued

Unit Number

16. Participate in product and service development

U33303

16.1 Research opportunities for new product/service

16.2 Develop a product/service proposal to meet market opportunity

It is envisaged that only in exceptional circumstances will a candidate meet the requirements of this qualification with less than twelve months relevant experience.

U31903: Develop marketing plans

Unit Descriptor:

This unit is about establishing marketing goals and objectives, and developing plans for their achievement for an organisation's products/services. Such goals and objectives should be in line with the organisation's overall corporate marketing strategy. This involves building upon identified strengths, weaknesses, opportunities and threats, including making the best use of the existing customer base. It includes developing and evaluating strategies and budgeted actions for the relevant aspects of the marketing mix, and forecasting the return from identified strategies.

ELEMENT	PERFORMANCE CRITERIA
<i>To be competent you must achieve the following:</i>	
1. Develop marketing strategies and plans	1.1 Identify and prioritise marketing objectives for products/services which are consistent with the organisation's overall marketing strategy. 1.2 Identify and prioritise those market segments at which the products/services are to be targeted and develop marketing strategies and tactics appropriate for these segments and for realising the agreed objectives. 1.3 Explore and assess the opportunity for possible partnerships and affiliations towards achieving the marketing plans. 1.4 Position the products / services within the competitive framework. 1.5 Identify and ensure the resources and capabilities required to deliver the agreed strategy are available and establishing whether these require to be outsourced 1.6 Develop and agree marketing plans and budgets for the achievement of the strategies, setting out clear actions, accountabilities and milestones.
2. Monitor marketing strategies and plans	2.1 Prepare reasoned forecasts of demand and review the plans to address variances from these forecasts.

- 2.2 Identify and prioritise key performance measures, and methods for monitoring and evaluating the marketing plans according to the organisational requirements.
- 2.3 Identify and ensure that the appropriate resources and capabilities required to deliver the agreed strategy, establishing whether these are available required to be outsourced.
- 2.4 Communicate the strategies and plans, and gain commitment to their achievement from all **relevant stakeholders**.

RANGE STATEMENT

You must cover the items below:

Element 1: Develop marketing strategies and plans

A. Marketing objectives

- (i) types of products/services
- (ii) target groups
- (iii) environment
- (iv) costs
- (v) time

B. Marketing Plans

- (i) technical features
- (ii) design
- (iii) promotion
- (iv) products/service

C. Budgets

- (i) sales (revenue)
- (ii) sales promotions (expenditure)
- (iii) advertising
- (iv) marketing research (customer satisfaction, advertising research, test promotion etc)

Element 2: Monitor marketing strategies and plans**D. Relevant People (at least 4)**

- (i) marketing
- (ii) planning
- (iii) public relations
- (iv) human resources
- (v) sales
- (vi) IT
- (vii) Finance

UNDERPINNING KNOWLEDGE AND SKILLS

1. You anticipate likely future scenarios based upon a realistic analysis of trends and development
2. You present ideas and arguments clearly, concisely and convincingly
3. You articulate the assumptions made and risks involved in understanding a situation
4. You ensure that others understand and agree what is expected of them and hold them to account
5. You create a common sense of purpose
6. You make time available to support others
7. You encourage and are open to new ideas
8. You recognise changes in circumstances promptly and adjust plans and activities accordingly

Knowledge and understanding

9. The importance of long and medium-term planning to the success of particular products/ services
10. The principles of strategic management and business planning
11. The topics to be addressed with a strategic marketing plan for products/services
12. How to identify potential risks in relation to the achievements of objectives
13. How to develop strategic objectives, actions, accountabilities and associated **budgets** and forecasts
14. How to delegate responsibility and allocate resources to support a marketing plan
15. How to develop contingency plans to address risks and changing circumstances
16. The importance of consulting with colleagues and other stakeholders during the development of a plan, and how to do this effectively
17. How to develop measures and methods for monitoring and evaluating performance against the plan, including key performance indicators

Industry/sector specific knowledge and understanding

18. A reasonable understanding of the legal, regulatory and ethical requirements affecting the marketing of products/services in the organisation's sector
19. Market developments in the organisation's sector

Context specific knowledge and understanding

20. The organisation's marketing strategy relevant to the products/services under consideration
21. The organisation's actual and potential customer base for the products/services, and their needs and expectations relating to the products/services
22. The organisation's actual and potential competitors, and the key features of their tactics
23. Sources of information to assist in monitoring and evaluation of the plan
24. Colleagues and other key stakeholders, and their needs and expectations
25. Processes for consultation within the organisation

EVIDENCE GUIDE

(1) Critical Aspect of Evidence

You must provide evidence that shows you have done this over a sufficient period of time for your assessor to consider that you are competent. You have to prove that they can meet all of the performance criteria on at least two (2) occasions. This evidence must come from working in a Marketing environment.

It is essential that competence be observed in the following aspects:

- The organisation's marketing strategy relevant to the products/services under consideration
- The organisation's actual and potential customer base for the products/services, and their need and expectations relating to the products/services
- The organisation's actual and potential competitors, and the key features of their tactics
- The organisation's ability to respond to market opportunities relating to the products/services
- Colleagues and other key stakeholders, and their needs and expectations
- Processes for consultation within the organisation

Performance evidence must be provided for **all** of the range items

(2) Method of Assessment

- Observation of work process
- Oral Questioning Interview
- Evaluation of Products of Work (e.g. market plans, **budgets**)
- Projects
- witness testimony
- simulation can be accepted where evidence may be missing.

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual workplace. However simulation can be accepted.

U32003: Implement marketing plans

Unit Descriptor:

This is about taking the organisation's **marketing plan**, once it has been developed and agreed, and putting it into action. This includes 'selling' the plan to the managers and other staff involved in putting it into practice, agreeing standards for measuring success, and also monitoring the implementation of the plan and making tactical responses to performance.

ELEMENTS**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | | | |
|----|--------------------------|-----|---|
| 1. | Implement marketing plan | 1.1 | Make sure that the people involved understand and support the marketing plan , and also their responsibilities related to its achievement. |
| | | 1.2 | Implement scheduled activities as detailed in the approved marketing plan . |
| 2. | Monitor marketing plan | 2.1 | Identify promptly any variances, or problems associated with achieving the plan, and alert relevant stakeholders . |
| | | 2.2 | Provide a rationale to stakeholders for any variances or changes to the marketing plan. |
| | | 2.3 | Inform the people involved of adjustments to the marketing plan, and help them to make consequent changes to their own plans. |
| 3. | Evaluate Marketing plan | 3.1 | Evaluate and record how the products/services in marketing plan has performed, in a way that will inform future marketing planning. |
| | | 3.2 | Identify marketing best practice and areas for improvement, and communicate these to colleagues and relevant stakeholders . |

RANGE STATEMENT

You must cover the items below:

A. Marketing plan (at least 2)

- (i) technical Features
- (ii) promotion
- (iii) products and Services
- (iv) safety
- (v) pricing

B. Relevant Stakeholders (at least 3)

- (i) Owners
- (ii) Managers
- (iii) Supervisors
- (iv) Finance staff
- (v) Human resources
- (vi) Public Relations
- (vii) IT

UNDERPINNING KNOWLEDGE AND SKILLS

1. The importance of motivating team members and methods for doing this.
2. The importance of identifying the needs, problems, strengths and weaknesses of an organisation's team members.
3. The importance of consulting with colleagues and other stakeholders regarding team members' performance, and how to do this effectively.

Industry/Sector specific knowledge and understanding

4. Legal, regulatory and ethical requirements affecting the implementation of the plan.

Context specific knowledge and understanding

5. The organisation's strategy relevant to the products/services under consideration
6. Targets for the performance of the organisation's with respect to the Marketing Plan.

7. The organisation's actual and potential customer base for the products/services, and their service needs
8. Colleagues and other **key stakeholders** and their needs and expectations
9. How to further develop and adjust the marketing plan.
10. How to manage people and resources to implement the marketing plan.

EVIDENCE GUIDE

(1) Critical Aspect of Evidence

You must provide evidence that shows you have done this over a sufficient period of time for your assessor to consider that you are competent. You have to prove that they can meet all of the performance criteria on at least two (2) occasions. This evidence must come from working in a Marketing environment.

It is essential that performance evidence be demonstrated in the following aspects:

- The organisation's marketing strategy relevant to the products/services under consideration
- The organisation's actual and potential customer base for the products/services, and their need and expectations relating to the products/services
- The organisation's actual and potential competitors, and the key features of their strategies
- The organisation's ability to respond to market opportunities relating to the products/services
- Colleagues and other **key stakeholders**, and their needs and expectations
- Processes for consultation within the organisation

(2) Method of Assessment

- Observation of work process
- Oral Questioning
- Evaluation of Products of Work e.g. (market plan, reports)
- Projects

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual workplace. However simulation can be accepted.

U32103: Identify relevant legal, regulatory, ethical and corporate social requirements impacting upon your own marketing activity

Unit Descriptor:

This unit is about ensuring that you fulfill those legal, regulatory and ethical requirements which impact upon your own marketing/marketing communications activities. It includes keeping up to date with relevant current legislation and codes of practice, and applying their requirements.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | | | |
|----|--|-----|--|
| 1. | Identify relevant legal, regulatory, ethical and corporate social requirements | 1.1 | Identify relevant legal, regulatory, ethical and corporate social requirements affecting your area of activity, and their impact for your responsibilities, including what would happen if the requirements are not fulfilled |
| | | 1.2 | Identify any reasons for potentially not meeting requirements and, where relevant, make recommendations regarding possible adjustments to enhance policies and procedures to reduce the likelihood of not fulfilling requirements |
| | | 1.3 | Monitor the work with which you are involved for any breaches of compliance with regulatory and ethical requirements . |
| | | 1.4 | Identify any breaches accurately and address these promptly and correctly |
| 2. | Fulfill the legal, regulatory, ethical and corporate social requirements | 2.1 | Follow policies and procedures designed to meet all of the necessary requirements. |

- 2.2 Take actions designed to ensure that your own work meets all relevant **regulatory requirements** and codes of practice.
- 2.3 Provide full reports about any failures to meet requirements to the relevant person.

RANGE STATEMENT

You must cover the items below:-

Element 1: Identify legal, regulatory, ethical and corporate social requirements

- A. Policies and Procedures (at least 2)
 - (i) Company
 - (ii) Conglomerates
 - (iii) Non-profit Organisations
 - (iv) Industry

Element 2: Fulfill the legal, regulatory and ethical requirements

- B. Regulatory Requirements (at least 2)
 - (i) Legal
 - (ii) National Standards & Certification
 - (iii) Occupational Health and Safety
- C. Ethical
 - (i) Codes of practice
 - (ii) Corporate social responsibility

UNDERPINNING KNOWLEDGE AND SKILLS

1. The importance of fulfilling legal, regulatory and ethical requirements, and the impact of failing to do so

Context specific knowledge and understanding

2. Policies and procedures that are intended to make sure that people meet the requirements
3. Procedures within the organisation for reporting any breaches of requirements
4. Legal, regulatory and ethical requirements impacting upon your marketing activities.
5. The emerging social concerns that are relevant to the sector and your marketing activities.

EVIDENCE GUIDE

(1) Critical Aspect of Evidence

You must provide evidence that shows you have met the performance criteria over a sufficient period of time for your assessor to consider that you are competent. You have to prove that you can meet all of the performance criteria on at least two (2) occasions. This evidence must come from working in a Marketing environment.

It is essential that competence be demonstrated in the following aspects:

- Follow company policies and procedures
- Follow the National Standards and regulations
- Practice the ethical requirements (**simulation – through the form of questioning**)
- Maintaining appropriate records
- Locating, interpreting and applying relevant legal requirements
- Submitting reports

(2) Method of Assessment

Assessment methods must confirm consistency of performance over time and in a range of workplace relevant contexts.

Assessment should be by direct observation of tasks and/or samples of work and questioning on underpinning knowledge.

- direct observation
- oral questioning
- written test
- testimonials from clients
- evaluation of qualifications/portfolio/awards/resume/workplace documents
- authenticated assessments and/or assignments from relevant training courses
- supporting statement from supervisor or previous employer

Assessment methods should closely reflect workplace demands and the needs of particular groups (e.g. people with disabilities, and people who may have literacy or numeracy difficulties).

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual workplace. However simulation can be accepted.

U13102: Resolve customer service problems

Unit Descriptor:

The delivery of excellent customer service involves meeting and exceeding customer expectations.

However, even if your customer service overall is excellent, some customers will experience problems. Part of your job is to help to resolve those problems.

Some problems are reported by customers. In other situations, you spot the problem first and resolve it before your customer has even noticed that there might be a problem.

For this unit you need to resolve both types of problems having looked at all the options.

This unit is particularly important to customer service because many customers judge the customer service of your organisation by the way in which their problems are resolved.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|---------------------------------------|---|
| 1. Identify customer service problems | <p>1.1 Gather and interpret information from your customers about problems they have raised.</p> <p>1.2 Ask your customers appropriate questions to check your understanding of their problems.</p> <p>1.3 Identify repeated problems and alert the appropriate authority.</p> <p>1.4 Share customer feedback with others to help identify potential problems before they occur.</p> <p>1.5 Work independently or with others to identify problems with systems and procedures before they begin to affect your customers.</p> |
|---------------------------------------|---|

2. Select the best solution to resolve customer service problems
 - 2.1 Identify the available options for resolving **customer service problems**.
 - 2.2 Consult with others to identify and confirm the options available to resolve those problems.
 - 2.3 Work out the advantages and disadvantages of each option for your customer and your organisation.
 - 2.4 Select the best overall option for your customer and your organisation.
 - 2.5 Suggest to your customer other ways that problems may be resolved if you are unable to help.
3. Implement the solution to customer service problems
 - 3.1 Discuss and agree the proposed option for solving the **problem** with your customers.
 - 3.2 Take action to implement the option agreed with your customers.
 - 3.3 Work with others and your customers to make sure that any commitments related to solving the problems are kept.
 - 3.4 **Keep your customers fully informed** about what is happening to resolve the problems.
 - 3.5 Check with your customers to make sure the problem has been resolved to their satisfaction.
 - 3.6 Give clear reasons to your customers when the problem has not been resolved to their satisfaction.

RANGE STATEMENT

You must cover the items below:

Element 1: Identify customer service problems (at least 3)**A. Types of problems:**

- (i) problems first identified by customers
- (ii) problems that you have identified before they affect your customer
- (iii) problems due to differences between your customers' expectations and what your organisation can offer
- (iv) problems due to a system or procedure failure
- (v) problems due to a lack of resources or human error

Element 2: Select the best solution to resolve customer service problems (at least 3)**B. Types of problems:**

- (i) problems first identified by customers
- (ii) problems that you have identified before they affect your customer
- (iii) problems due to differences between your customers' expectations and what your organisation can offer.
- (iv) problems due to a system or procedure failure
- (v) problems due to a lack of resources or human error

Element 3: Implement the solution to customer service problems (at least 3)**C. Types of problems:**

- (i) problems first identified by customers
- (ii) problems that you have identified before they affect your customer
- (iii) problems due to differences between your customers' expectations and what your organisation can offer
- (iv) problems due to a system or procedure failure
- (v) problems due to a lack of resources or human error

D. Keep your customers fully informed by:

- (i) supplying relevant information tactfully when customers have requested it
- (ii) supplying relevant information tactfully when customers have not requested it

UNDERPINNING KNOWLEDGE AND SKILLS**Legislation and regulations**

1. What are your customers' rights.
2. What are the specific aspects of:
 - a) health and safety
 - b) data protection
 - c) equal opportunities
 - d) disability discrimination, legislation and regulations that affect the way the products and services you deal with can be delivered to your customers
3. What are the industry, organisational and professional codes of practice and ethical standards that affect the way the products or services you deal with can be delivered to your customers.
4. What are the contractual agreements, if any; customers have with your organisation.

Products and services

5. What are the products or services of your organisation relevant to your customer service role.

Organisational procedures/guidelines

6. What are the guidelines laid down by your organisation that limits what you can do within your job.
7. What are the limits of your own authority and when do you need to seek agreement with or permission from others.
8. What are the organisational targets relevant to your job, your role in meeting them and the implications for your organisation if those targets are not met.

Communication

9. How would you communicate in a clear, polite, confident way and why this is important.

Additional Knowledge and understanding for Unit 4

10. What are the organisational procedures and systems for dealing with customer service problems.
11. What are the limitations of what you are able to offer your customer.
12. How to defuse potentially stressful situations.
13. How to negotiate.

EVIDENCE GUIDE

You must cover the items below:

1. Critical Aspects of Evidence

You must prove that you have dealt effectively with a series of customer service problems. You must produce evidence that shows you have done this over a period of time with different customers on different occasions.

Performance Evidence

Your evidence must include examples of solving problems involving **each** of the following:

- a. problems first identified by customers
- b. problems that you have identified before they affect your customer
- c. problems due to differences between your customers' expectations and what your organisation can offer
- d. problems due to a system or produce failure
- e. problems due to a lack of resources or human error

Your evidence will need to show that you:

- f. have made positive efforts to keep your customers informed at all times while problems are being solved
- g. supplied relevant information tactfully when customers have requested it
- h. supplied relevant information tactfully when customers have not requested it
- i. have used agreed organisational procedures when solving problems
- j. have made exceptions to usual practice with the agreement of others

All options you have considered must be based on the existing products or services offered by your organisation.

Your evidence must show that you have applied the knowledge and understanding requirements when you are dealing with your customers.

2. Methods of Assessment

Your customers can be internal or external to the organisation or a combination of both. The communication you have with your customer may be written, verbal or in some other form.

Your evidence must show that you have applied the knowledge and understanding requirements when you are dealing with your customers.

Occasions when a system or procedure has failed for example, relate to a network failure; computer breakdown; till/credit card machine problems; goods not delivered on time; somebody else has not passed information on.

Performance Evidence for this unit could include:

- Witness testimonies from managers or others describing how you have been able to effectively deal with a series of customers' problems over a period of time.
- Observation report by your assessor describing how you were able to sort out a customer's problem by gathering information and offering a range of options.

Supplementary Evidence for this unit could include:

- A case history which describes when you noticed that the same problem kept occurring and what action you took.
- A case history which describes how you identified a re-occurring problem and what action you took.
- Case histories which describe how you identified, solved and implemented solutions to internal or external customers' problems.
- A professional discussion with your assessor using examples of problems you have resolved before they could affect customers.

3. Context of Assessment

Simulation is **not** allowed for any performance evidence within this unit. You must supply all the evidence from work you have carried out with customers in your workplace.

U32203: Design, conduct and interpret Marketing Research

Unit Descriptor:

This is about defining the aims and objectives for market research projects. It includes ensuring that the appropriate techniques are used to collect, analyze and interpret data to achieve objectives as well as conduct basic research.

ELEMENT		PERFORMANCE CRITERIA	
		<i>To be competent you must achieve the following</i>	
1.	Identify need for research	1.1	Explore the circumstances creating the requirement for research, reviewing these with relevant individuals
		1.2	Analyse the marketing problem and define the key areas to be researched
2.	Determine research parameters	2.1	Design data collection and data analysis methodology.
		2.2	Identify the timescale and budget requirements for the proposed research, confirming that these are realistic
		2.3	Confirm with the relevant personnel the agreed purpose of the research
		2.4	Assist in preparing a brief
3.	Conduct basic research	3.1	Collect data in accordance with agreed methodology.
4.	Interpret and analyze research findings	4.1	Analyse the data collected using the appropriate method of assessment to achieve the research objectives, including where relevant, both verbal and non-verbal information.
5.	Present research findings	5.1	Identify appropriate audiences to communicate findings.
		5.2	Present findings in a format that is suitable to intended audience.

RANGE STATEMENT**A. Data (at least 2)**

- (i) Organisation records
- (ii) Client information
- (iii) Market trends
- (iv) Financial Records
- (v) Statistical Information
- (vi) Database

B. Methods of Assessment (at least 1)

- (i) Basic statistical methods
- (ii) Thematic Analysis (concepts)
- (iii) tools

C. Presentation Format

- (i) Multimedia
- (ii) Reports written
- (iii) Verbal reports

UNDERPINNING KNOWLEDGE AND SKILLS

1. An understanding of Marketing Research concepts and its purpose
2. Techniques for ensuring that data is prepared appropriately for analysis
3. The principles, strengths and limitations of a range of analysis techniques
4. How to select and use techniques which are appropriate to given research objectives
5. How to apply additional analysis techniques to mine data effectively for information
6. The importance of presenting data in a format understandable for the intended audience, and techniques for achieving this
7. The principles of appropriate information storage and how to apply these

Industry/Sector specific knowledge and understanding

8. Legal, regulatory and ethical requirements affecting market research

Context specific knowledge and understanding

9. The purpose and aims of the research, including how a problem has been defined and the information required by a given project being undertaken
10. The importance of defining carefully the problem that market research is to address, and how this can be achieved
11. Factors to consider when seeking to define the problem/issues to be researched
12. The principles, strengths and limitations of a range of approaches to research
13. The importance of involving the stakeholders fully in defining the problem, and in agreeing the purpose of the research

Context specific knowledge and understanding

14. The nature of the business problem to be addressed including the factors impacting upon it
15. Key stakeholders within the organisation involved in commissioning the research

EVIDENCE GUIDE**(1) Critical Aspect of Evidence**

You must provide evidence that shows you have done this over a sufficient period of time for your assessor to consider that you are competent. You have to prove that you can meet all of the performance criteria on at least two (2) occasions. This evidence must come from working in a Marketing environment.

It is essential that competence be demonstrated in the following aspects:

- Research data collected and analyzed
- The organisation's actual market research data and the key features of the findings.
- Processes for consultation within the organisation
- Written briefs
- Report

(2) Methods of Assessment

- Observation of work process
- Oral questioning
- Evaluation of Product of Work (research documents)
- Projects

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual workplace. However simulation can be accepted where evidence may be missing.

U32303: Manage your own resources and professional development

Unit Descriptor:

This unit is about managing your personal resources, particularly knowledge, understanding, skills, experience and time, and your professional development, in order to achieve your work objectives and your career and personal goals.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|---|---|
| 1. Evaluate personal goals and professional development | <ul style="list-style-type: none"> 1.1 Evaluate, at appropriate intervals, the current and future requirements of your work-role taking account of the vision and objectives of the organisation 1.2 Consider your values and your career and personal goals, and identify information which is relevant to your work role and professional development 1.3 Discuss and agree personal work objectives with those you report to and how you will measure progress. 1.4 Identify your preferred learning style(s) and ensure that you take this into account in identifying and undertaking development activities. 1.5 Identify any gaps between the current and future requirements of your work-role and your current knowledge, understanding and skills. |
| 2. Manage own resources and professional development | <ul style="list-style-type: none"> 2.1 Discuss and agree, with those you report to, a developmental plan to address any identified gaps in your current knowledge, understanding and skills and which supports your own career and personal goals and organisational objectives. |

- 2.2 Undertake the activities identified in your developmental plan and evaluate their contribution to your performance
- 2.3 Obtain regular and useful feedback on your performance from those who are in a good position to judge it and to provide objective and valid feedback.
- 2.4 Review and update your **personal work objectives** and developmental plan in the light of performance, any development activities undertaken and any wider changes.
- 2.5 Ensure that your performance consistently meets or goes beyond agreed requirements

RANGE STATEMENT

You must cover the items below

Element 1: Evaluate personal goals and professional development

A. Personal Work Objectives (at least 2)

- (i) Practical Skills
- (ii) Personal Skills
- (iii) Behavioral traits
- (iv) Career advancement

B. Learning Styles (at least 2)

- (i) Visual
- (ii) Auditory
- (iii) Kinesthetic
- (iv) Mixed

Element 2: Manage own resources and professional development

- C. Development activities (at least 3)
- (i) On-the-job coaching or mentoring
 - (ii) Formal course participation
 - (iii) Workshops / Seminars
 - (iv) Demonstrations
 - (v) Work Experience

UNDERPINNING KNOWLEDGE AND SKILLS

1. The principles which underpin professional development.
2. The importance of considering your values and career and personal goals, and how to relate them to your job role and professional development.
3. How to evaluate the current requirements of a work role and how the requirements may evolve in the future.
4. How to set appropriate objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound).
5. How to identify developmental needs to address any identified gaps between the requirements of your work-role and your current knowledge, understanding and skills.
6. Effective developmental planning, including what plans should contain and the length of time that it should cover
7. The range of different learning styles and how to identify the style(s) which work(s) best for you
8. The type of developmental activities which can be undertaken to address identified gaps in your knowledge, understanding and skills.
9. How to identify whether/how developmental activities have contributed to your performance.
10. How to update work objectives and developmental plans in the light of performance, feedback received, any developmental activities undertaken and any relevant changes.
11. How to monitor and evaluate your performance against the plans and requirements of your work role.
12. How to identify and use good sources of feedback on your performance.

Industry/Sector specific knowledge and understanding

13. Industry/sector requirements for the development or maintenance of knowledge, skills and understanding.

Context specific knowledge and understanding

14. The requirements of your work-role including the limits of your responsibility.
15. The vision and objectives of the organisation.
16. Your own values and career and personal goals.
17. Your personal work objectives.
18. Your personal development plan.
19. Available developmental opportunities and resources in the organisation.
20. The organisation's policy and procedures in terms of personal development.
21. Reporting lines in the organisation.

EVIDENCE GUIDE

The assessment process must address the following items of evidence.

(1) Critical Aspects of Evidence

It is essential that competence be demonstrated in the following aspects:

- Identify and document personal strengths and weaknesses
- Demonstrate the use of your preferred learning styles
- Demonstrate the application of constructive feedback
- Communicating priorities goals and actions
- Individual contribution to the professional development of team members. **(evidence to be provided through witness testimony)**

(2) Method of Assessment

Assessment methods must confirm consistency of performance over time and in a range of workplace relevant contexts.

Assessment should be by direct observation of tasks and/or samples of work and questioning on underpinning knowledge.

- direct observation
- oral questioning
- written test
- testimonials from clients
- evaluation of qualifications/portfolio/awards/resume/workplace documents
- authenticated assessments and/or assignments from relevant training courses
- supporting statement from supervisor or previous employer

Assessment methods should closely reflect workplace demands and the needs of particular groups (e.g. people with disabilities, and people who may have literacy or numeracy difficulties).

(3) Context of Assessment

Assessment must occur in a real or closely simulated workplace.

U32403: Identify and monitor competitors' marketing strategies and activities

Unit Descriptor:

This is about monitoring key competitors' marketing activities and evaluating the potential implications of these activities on your organisation. It includes assessing products/services, the corresponding opportunities and threats and recommending appropriate actions across the marketing mix to develop and/or protect your organisation's products/services.

ELEMENTS

PERFORMANCE CRITERIA

To be competent you must achieve the following:

- | | | | |
|----|--|-----|---|
| 1. | Identify competitors marketing strategies and activities | 1.1 | Identify those organisations competing for the same customers and who are therefore market competitors . |
| | | 1.2 | Gather information regarding competitors' market share, marketing strategies as well as production, operation / resources. |
| | | 1.3 | Assess gathered competitors' information to determine relative strengths and weaknesses as well as potential opportunities and threats to the organisation arising from their activities. |
| | | 1.4 | Map competitors' according to their strategies, based upon assessment of their activities and policies. |
| | | 1.5 | Identify and group competitors according to their strategies , based upon an assessment of competitor activities and policies. |
| 2. | Monitor competitor's marketing strategies and activities | 2.1 | Assess likely reactions by competitors to marketing initiatives by the organisation. |

- 2.2 Make recommendations regarding the relative importance of particular **competitors**, supported by a reasoned analysis of their **strategies** and activities
- 2.3 Present your recommendations to relevant colleagues promptly and clearly

RANGE STATEMENT

You must cover the items below:

Element 1: Identify competitors marketing strategies and activities

A. Market Competitors

- (i) local
- (ii) regional
- (iii) international

B. Strategies

- (i) price
- (ii) technology
- (iii) product / service
- (iv) location / place

UNDERPINNING KNOWLEDGE AND SKILLS

1. How to differentiate between competitors identified due to their being within the same industry, and those identified from their targeting the same customer groups and similar needs, and the relative advantages and disadvantages of each approach.
2. The dimensions to consider when grouping competitors according to their strategies, including competitor's product/service quality, features, marketing mix, pricing policy, distribution coverage and channels, sales force strategy, and marketing communications activities
3. The variety of sources and methods for collecting information regarding competitors, including primary research, secondary data and experiences from customer/supplier facing teams.
4. The importance of competitor information in informing marketing strategy and planning.
5. The role of benchmarking when comparing organisations' products/services and processes.
6. The importance of checking the validity of information and of differentiating between objective and subjective data.
7. Legal and ethical requirements regarding the collection, storage and use of data.

Industry/sector specific knowledge and understanding

8. Marketing developments in the organisation's sector, relevant to assessing the strengths and weaknesses of competitor strategies

Context specific knowledge and understanding

9. The organisation's marketing strategy, and its relevant products/services
10. Competitor organisations and their marketing strategies, and relevant products/services
11. The relative strengths and weaknesses of the organisation's principal competitors
12. The organisation's existing and potential customers, their needs and buying patterns relating to the organisation's products/services

EVIDENCE GUIDE**(1) Critical Aspects of Evidence**

You must provide evidence that shows you have done this over a sufficient period of time for your assessor to consider that you are competent. You have to prove that you can meet all of the performance criteria on at least two (2) occasions. This evidence must come from working in a Marketing environment.

It is essential that competence be observed in the following aspects:

- The organisation's marketing strategy relevant to the competitor's marketing activities
- The organisation's actual and potential competitors for the products/services, and their needs and expectations relating to the threats and opportunities
- The organisation's actual and potential competitors and the key features of their tactics.
- Colleagues and other key stakeholders, and their needs and expectations
- Processes for consultation within the organisation

(2) Methods of Assessment

- Observation of work process
- Oral questioning
- Evaluation of Product of Work
- Projects

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual workplace. However simulation can be accepted where evidence may be missing.

U32503: Implement distribution plan

Unit Descriptor:

This is about implementing a plan for the physical distribution of an organisation's products/services in line with an agreed distribution strategy. It includes contributing to evaluating the effectiveness of the plan and ensuring that all parties are clear regarding their roles and monitoring their performance in achieving targeted levels of customer service.

ELEMENT	PERFORMANCE CRITERIA
<i>To be competent you must achieve the following:</i>	
1. Coordinate implementation of a distribution plan	1.1 Identify an intermediary or intermediaries fitting the organisation's requirements . 1.2 Negotiate and contribute to agreeing contracts with the selected intermediary(ies), ensuring that terms are in line with the organisation's distribution strategy. 1.3 Agree customer service level targets for channel members .
2. Monitor distribution plan	2.1 Ensure that all distribution channel members are clear regarding their roles, goals and performance criteria. 2.2 Address correctly any conflict between the roles and goals of channel members. 2.3 Monitor the performance of channel members against agreed criteria, addressing promptly any variations from agreed roles, goals and the achieving of agreed customer service levels, in line with the organisation's requirements .

RANGE STATEMENT

You must cover the items below

A. Organisation's Requirements (at least 2)

- (i) customer service
- (ii) legal
- (iii) financial
- (iv) policies & regulations

B. Channel Member (at least 2)

- (i) Wholesalers
- (ii) Retailers
- (iii) Agents & Brokers
- (iv) Industrial Distributors
- (v) Distribution service forms

C. Conflict (at least 3)

- (i) Legal
- (ii) Internal Customer
- (iii) External Customer
- (iv) Ethical
- (v) Agents

UNDERPINNING KNOWLEDGE AND SKILLS

1. The role of distribution and its importance in fulfilling an organisation's overall marketing objectives
2. The importance of understanding the needs, problems, strengths and weaknesses of an organisation's distribution channel members
3. The importance of motivating channel members and methods for doing this
4. Criteria to be considered when determining channel members, for example, experience, expertise, reputation, range of products/services carried
5. The importance of establishing contracts and service level agreements with channel members, and what these might cover
6. How to develop measures and targets for monitoring and evaluating the performance of a distribution plan and channel members

Industry/Sector specific knowledge and understanding

7. Legal, regulatory and ethical requirements affecting the marketing and distribution of products/services within the organisation's sector

Context specific knowledge and understanding

8. The organisation's distribution plan relevant to the products/services under consideration
9. The roles, goals, and performance criteria of the organisation's channel members and how these relate to achieving the distribution plan and objectives
10. The needs, problems, strengths and weaknesses of the organisation's distribution channel members
11. The organisation's actual and potential customer base for the products/services, and their service needs
12. Colleagues and other key stakeholders, and their needs and expectations

EVIDENCE GUIDE

(1) Critical Aspect of Evidence

You must provide evidence that shows you have done this over a sufficient period of time for your assessor to consider that you are competent. You have to prove that you can meet all of the performance criteria on at least two (2) occasions. This evidence must come from working in a Marketing environment.

It is essential that competence be demonstrated in the following aspects:

- The organisation's distribution plan and the key features of their tactics
- The organisation's marketing strategy relevant to the products/services under consideration
- Colleagues and other key stakeholders, and their needs and expectations
- Processes for consultation within the organisation

(2) Methods of Assessment

Assessment methods must confirm consistency of performance over time and in a range of workplace relevant contexts.

Assessment should be by direct observation of tasks and/or samples of work and questioning on underpinning knowledge.

- direct observation
- oral questioning
- written test
- testimonials from clients
- evaluation of qualifications/portfolio/awards/resume/workplace documents
- authenticated assessments and/or assignments from relevant training courses
- supporting statement from supervisor or previous employer

Assessment methods should closely reflect workplace demands and the needs of particular groups (e.g. people with disabilities, and people who may have literacy or numeracy difficulties).

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual workplace. However simulation can be accepted where evidence may be missing.

U32603: Develop an advertising campaign

Unit Descriptor:

This is about preparing proposals towards achieving an agreed advertising strategy team to prepare aspects of the proposals, putting the proposals together and obtaining buy-in for the proposed actions from the organisation whose products/services are to be advertised. It also includes the effective execution and project management of approved proposals.

ELEMENT	PERFORMANCE CRITERIA
<i>To be competent you must achieve the following:</i>	
1. Develop an advertising campaign	1.1 Develop advertising objectives, budget and tactics. 1.2 Identify the resources and skills necessary to create the communications campaign. 1.3 Develop and communicate the brief to the potential advertising service providers. 1.4 Vetting and approving campaign proposals and associated budgets for advertising service providers. 1.5 Present proposals setting out clearly how the proposed campaign fulfills the brief and fits with the advertising and overall marketing strategies. 1.6 Present proposals, setting out clearly how the proposed campaign fulfils the brief, and fits with the advertising and overall marketing strategies.
2. Implement and monitor advertising campaign	2.1 Coordinate and monitor the progress of all member of the team, recognizing achievements and addressing promptly and correctly any variance to agreed schedules.

- 2.2 Ensure that relevant personnel within the organisation whose products/services are to be advertised are updated regarding the progress of the advertising team according to an agreed schedule.
- 2.3 Where relevant, obtain approval for materials from relevant bodies and stakeholders within agreed timescales
- 2.4 Create a working environment in which innovative ideas and creativity are encouraged
- 2.5 Manage costs according to agreed budgets, addressing and agreeing any variances in advance

RANGE STATEMENT

You must cover the items below:

Element 1: Develop an advertising campaign

A. Resources and Skills (at least 3)

- (i) human resources
- (ii) technical
- (iii) financial
- (iv) material
- (v) IT

UNDERPINNING KNOWLEDGE AND SKILLS

1. The role of advertising within an overall marketing strategy.
2. An understanding of the campaign production processes for television, press, print, on-line, digital and any other media.
3. The contents of an advertising brief and proposals.
4. The importance of creativity and innovation in developing advertising solutions.
5. The importance of reach, frequency and impact in achieving advertising objectives, and the relative advantages and limitations in these respects of the main advertising media types.
6. How to identify potential risks in relation to the achievement of objectives.
7. How to delegate responsibility and allocate resources to support an advertising proposal.
8. The importance of consulting with colleagues and other stakeholders during the development of the proposals and how to do this effectively.
9. How to develop measures and methods for monitoring and evaluating performance against the advertising strategy.
10. The importance of effective financial, project and time management.

Industry/Sector specific knowledge and understanding

11. Regulatory, ethical and code of practice requirements and their impact upon advertising practice in the organisation's sector.
12. Market developments in the organisation's sector.

Context specific knowledge and understanding

13. The market in which the organisation operates and its products/services.
14. The organisation's advertising objectives and strategy, and their fit within its overall marketing strategy.
15. The organisation's target customer base and its media habits.

16. The needs and expectations of the organisation's target customers.
17. The organisation's actual and potential competitors, and the key features of their advertising strategies.
18. Available skills and resources within the advertising team and service providers.
19. Colleagues and other key stakeholders, and their needs and expectations.
20. Processes for consultation within the organisation.

EVIDENCE GUIDE

The assessment process must address the following items of evidence

(1) Critical Aspects of Evidence

It is essential that competence be demonstrated in the following aspects:

- proposals
- briefing notes
- organisational communication
- team building strategy
- coordination and monitoring
- evaluation reports

(2) Method of Assessment

- oral
- oral questioning
- evaluation of products of work
- projects

(3) Context of Assessment

Assessment must occur in a real or simulated workplace

U32703: Develop a media plan for advertising products/services

Unit Descriptor:

This is about preparing a media plan in line with an agreed media strategy and which complements/enhances the creative solution.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|--------------------------------|---|
| 1. Develop a media plan | <ul style="list-style-type: none"> 1.1 Confirm the advertising objectives, budget and media strategy for the products/services to be advertised 1.2 Evaluate the media type(s) most appropriate towards realizing the advertising objectives. 1.3 Evaluate possible media vehicles, assessing their media impact and costs, taking into account the quality and attention of their audience |
| 2. Advertise products/services | <ul style="list-style-type: none"> 2.1 Determine the schedule and pattern of the advertising in line with advertising objectives and to ensure the cost effective spend of the advertising budget 2.2 Recommend and agree with key stakeholders the media type(s), vehicles and schedule preferred in realizing the advertising objectives 2.3 Forecast accurately the anticipated response outcomes from the media plan, and ensure that responses can be handled adequately 2.4 Establish monitoring procedures to confirm that agreed schedules are fulfilled |

- 2.5 Prepare an appropriate media plan in accordance with the budget, agreed advertising objectives and the media feature / evaluation.

RANGE STATEMENT

You must cover the items below

Element 1: Develop a media plan

A. Advertising Objectives (at least 2)

- (i) target customers
- (ii) nature of products and services
- (iii) types of message
- (iv) costs

B. Key stakeholders (at least 3)

- (i) clients/users
- (ii) manufacturers
- (iii) distributors
- (iv) media
- (v) agencies

UNDERPINNING KNOWLEDGE AND SKILLS

1. The role of advertising within an overall marketing strategy.
2. Key communications media to which customers are exposed, including, for example, the internet, television and magazines.
3. The importance of media planning to the success of an advertising strategy.
4. The areas to be addressed within a media plan.
5. The importance of reach, frequency and impact in achieving advertising objectives, and the relative advantages and limitations in these respects of the main advertising media types.
6. The role of each medium in a consumer's life, and when, where and in what mode each medium is normally consumed.
7. Different patterns within media scheduling and the circumstances when these are most effective.
8. How to identify potential risks in relation to the achievement of objectives.
9. The importance of examining regularly the relative impact and costs associated with different types of media, and vehicles within these, and how to do this.
10. The importance of consulting with colleagues and other stakeholders during the development of the media plan and the most appropriate and effective way to be done within the organization.
11. How to develop measures and methods for monitoring achievement of the media plan.

Industry/Sector specific knowledge and understanding

12. Regulatory, ethical and code of practice requirements impacting upon advertising practice in the organisation's sector.

Context specific knowledge and understanding

13. The market in which the organisation works and its products/services.
14. The organisation's target customers and their media habits.
15. The advertising strategy for the organisation's products/services.
16. The organisation's principal competitors, and the key features of their advertising strategies.
17. Colleagues and other key stakeholders, and their needs and expectations.

EVIDENCE GUIDE

(1) Critical Aspect of Evidence

You must provide evidence that shows you have met the performance criteria over a sufficient period of time for your assessor to consider that you are competent. You have to prove that you can meet all the performance criteria on at least two (2) occasions. This evidence must come from working in a Marketing environment.

It is essential that competence be demonstrated in the following aspect:

- Preparing and structuring media plan
- Researching competitors' media strategy
- Conducting meetings and presentations

(2) Method of Assessment

Assessment should involve:

- Observation
- Oral questioning
- Evaluation of products of work
- Evaluation of work place documents

(3) Context Assessment

The Unit should be assessed using evidence from the workplace, however simulation may be used.

U32803: Develop direct marketing plans

Unit Descriptor:

This unit is about developing direct marketing plans and associated budgets. It includes establishing and coordinating the messages to be communicated, agreeing the direct marketing media to be used, and piloting campaigns where required.

ELEMENT

PERFORMANCE CRITERIA

To be competent you must achieve the following:

- | | | |
|----|---|---|
| 1. | Identify components of the direct marketing plans | <ul style="list-style-type: none"> 1.1 Identify and prioritise direct marketing objectives consistent with the agreed direct marketing strategy 1.2 Define the needs and characteristics of target customers 1.3 Identify opportunities for tailoring products/services, and also the direct marketing communications, to address particular needs and characteristics of target customers. 1.4 Interrogate the external customer database to locate potential customers and identify those existing customers that match the characteristics of the target customers. 1.5 Evaluate potential marketing tools, channels and techniques and identify those best suited to achieve the objectives, and to address the needs of target customers taking into account costs, benefits and the calculated return on investment required. 1.6 Identify and agree the preferred tools and techniques, and determine the actions required to realise the direct marketing objectives. |
|----|---|---|

- 1.7 Identify any relevant test plans and their objectives.
 - 1.8 Assess and identify the **resources** required to achieve the actions within an agreed timescale, determining where particular **resources** may need to be sourced from a third party supplier(s).
2. Prepare direct marketing plan
- 2.1 Prepare and agree implementation plans which set out clearly the agreed actions, timescale and budget for achieving the objectives.
 - 2.2 Identify and agree procedures for monitoring progress against agreed budgets and schedules.
 - 2.3 Ensure that the direct marketing plan is in line with all aspects of the organisation's marketing communications and satisfies all relevant legal, industry and organisational guidelines.
 - 2.4 Present direct marketing plans in an appropriate format for approval from relevant personnel.

RANGE STATEMENT

You must cover the items below:

A. Characteristics

- (i) demographic
- (ii) gender
- (iii) age
- (iv) income Bracket
- (v) lifestyle factors

B. Marketing tools, channels and techniques (at least 1)

- (i) direct mail (flyers, brochures, letters)
- (ii) person to person
- (iii) business to business
- (iv) telephone
- (v) internet (texting, email website)

C. Resources

- (i) technical
- (ii) human
- (iii) physical
- (iv) financial

UNDERPINNING KNOWLEDGE AND SKILLS

1. What direct marketing is, as opposed to 'mass marketing', its relative benefits and limitations to organisations and their customers.
2. The role of direct marketing within an integrated organisational marketing strategy.
3. The principal direct marketing channels available, their relative merits, and the circumstances where organisations may prefer particular options.
4. The importance of and benefits to be derived from, a customer database for effective direct marketing.
5. The topics to be covered in a direct marketing plan.
6. How to identify potential risks in relation to achievement of the objectives.
7. The importance of determining and demonstrating anticipated key performance criteria and settling out a convincing justification in support of your case.
8. The importance of consulting with colleagues and other stakeholders during the development of the plan, and how to do this effectively.
9. How to develop measures and methods for monitoring and evaluating performance against the direct marketing plan.
10. The public, legal and ethical issues associated with direct marketing.

Industry/Sector specific knowledge and understanding

11. Legal, regulatory and ethical requirements in the organisation's sector.
12. Market developments in the organisation's sector.

Context specific knowledge and understanding

13. The market in which the organisation works.
14. The organisation's actual and potential customer base, and the extent of its existing customer database.
15. The needs and expectations of the organisation's actual and potential customers.
16. The organisation's actual and potential competitors and partners, and the key features of their strategies and plans.
17. New and available market opportunities.

18. The organisation's selling process and how the direct marketing plan will support this.
19. The importance of obtaining approval for implementation direct marketing plans.
20. Colleagues and other key stakeholders, and their needs and expectations.
21. Importance of feedback mechanism that can aid monitoring and evaluation.

EVIDENCE GUIDE

(1) Critical Aspect of Evidence

You must provide evidence that shows you have done this over a sufficient period of time for your assessor to consider that you are competent. You have to prove that they can meet all of the performance criteria on at least two (2) occasions. This evidence must come from working in a Marketing environment.

It is essential that competence be demonstrated in the following aspects:

- Preparation and structure of direct Marketing Plans
- Steps taken to reach direct Marketing Plans
- Identify and agreeing on procedures to monitor plans

Performance evidence must be provided for **all** of the range items

(2) Methods of Assessment

- Observation
- Oral questioning
- Evaluation of products of works e.g. (marketing plan / reports)
- Projects

(3) Context Assessment

The unit should be assessed using evidence from the workplace, however simulation may be used.

U32903: Coordinate sales promotion plans

Unit Descriptor:

This unit is about implementing sales promotion plans for an organisation's products/services. It includes monitoring of the sales promotion techniques and other promotional activities as well as implementing the appropriate corrective action.

ELEMENT	PERFORMANCE CRITERIA
<i>To be competent you must achieve the following:</i>	
1. Implement sales promotion plans	1.1 Ensure that all the sales team understand their roles and are committed to achieving agreed objectives. 1.2 Implement the sales promotion plan as agreed and within sales targets. 1.3 Use agreed methods to monitor the implementation and performance of the sales promotion programme against evaluation criteria and sales targets. 1.4 Identify promptly any variances, or problems associated with implementing the programme, and address these correctly, alerting relevant stakeholders where necessary.
2. Monitor sales promotion	2.1 Ensure that implementation of the sales promotion plan fulfils all relevant legislative requirements and codes of practice. 2.2 Maintain all required records accurately and correctly. 2.3 Evaluate any significant variances in performance, and recommend reasoned responses towards addressing the variances. 2.4 Assess and record how the sales promotion campaign has performed, in a way that will inform future marketing planning.

RANGE STATEMENT

You must cover the items below:

A. Relevant stakeholders

- (i) internal (managers/supervisors)
- (ii) external (customers, contractors, distributors, retailers)
- (iii) agents (sales promotion)

B. Records

- (i) budget
- (ii) customer
- (iii) sales

UNDERPINNING KNOWLEDGE AND SKILLS

1. The role of sales promotion, and its place within the marketing mix
2. The techniques implementing sales promotional campaigns
3. How to achieve strategic objectives which are SMART (Specific, Measurable, Achievable, Realistic, and Time-bound)
4. How to delegate responsibility and allocate resources to support a sales promotion strategy and plan
5. The importance of consulting with colleagues and other stakeholders during the implementation of the plan and how to do this effectively

Industry/Sector specific knowledge and understanding

6. Legal, regulatory and ethical requirements impacting upon sales promotions in the industry
7. Marketing developments in the industry

Context specific knowledge and understanding

8. The market in which the organisation works
9. The organisation's actual and potential customer base
10. The needs and expectations of the organisation's actual and potential customers
11. Colleagues and relevant stakeholders, the expectations of the team members and relevant stakeholders
12. Processes for consultation within the organisation
13. Sources of information that can aid monitoring and evaluation

EVIDENCE GUIDE**(1) Critical Aspect of Evidence**

You must provide evidence that shows you have done this over a sufficient period of time for your assessor to consider that you are competent. You have to prove that you can meet all of the performance criteria on at least two (2) occasions. This evidence must come from working in a Marketing environment.

It is essential that competence be demonstrated in the following aspects:

- The organisation's sales promotion plan
- The organization's sale promotion strategy relevant to the products/services, under consideration
- Report on the organisation's actual and potential customer base for the products/services, and their need and expectations relating to the products/services
- Present a report about the organisation's actual and potential competitors and the key features of their tactics.
- Present a report about the team member and the relevant stakeholders and their needs and expectations

(2) Methods of Assessment

- Observation of work process
- Oral questioning
- Evaluation of Product of Work (e.g. sales promotion plans, budgets, reports and minutes)
- Projects

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual workplace. However simulation can be accepted where evidence may be missing.

U33003: Operate a company database

Unit Descriptor:

This unit deals with the skills and knowledge required to operate database applications and perform operations.

ELEMENT	PERFORMANCE CRITERIA
<i>To be competent you must achieve the following:</i>	
1. Maintain a database	1.1 Enter data accurately, link and navigate tables correctly. 1.2 Create a primary key as well as establish an index. 1.3 Modify table layout and field attributes as required. 1.4 Modify data in tables appropriately for information requirements. 1.5 Add and delete appropriate records as required. 1.6 Close down system correctly following procedures to ensure that data is not lost.
2. Create reports	2.1 Design the report in a manner that data is presented in a logical sequence. 2.2 Modify reports appropriately to include/exclude additional information requirements. 2.3 Modify existing reports to accommodate current information requirements using the correct procedures and carried out by authorized personnel. 2.4 Distribute reports in a suitable format (softcopy/hardcopy) in accordance with approved procedures.
3. Retrieve information	3.1 Retrieve records from existing database in accordance with standard procedures.

- 3.2 Create a query to retrieve records based on single or multiple criteria applying the appropriate filters in accordance with correct procedures.
- 3.3 Refine queries to retrieve information more precisely.
- 3.4 Select appropriate **data** and sort according to information retrieval requirements.

RANGE STATEMENT

You must cover the items below:

Element 1: Change and maintain a database

A. Data (at least 2)

- (i) products / services
- (ii) demographic information
- (iii) market trends
- (iv) financial records
- (v) transaction history

B. Reports (at least 1)

- (i) finance
- (ii) performance (products/services, sales, variances and trends)
- (iii) customer

UNDERPINNING KNOWLEDGE AND SKILLS

1. basic technical terminology in relation to reading help files and prompts
2. login procedures relating to accessing a PC
3. procedures which address security, private legislation, copyright and virus protection within an organisation
4. access and retrieve information
5. create report in suitable formats
6. modify data to meet information requirements
7. legal, regulatory and ethical requirements for data protection

EVIDENCE GUIDE**(1) Critical Aspect of Evidence**

You must provide evidence that shows you have done this over a sufficient period of time for your assessor to consider that you are competent. You have to prove that you can meet all of the performance criteria on at least two (2) occasions. This evidence must come from working in a Marketing environment.

It is essential that competence be observed in the following aspects:

- modifying tables layout and field attributes
- modifying data and records to meet information requirements
- accessing and retrieving data
- navigating through tables
- exiting database without loss of data
- following information control procedures

(2) Methods of Assessment

- observation
- oral questioning
- evaluation of Products of Work
- projects

(3) Context of Assessment

Assessment must occur in a real or simulated workplace.

U33103: Manage a marketing budget

Unit Descriptor:

This is about having responsible for, a budget for a defined area of marketing. It includes preparing, submitting and agreeing a budget for a set operating period, monitoring actual performance against the agreed budget, and taking necessary action in response to identified variances and any unforeseen developments.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|---|--|
| 1. Assist in preparing marketing budget | <ul style="list-style-type: none"> 1.1 Evaluate available information and consult with internal and external parties to prepare a realistic budget for the area of marketing 1.2 Submit budget proposals the relevant people in the organisation for approval, and assist with the overall financial planning process. 1.3 Discuss and, if appropriate, negotiate the proposed budget, with the relevant people in the organisation and agree the final marketing budget. |
| 2. Manage marketing budget | <ul style="list-style-type: none"> 2.1 Actively monitor and control performance and for the area of marketing, according to the agreed budget 2.2 Provide ongoing information on performance against the budget to relevant people in the organisation. 2.3 Identify the causes of any significant variances between what was budgeted and what actually happens and take prompt corrective action, obtaining agreement from the relevant people if required. |

- 2.4 Advise relevant people as soon as possible if you have identified evidence of potentially fraudulent activities.
- 2.5 Propose revisions to the budget, if necessary, in response to variances and/or significant or unforeseen developments, and discuss and agree the revisions with the relevant people in the organisation.
- 2.6 Evaluate the performance of the marketing budget and assist in preparation of future budgets.

RANGE STATEMENT

You must cover the items below

Element 1: Determine marketing Budget

A. Budget (at least 3)

- (i) sales
- (ii) sales and promotions
- (iii) advertising
- (iv) public relations
- (v) research
- (vi) other marketing expenditure (sponsorship etc)

B. Relevant people (at least 3)

- (i) marketing
- (ii) finance
- (iii) public relations
- (iv) human resources
- (v) sales
- (vi) external parties

UNDERPINNING KNOWLEDGE AND SKILLS

1. The purposes of budgetary systems.
2. From where to obtain, and how to evaluate, the available information necessary to prepare a realistic budget.
3. The importance of spending time on and consulting with others in preparing a budget.
4. How to discuss, negotiate and confirm a budget with people who control the finance and the key factors that should be covered.
5. How to use a budget to actively monitor and control performance for a defined area or activity of work.
6. The main causes of variances and how to identify them.
7. What different types of corrective action could be taken to address identified variances.
8. How unforeseen developments can affect a budget and how to deal with them.
9. The importance of agreeing revisions to the budget and communicating the changes.
10. The importance of providing regular information on performance against the budget to other people.
11. Types of fraudulent activities and how to identify them.
12. The importance of evaluating the budget to identify information and lessons for the preparation of future budgets.

Industry/Sector specific knowledge and understanding

13. Factors, processes and trends that are likely to affect the setting of budgets in the industry/sector.

Context specific knowledge and understanding

14. The area or activity for which the budget is intended.
15. The vision, objectives and operational plans for your area of responsibility.
16. The budgeting period(s) used in the organisation.
17. Organisational guidelines and procedures for the preparation and approval of budgets, and for monitoring and reporting of performance against budgets and revising budgets.
18. The agreed marketing budget, how it can be used and how much it can be changed without approval.
19. The limits of your authority.

20. Who needs information in the organisation about performance against the budget, what information they need, when they need it and in what format.
21. What to do and who to contact if you suspect fraud has been committed.

EVIDENCE GUIDE

(1) Critical Aspect of Evidence

You must provide evidence that shows you have met the performance criteria over a sufficient period of time for your assessor to consider that you are competent. You have to prove that you can meet all of the performance criteria on at least two (2) occasions. This evidence must come from working in a Marketing environment.

It is essential that competence be demonstrated in the following aspects:

- Negotiating, developing and **preparing** and implementing budgets according to policies and procedures of the business.
- Documented evidence of corrective actions of income and expenditure where budget variances have occurred.
- Over a period of time, consistently produce **performance** reports to standard business requirements.
- Over a period of time consistently implement policy and procedures for the reporting and recording of budgetary and financial information within an operational area.

(2) Method of Assessment

Assessment methods must confirm consistency of performance over time and in a range of workplace relevant contexts.

Assessment should be by direct observation of tasks and/or samples of work and questioning on underpinning knowledge.

- direct observation
- oral questioning
- written test
- testimonials from clients
- evaluation of qualifications/portfolio/awards/resume/workplace documents
- authenticated assessments and/or assignments from relevant training courses
- supporting statement from supervisor or previous employer

Assessment methods should closely reflect workplace demands and the needs of particular groups (e.g. people with disabilities, and people who may have literacy or numeracy difficulties).

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual workplace. However simulation can be accepted.

U33203 : Encourage innovation

Unit Descriptor:

This unit is about encouraging and supporting the identification and practical implementation of ideas in your area of responsibility. The initial ideas will come primarily from people who work within your area of responsibility, including yourself, and will focus on:

- new products and/or services
- improvements to existing products/services
- improvements to existing practices, procedures, systems, ways of working etc, within the team or those of the wider organisation, or customers or suppliers.

ELEMENT

PERFORMANCE CRITERIA

To be competent you must achieve the following:

- | | |
|---|--|
| 1. Identify new ideas for products / services | <p>1.1 Establish and operate a fair and open innovative system for identifying, considering and selecting initial ideas for further development</p> <p>1.2 Motivate all of the people working in your area to identify ideas for new products and/or services and improvements, and other potential sources of ideas, and encourage the sharing of this information.</p> <p>1.3 Respond enthusiastically to ideas from individuals or teams and provide constructive feedback.</p> <p>1.4 Discuss and agree ways in which selected ideas can be further developed and tested by individuals or teams.</p> <p>1.5 Provide ongoing support, encouragement and resources to individuals and teams engaged in the further development and testing of ideas, and help to remove any identified obstacles.</p> <p>1.6 Periodically review the approach to and level of innovation within your area of responsibility.</p> |
|---|--|

- | | | | |
|----|---|-----|---|
| 2. | Implement new ideas for products / services | 2.1 | Identify, in discussion with the relevant individuals and teams , those ideas which could be implemented practically, providing help in drawing up and submitting business cases and plans in support of ideas |
| | | 2.2 | Approve the practical implementation of ideas , based on the identified benefits, risks and required resources, when you have the authority to do so, and monitor and review their progress |
| | | 2.3 | Champion business cases and plans for ideas submitted by individuals and teams from your area to other people in the organisation and communicate progress and decisions |
| | | 2.4 | Encourage individuals and teams in your area to take acceptable risks in pursuing innovation and to make and learn from mistakes |
| | | 2.5 | Ensure that the originators and developers of any ideas which are successfully implemented receive recognition for their achievement |

RANGE STATEMENT

You must cover the items below:

A. Innovation Systems (at least 2)

- (i) storage / retrieval
- (ii) communication
- (iii) monitoring / evaluation
- (iv) recognition / rewards

B. Ideas (at least 2)

- (i) New products / services
- (ii) Improvements products / services
- (iii) Improvement to practices, procedures, systems

C. Relevant Individuals and Teams (at least 2)

- (i) Team members
- (ii) Managers
- (iii) Customers
- (iv) Agents

UNDERPINNING KNOWLEDGE AND SKILLS

1. The benefits of innovation to the organisation, customers and other stakeholders
2. The difference between creativity and innovation
3. How to identify the current approach to and level of innovation in a particular area, including any strengths that can be built upon, any weaknesses that need to be addressed and any obstacles to innovation that need to be removed
4. How to select and apply different methods for motivating people to generate and develop ideas
5. The different potential sources of ideas for new products and/or services and improvements
6. The importance of communication in innovation and how to encourage communication across your area of responsibility
7. The potential obstacles to creativity and innovation and how they can be removed
8. Key stages in the creative process
9. Key stages in the innovation process
10. How to provide constructive feedback on ideas to teams and individuals
11. How to establish and operate fair and open innovation systems for selecting initial ideas for further development, including providing reasons why particular ideas are not being taken forward
12. The range of ways in which initial ideas can be further developed and tested including setting guidelines or parameters for the use of resources, the level of acceptable risk and the reporting of progress
13. How to recognise and manage risk in innovation
14. How to develop a business case and plans for the practical implementation of an idea and how to support others in doing this

15. The characteristics/traits/competencies of creative people and how to recognise these
16. How to unlock creativity in yourself and others
17. The resources required for creativity and innovation, particularly time
18. How to learn from mistakes
19. How to recognise the achievements of the originators/developers of ideas which have been implemented successfully

Industry/Sector specific knowledge and understanding

20. The sector(s) in which the organisation works
21. Information sources on innovation in the sector(s)
22. Current and emerging political, economic, social, technological, environmental and legal developments in the sector(s) and in related sectors

Context specific knowledge and understanding

23. The organisation's strategy, if it has one, for innovation
24. The approach to and level of innovation in your area of responsibility
25. The role of innovation in the organisation's culture
26. Organisational guidelines and procedures for developing and implementing ideas
27. The limits of your authority
28. The needs of your customers

EVIDENCE GUIDE

The assessment process must address the following items of evidence

(1) Critical Aspect of Evidence

You must provide evidence that shows you have done this over a sufficient period of time for your assessor to consider that you are competent. You have to prove that they can meet all of the performance criteria on at least two (2) occasions. This evidence must come from working in a Marketing environment.

It is essential that competence be demonstrated in the following aspects:

- Communicating ideas
- Testing ideas
- Conducting meetings
- Submit reports
- Present business cases/plans

(2) Methods of Assessment

- Observation
- Oral questioning
- Evaluation of Product of Work
- Projects

(3) Context of Assessment

Assessment must occur in a real or closely simulated workplace.

U33303: Participate in product and service development

Unit Descriptor:

This is about contributing to the development of potential products/services. It includes liaising with research and development teams, testing new product ideas and covers the managing, screening and trialing of new ideas and concepts. It also includes developing business cases, and evaluating feasibility studies for new products/services

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | | | |
|----|---|-----|--|
| 1. | Research opportunities for new product / service | 1.1 | Agree on a new product strategy which is understood and supported by your team, gives clear directions towards generating ideas, and is in line with the overall marketing objectives. |
| | | 1.2 | Generate ideas for potential new products/services. |
| | | 1.3 | Manage systems for screening which identify cost effectively those ideas with potential, and which are in line with marketing objectives, and discard others. |
| | | 1.4 | Test potential ideas effectively. |
| | | 1.5 | Assess the market and profit potential of potential new products/services, based upon valid forecasting and analysis of the marketing environment |
| 2. | Develop a product / service proposal to meet market opportunity | 2.1 | Take decisions for the development of new products / services or for the modification of existing products/service. |
| | | 2.2 | Evaluate competing products / services. |
| | | 2.3 | Adapted or created formulas / specifications to produce new product / service. |
| | | 2.4 | Determine methods of assembly, testing and presentation. |

- 2.5 Consult with R & D personnel for product / service requirements.
- 2.6 Determine the feasibility of the products / service and its distribution
- 2.7 Make decisions to commercialise the product / service

RANGE STATEMENT

You must cover the items below:

A. Product / service development (at least 2)

- (i) work is carried out according to company policies and procedures, regulatory and licensing and patenting requirements, legislative requirements, and industrial awards and agreements.
- (ii) adaption of existing product / service
- (iii) innovation / new product / service based on formulas / recipes / specifications
- (iv) evaluation of competing products relies primarily on sampling

B. Evaluation of products /services may be based on (at least 2)

- (i) Intention to buy
- (ii) Preferred products / services
- (iii) Target group acceptance

C. Testing and presentation (at least 1)

- (i) Product testing
- (ii) Market testing

UNDERPINNING KNOWLEDGE AND SKILLS

1. sources of information on local market, products/service range and performance of similar products
2. the desired level of product / service quality to meet business and customer expectations
3. the minimum standards and methods used to produce products / services relevant to the business and customers.
4. availability of materials, resources, technology, production and processing and process equipment required for products / services
5. safety issues related to production, presentation ,storage and handling of products / services
6. methods of gaining customer feedback including taste testing, sampling and trials
7. basic knowledge of fixed and variable costs, profit margin and sale price range
8. basic awareness of trade practice issues when pricing products
9. communication skills required to research and present information
10. trade and economic issues related to sales and delivery of product/services
11. the competitors and their products / services as well as trade practices
12. identify market demography relevant to product/services
13. determine product development opportunities and feasibilities
14. identify the main specifications and methods used to produce/service
15. modify existing specifications to produce required product / service
16. determine product presentation
17. cost product/service
18. product / service product proposal

EVIDENCE GUIDE**(1) Critical Aspect of Evidence**

You must provide evidence that shows you have done this over a sufficient period of time for your assessor to consider that you are competent. You have to prove that you can meet all of the performance criteria on at least two (2) occasions. This evidence must come from working in a Marketing environment.

It is essential that competence be demonstrated in the following aspects:

- Evaluation of competing products
- Determination of the market demographics
- Report on product develop opportunities
- Presentation about requirements of products and services
- Product proposal presentation

(2) Methods of Assessment

- Observation of work process
- Oral questioning
- Evaluation of Product of Work (reports, finished products / services, minutes)

(3) Context of Assessment

Assessment must occur in a real or simulated workplace.