



Technical and Vocational Education and Training (TVET) Council



**Occupational Standards
of Competence**

Marketing Management

Level 4

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Qualification Overview
NVQB
in
Marketing Management
Level 4

NVQ in Marketing Management – Level 4

Qualification Overview

The NVQB Marketing Management Level 4 is designed for marketing managers who are responsible for the marketing activities and marketing strategy of their organisation.

The qualification covers the required knowledge and skills to manage the marketing budget, plan and implement campaigns to track their success and report back to senior management. Workers at this level must demonstrate competence in the ability to identify, select and use relevant technology to complete tasks and procedures in a broad range of situations and address complex problems with autonomy and judgment. They are also expected to demonstrate leadership, teamwork and critical thinking skills and must be capable of generating ideas through analysing information and concepts and demonstrate diagnostic and creative skills in a range of technical, professional and management functions.

Like all N/CVQs, this qualification is competence based. This means that it is linked to a candidates' ability to competently perform a range of tasks connected with their work. Candidates must plan a programme of development and assessment with their assessor and compile a portfolio of evidence to prove that they are competent in their work role.

Who is the qualification for?

Being a Marketing Manager requires in-depth experience of marketing. Typical responsibilities might include, but are not limited to:

- Developing and implementing the operational marketing strategy, key marketing campaigns and stakeholder engagement plans to deliver against key business objectives
- Delivering data and evidence driven decision-making through commissioning reliable research
- Tracking and reporting on marketing/sales data to inform senior management decision-making
- Establishing marketing goals based on campaign analysis, product/service performance and market forecasts
- Managing the marketing budget
- Approving and overseeing the creative development of a range of marketing materials/channels
- Managing relationships with key stakeholders to support marketing delivery and corporate reputation.

Jobs within the occupational sector

Persons may be in job roles such as:

- Marketing Manager
- Marketing Executive
- Account Manager/Executive

A09604 -APPROVED NATIONAL VOCATIONAL QUALIFICATION STRUCTURE

MARKETING MANAGEMENT - LEVEL 4

To achieve the full qualification, candidates must complete all seventeen (17) mandatory units.

<u>Mandatory Units (All must be completed)</u>	<u>CODES</u>
1. Contribute to the protection of the environment	U68402
1.1 Work in an environmentally conscious way	
1.2 Contribute to continuous improvements in protecting the environment	
2. Practise health, safety, security and hygiene	U54902
2.1 Follow health, safety and security practices	
2.2 Deal with emergency situations	
2.3 Follow hygiene procedures	
2.4 Identify and prevent hygiene risks	
3. Provide leadership in own area of responsibility	U57402
3.1 Provide leadership within own area of responsibility	
3.2 Provide support to persons in own area of responsibility	
4. Design, conduct and interpret marketing research	U32203
4.1 Identify the need for research	
4.2 Determine research parameters	
4.3 Conduct basic research	
4.4 Interpret and analyse research findings	
4.5 Present research findings	
5. Manage a marketing budget	U33103
5.1 Contribute to preparing a marketing budget	
5.2 Manage a marketing budget	
6. Develop working relationships with stakeholders and organisations	UA33804
6.1 Identify stakeholders and their relevance to the organisation	
6.2 Establish working relationships with stakeholders	
6.3 Create an environment of trust and mutual respect	
6.4 Establish networks and relationships	
6.5 Interact with other organisations	
6.6 Monitor and control marketing stakeholder relationships	

<u>Mandatory Units (All must be completed)</u>	<u>CODES</u>
7. Use digital technology for marketing purposes	UA33904
7.1 Use digital tools for marketing purposes	
7.2 Carry out marketing research using the internet	
7.3 Create digital marketing devices and messages	
7.4 Use digital technology for social media marketing purposes	
8. Design and develop an integrated communication plans	UA34004
8.1 Develop marketing communications objectives	
8.2 Determine the marketing communications mix	
8.3 Set a promotional budget	
8.4 Select and recommend media for a marketing strategy	
8.5 Prepare an integrated marketing communication plan	
9. Develop and implement a marketing plan	UA34104
9.1 Assess the market	
9.2 Develop a marketing plan	
9.3 Implement a marketing plan	
9.4 Evaluate the effectiveness of a marketing plan	
10. Implement and evaluate marketing campaigns and activities	UA34204
10.1 Implement marketing campaigns and activities	
10.2 Evaluate the performance of marketing campaigns and activities	
11. Develop and implement a customer insight strategy	UA34304
11.1 Develop a customer insight strategy	
11.2 Implement a customer insight strategy	
11.3 Evaluate a customer insight strategy	
12. Develop and manage brand identity and strategy	UA34404
12.1 Establish the brand purpose	
12.2 Establish brand identity	
12.3 Influence customer perception	
12.4 Demonstrate brand identity	
12.5 Manage corporate reputation	
13. Contribute to the development of new products, services and pricing policy	UA34504
13.1 Assess marketing opportunities for new products and/or services	
13.2 Develop new products and/or services	
13.3 Develop and implement a pricing policy for new products and/or services	

Mandatory Units (All must be completed)

CODES

- | | | |
|------------|--|----------------|
| 14. | Coordinate the production of brochures and marketing materials | UA34604 |
| 14.1 | Plan the production of brochures and marketing materials | |
| 14.2 | Produce information for inclusion | |
| 14.3 | Obtain quotations for artwork and printing | |
| 14.4 | Develop a final copy for brochures and marketing materials | |
| 14.5 | Coordinate the production of brochures and marketing materials | |
| 15. | Establish and adjust the marketing mix | UA34704 |
| 15.1 | Evaluate the significance of each component of the marketing mix and their inter-relationship. | |
| 15.2 | Determine the marketing mix for specific markets | |
| 15.3 | Monitor and adjust the marketing mix | |
| 16. | Forecast and review marketing performance | UA34804 |
| 16.1 | Forecast marketing performance | |
| 16.2 | Review marketing performance | |
| 17. | Evaluate the performance of marketing activities | UA34904 |
| 17.1 | Evaluate the market | |
| 17.2 | Monitor and improve marketing performance | |

U68402**Contribute to the protection of the environment**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to conduct work activities in a manner that protects the environment. Candidates should take steps to minimise any negative impact on the environment by completing tasks and activities in a way which causes as little damage or disturbance as possible to the environment while following organisational procedures.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|--|---|
| 1. Work in an environmentally conscious way | 1.1 Perform duties in accordance with relevant policies and legislation . |
| | 1.2 Execute duties in a manner which minimises environmental damage . |
| | 1.3 Operate and handle equipment and materials in a manner that minimises environmental damage . |
| 2. Contribute to continuous improvements in protecting the environment | 2.1 Identify instances of likely or actual environmental damage and take appropriate action. |
| | 2.2 Identify improvements to procedures and practices in terms of good environmental practice and report to relevant persons. |
| | 2.3 Dispose of hazardous and non-hazardous waste safely according to approved legislative procedures and practices. |
| | 2.4 Contribute to sustainable development particularly in the conservation of energy, water, use of resources and equipment to minimise environmental damage. |

RANGE STATEMENT

All range statements must be assessed:

1. Relevant policies and legislation:

- Organisational policies
- Health and safety at work
- Environmental legislation
- Solid waste management policies
- Recyclable policies

2. Manner which minimises environmental damage:

- Using recycled/reused items and materials where appropriate
- Disposing of polluting substances safely
- Reducing the volume of waste
- Using biodegradable and eco-friendly chemicals
- Planning tasks to reduce the use of fuel and electricity

3. Equipment and materials

- Hand tools
- Power tools
- Personal protective equipment
- Cleaning chemicals
- Soaps and sanitisers
- Paper towels
- Garbage disposal bags
- Cloths and towels
- Containers
- Access equipment

4. Hazardous waste:

- Oils
- Chemicals and solutions
- Harmful materials (asbestos, fiberglass)
- Electronic equipment
- Organic hazards (pest excrement, pest carcasses)

5. Non-hazardous waste:

- Food
- Plant matter
- Paper

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. What are the relevant policies and legislation governing environmental protection.
2. How to recognise any likely or actual environmental damage.
3. What are the appropriate actions to take in the discovery of likely or actual environmental damage.
4. What are the ways in which tools and materials should be used in order to minimise environmental damage.
5. What are the different types of pollution.
6. What are the consequences of pollution.
7. How to recognise wastage of energy, water, equipment and materials.
8. What are the methods of working that will minimise pollution and wastage of resources.
9. What are the types of damage which may occur, the impact these can have on the environment and corrective actions to be taken.
10. What are the methods of waste disposal which will minimise the risk to the environment.
11. What are the organisational requirements to prevent wastage.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** the elements, meeting **all** of the performance criteria, range and underpinning knowledge **on no less than three (3) occasions**. This evidence must come from a real working environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Witness testimony
- Personal statement
- Written evidence (projects or assignments)
- Case study and scenario analysis
- Role play/simulation

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency

(3) Context of Assessment

This unit may be assessed on the job, off the job or using a combination of both. Where assessment occurs off the job, that is, the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, products and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **must not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

U54902

Practise health, safety, security and hygiene

Unit Descriptor:

This unit describes the knowledge, skills and attitudes required to coordinate health, safety and hygiene requirements to function effectively and efficiently. It details the outcomes required to comply with regulatory and organisational requirements for health, safety and hygiene including dealing with emergency situations and maintaining safe personal presentation standards.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|---|--|
| 1. Follow health, safety and security practices | 1.1 Follow health, safety and security procedures in line with legislation, regulations and organisational procedures.
1.2 Identify and report obstacles to health, safety and security procedures.
1.3 Report suspicious behaviour or unusual occurrences in accordance with standard operating procedures. |
| 2. Deal with emergency situations | 2.1 Identify emergency and potential emergency situations.
2.2 Take appropriate action to deal with recognised emergency situations within the individual's scope of responsibility.
2.3 Seek assistance from colleagues to resolve or respond to emergency situations.
2.4 Report details of emergency situations according to industry requirements. |
| 3. Follow hygiene procedures | 3.1 Implement workplace hygiene procedures in a manner appropriate for the workplace.
3.2 Handle and store items with care according to industry requirements. |
| 4. Identify and prevent hygiene risks | 4.1 Identify potential hygiene risks .
4.2 Take actions within the scope of your own authority to minimise and/or remove risks . |

- 4.3 Report hygiene risks beyond own control to the appropriate person.

RANGE STATEMENT

All range statements must be assessed:

1. Health, safety and security procedures:

- Use of personal protective clothing and equipment
- Safe work techniques
- Safe handling of chemicals and dangerous materials
- Ergonomically sound workstations
- Emergency, fire and accident
- Hazard identification and control
- Security of documents, cash, equipment, people
- Key control systems

2. Obstacles:

- Loss of keys
- Strange or suspicious persons
- Broken or malfunctioning equipment
- Loss of property, goods or materials
- Damaged property
- Lack of suitable signage
- Lack of training on health and safety issues
- Unsafe work practices

3. Emergency:

- Personal/client injuries
- Fire
- Electrocution
- Natural disasters
- Criminal acts

4. Hygiene procedures:

- Avoidance of cross contamination
- Handling and disposal of linen and laundry
- Handling and disposal of garbage
- Cleaning and sanitising procedures
- Personal hygiene

5. Hygiene risks:

- Infectious linen
- Cross contamination
- Personal hygiene practices
- Poor work practices
- Cleaning
- Housekeeping
- Airborne dust

6. Minimise and/or remove risks:

- Auditing staff skills
- Provide training
- Organisational policies and procedures
- Follow up actions for audits or incidents

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. What are the hygiene and control procedures in the industry.
2. What factors contribute to workplace hygiene problems.
3. How to handle linen, laundry and garbage to avoid cross contamination and infection.
4. When and how to apply hygiene principles.
5. How to communicate effectively on health, safety, security and hygiene matters.
6. What are the relevant workplace health, safety, emergency and security procedures.
7. How to correctly dispose of garbage.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** of the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Oral questioning
- Observation
- Written evidence (case study, projects, assignments)
- Witness testimony

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency

(3) Context of Assessment

This unit may be assessed on the job, off the job or using a combination of both. Where assessment occurs off the job, that is, the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, products and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances, where natural work evidence is unlikely to occur.

U57402**Provide leadership in own area of responsibility**

Unit Descriptor:

This unit describes the knowledge, skills and attitudes required to provide direction to persons in a defined area, whilst motivating and supporting them to achieve the vision and objectives for that area.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | | |
|---|--|---|
| 1 | Provide leadership within own area of responsibility | 1.1 Motivate and encourage persons within your area of responsibility to define the direction and commit themselves to achieving results. |
| | | 1.2 Communicate shared vision and values of the organisation clearly and enthusiastically to relevant persons. |
| | | 1.3 Communicate the link between the vision, objectives and operational plans of own area of responsibility and those of the overall organisation clearly and confirm that these are understood by persons within your area of responsibility. |
| | | 1.4 Lead your own area of responsibility successfully through difficulties, challenges and times of crisis. |
| | | 1.5 Develop and use a range of leadership styles appropriately in situations and when dealing with others. |
| | | 1.6 Motivate persons to present ideas and provide feedback to show that they are heard and understood. |
| 2 | Provide support to persons in own area of responsibility | 2.1 Encourage persons to identify and take responsibility for their own development needs. |
| | | 2.2 Provide persons with support, advice and guidance when they need it, especially during periods of setback and change. |

- 2.3 Motivate and support persons to achieve their work and development objectives and give recognition for their successes.
- 2.4 Encourage persons to take the lead in their own area of responsibility when they have the knowledge and expertise and show a willingness to accept leadership.
- 2.5 Achieve the trust and support of persons across the organisation and key stakeholders through your own performance and behaviour.
- 2.6 Seek feedback regularly on own performance from persons across the organisation and key stakeholders.

RANGE STATEMENT

All range items must be assessed:

1. Communicate:

- Verbally
- In writing
- Visually

2. Leadership styles:

- Collaborative – facilitate interaction
- Democratic – draw on peoples knowledge
- Coaching – developing individuals
- Affiliated – emphasising team work
- Autocratic – in times of crisis

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. Who the individuals are within your area of responsibility, their roles, responsibilities, competences and potential.
2. What are your own values, motivations and emotions.
3. What are your strengths and limitations in the leadership role.
4. What are your role, responsibilities and level of authority.
5. How to engage persons within the organisation and other stakeholders' area of responsibility, in defining the organisation's direction and obtaining commitment to achieving results.
6. What are the differences between managing and leading.
7. What are the vision, objectives and culture of the overall organisation.
8. What are the vision, objectives, culture and operational plans for your area of responsibility.
9. How to create a compelling vision for own area of responsibility.
10. What are organisational values and why these are important.
11. What are the different leadership styles and how to select and apply these to different situations and persons.
12. What are the leadership styles used across the organisation.
13. What are the different techniques and methods for communicating with persons across the organisation and how these should be applied.
14. How to select and successfully apply different methods for communicating with people across your area of responsibility.
15. How to obtain and make use of feedback from persons on own leadership performance.
16. What are the strengths, limitations and potential of people that you lead.
17. What are the types of difficulties and challenges that may arise and ways of identifying and addressing them.
18. How to support and nurture a culture which encourages and recognises creativity and innovation.
19. Why it is important to encourage others to take the lead and the ways in which this can be achieved.
20. How to effectively empower persons in your area of responsibility.
21. How to select and successfully apply different methods for encouraging, motivating and supporting persons and recognising achievement.
22. What types of support and advice persons are likely to need and how to respond to these.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out all of the elements, meeting **all** of the performance criteria, range and underpinning knowledge **on more than two occasions over a period of time**.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

- Direct observation
- Oral/written questioning
- Written evidence
- Witness testimony
- Professional discussion

Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by an individual working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **must not be used** except in exceptional circumstances where natural work evidence is unlikely to occur.

U32203**Design, conduct and interpret marketing research**

Unit Descriptor:

This unit describes the knowledge, skills and attitudes required to define the aims and objectives for market research projects. It includes ensuring that the appropriate techniques are used to collect, analyse and interpret data to achieve objectives as well as conduct basic research.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|--|---|
| 1. Identify the 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 relevant personnel the agreed purpose of the research. |
| | 2.4 Assist in preparing a brief according to organisational procedures. |
| 3. Conduct basic research | 3.1 Collect data in accordance with agreed methodology. |
| 4. Interpret and analyse research findings | 4.1 Analyse 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 the intended audience. |

RANGE STATEMENT

All range statements must be assessed:

1. Data:

- Organisational records
- Client information
- Market trends
- Financial records
- Statistical information
- Database

2. Methods of Assessment:

- Basic statistical methods
- Thematic analysis (concepts)
- Tools

3. Presentation format

- Multimedia
- Written reports
- Verbal reports

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. What is marketing research, its concepts and purpose.
2. What are the techniques for ensuring that data is prepared appropriately for analysis.
3. What are 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. Why it is important to present data in an understandable format for the intended audience and the techniques for achieving this.
7. What are the principles of appropriate information storage and how to apply them.
8. What are the legal, regulatory and ethical requirements affecting market research.
9. What are the purpose and aims of the research, including how the problem has been defined and the information required by a given project is being undertaken.
10. Why it is important to carefully define the problem that market research is to address and how this can be achieved.
11. What are the factors to be considered when seeking to define the problem/issues to be researched.
12. What are the principles, strengths and limitations of a range of approaches to research.
13. Why it is important to fully involve stakeholders in defining the problem and in agreeing the purpose of the research.
14. What is the nature of the business problem to be addressed including the factors impacting it.
15. Who are the key stakeholders within the organisations involved in commissioning the research.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** the elements, meeting **all** of the performance criteria, range and underpinning knowledge **on no less than three (3) occasions**. This evidence must come from a real work environment. It is essential that competence be demonstrated in the following:

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

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Witness testimony
- Personal statement
- Written evidence (projects or assignments)
- Case study and scenario analysis
- Role play/simulation

Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or using a combination of both. Where assessment occurs off the job, that is, the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, products and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **must not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

U33103**Manage a marketing budget**

Unit Descriptor:

This unit describes the knowledge, skills and attitudes required to manage a marketing budget for a defined area. 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. | Contribute to preparing marketing budget | 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 to relevant persons in the organisation for approval and assist with the overall financial planning process. |
| | | 1.3 | Discuss and, if appropriate, negotiate the proposed budget with relevant persons in the organisation and agree the final marketing budget. |
| 2. | Manage a marketing budget | 2.1 | Monitor and actively control performance for the area of marketing, according to the agreed budget. |
| | | 2.2 | Provide ongoing information on performance against the budget to relevant persons 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 persons if required. |
| | | 2.4 | Advise relevant persons as soon as possible of 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 with **relevant persons** in the organisation.
- 2.6 Evaluate the performance of the marketing **budget** and assist in preparation of future **budgets**.

RANGE STATEMENT

All range statements must be assessed:

1. Budget:

- Sales
- Sales and promotions
- Advertising
- Public relations
- Research
- Other marketing expenditure (sponsorship etc.)

2. Relevant persons:

- Marketing
- Finance
- Public relations
- Human resources
- Sales
- External parties

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. What is the purpose of budgetary systems.
2. Where to obtain and how to evaluate necessary available information to prepare a realistic budget.
3. What is the importance of spending time on and consulting with others in preparing a budget.
4. How to discuss, negotiate and confirm a budget with persons 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. What are the main causes of variances and how to identify them.
7. What are the different types of corrective action that can be taken to address identified variances.
8. How unforeseen developments can affect a budget and how to deal with them.
9. Why it is important to agree revisions to a budget and communicate the changes.
10. Why it is important to provide regular information on performance against the budget to other persons.
11. What are the different types of fraudulent activities and how to identify them.
12. What is the importance of evaluating the budget to identify information and lessons for the preparation of future budgets.
13. What are the factors, processes and trends that are likely to affect the setting of budgets in the industry/sector.
14. What is the area or activity for which the budget is intended.
15. What are the vision, objectives and operational plans for your area of responsibility.
16. What are the budgeting periods used in the organisation.
17. What are the organisational guidelines and procedures for the preparation and approval of budgets, and for monitoring and reporting of performance against budgets and revising budgets.
18. What is the agreed marketing budget, how it can be used and how much it can be changed without approval.
19. What are 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

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** the elements, meeting **all** of the performance criteria, range and underpinning knowledge **on no less than three (3) occasions**. This evidence must come from a real work environment. It is essential that competence be demonstrated in the following:

- Negotiating, developing, 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) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Witness testimony
- Personal statement
- Written evidence (projects or assignments)
- Case study and scenario analysis
- Role play/simulation

Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or using a combination of both. Where assessment occurs off the job, that is, the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, products and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **must not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA33804**Develop working relationships with stakeholders and organisations**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to develop effective working relationships with stakeholders and organisations.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|--|---|
| 1. Identify stakeholders and their relevance to the organisation | 1.1 Identify and document relevant stakeholders in accordance with the marketing plan and organisational requirements. |
| | 1.2 Evaluate and record the roles, responsibilities, interests and concerns of stakeholders in accordance with the marketing plan objectives. |
| | 1.3 Assess and document the importance of identified stakeholders in relation to the marketing plan objectives. |
| 2. Establish working relationships with stakeholders | 2.1 Identify and document common goals, potential synergies and potential conflict between stakeholders and the organisation. |
| | 2.2 Develop and implement appropriate communication plans in accordance with organisational requirements and marketing plan. |
| | 2.3 Clarify and agree a common sense of purpose with relevant stakeholders in relation to the marketing plan objectives. |
| | 2.4 Discuss and agree with relevant stakeholders , how to create an environment of trust and mutual respect in accordance with the marketing plan. |
| 3. Create an environment of trust and mutual respect | 3.1 Review and document the needs and motivations of relevant stakeholders in accordance with organisational requirements. |

- 3.2 Demonstrate interaction with **stakeholders** that shows respect for the views and actions of others in accordance with the organisational procedures.
- 4. Establish networks and relationships
 - 4.1 Identify and document external organisations required to support organisational requirements.
 - 4.2 Develop networks with other organisations to support liaison and collaboration, following organisational procedures and the marketing plan.
 - 4.3 Develop and record relationships that provide benefit to the organisation from shared expertise, information and/or resources in accordance with the marketing plan objectives and organisational requirements.
- 5. Interact with other organisations
 - 5.1 Communicate with other organisations in a clear, concise and comprehensive manner following organisational procedures and **communication plan**.
 - 5.2 Participate in meetings and forums that support cooperation in accordance with the organisational requirements.
 - 5.3 Identify and consult with **stakeholders** that are affected by the outcomes of the interaction between organisations.
 - 5.4 Gather information from other organisations to inform the improvement of interaction and avoid duplication of efforts.

6. Monitor and control marketing stakeholder relationships
- 6.1 Select and document the **methods** used to monitor the on-going effectiveness of **stakeholder** relationships, in accordance with the marketing plan objectives.
 - 6.2 Use key performance indicators and success criteria to monitor the effectiveness of **stakeholder** relationships in accordance with marketing plan objectives.
 - 6.3 Evaluate and document how changes in the **market environment** in which the **stakeholders** operate, impacted their relationship with your organisation.
 - 6.4 Review and compile a report on the effectiveness of the collaborative arrangements with **stakeholders**, in accordance with the marketing plan objectives and organisational requirements.

RANGE STATEMENT

All range statements must be assessed:

1. Stakeholders:

- Internal customers (managers, colleagues)
- External customers (contractors, distributors, retailers)
- Investors
- Clients
- Shareholders

2. Conflict:

- Internal
- External

3. Communication plans:

- Service level agreements
- Frequency of updates
- Roll out plan

4. Methods:

- Surveys
- Focus groups/stakeholder meetings
- Newsletter updates
- Annual review
- Ad-hoc contact (phone calls, emails)
- Account management

5. Market environment:

- PESTE (Political, economic, social, technological, ethical)
- Legal
- Competitors

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. Why it is important to identify and document the relevant stakeholders in accordance with the marketing plan and requirements and how to do so.
2. Why it is important to evaluate and record the roles, responsibilities, interests and concerns of stakeholders in accordance with the marketing plan objectives and how to do so.
3. Why it is important to assess and document the importance of identified stakeholders in relation to the marketing plan objectives and how to do so.
4. What are some of the potential synergies and potential conflicts that can exist between organisations.
5. Why it is important to identify and document common goals, potential synergies and potential conflict between stakeholders and the organisation and how to do so.
6. What is a communication plan.
7. Why it is important to develop and implement appropriate communication plans in accordance with the organisation's requirements and marketing plan and how to do so.
8. Why it is important to clarify and agree a common sense of purpose with the relevant stakeholders in relation to the marketing plan objectives and how to do so.
9. Why it is important to discuss and agree with relevant stakeholders on how to create an environment of trust and mutual respect.
10. Why it is important to review and document the needs and motivations of relevant stakeholders in accordance with organisational requirements.
11. Why it is important to demonstrate interaction with stakeholders that shows respect for the views and actions of others in accordance with organisation's procedures and how to do so.
12. How to identify and document external organisational requirements.
13. How to develop networks with other organisations to support liaison and collaboration, following organisational procedures and the marketing plan.
14. How to develop and record relationships that provide benefit to the organisation from shared expertise, information and/or resources in accordance with the marketing plan objectives and organisational requirements.
15. How to communicate with other organisations in a clear, concise and comprehensive manner following organisational procedures and communication plan.
16. How to participate in meetings and forums that support cooperation, in accordance with organisational requirements.
17. When to identify and consult with stakeholders that are affected by the outcomes of the interaction between organisations, in accordance with organisational requirements and how to do so.
18. How to gather information from other organisations to inform the improvement of interaction and to avoid duplication of effort, following internal organisational procedures.

19. How to use key performance indicators and success criteria to monitor the effectiveness of stakeholder relationships in accordance with marketing plan objectives.
20. What are the methods used to monitor the effectiveness of stakeholder relationships.
21. How to select and document the methods used to monitor the on-going effectiveness of stakeholder relationships, in accordance with the marketing plan objectives.
22. Why it is important to evaluate and document how changes in the market environment in which the stakeholders operate impact their relationship with your organisation.
23. How to conduct a review and compile a report on the effectiveness of the collaborative arrangements with stakeholders in accordance with the marketing plan objectives and organisational requirements.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA33904**Use digital technology for marketing purposes**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to use digital tools for marketing purposes, carry out marketing research using the internet, devise digital marketing devices and messages and use digital technology for social media marketing purposes.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|--|--|
| 1. Use digital tools for marketing purposes | 1.1 Create digital marketing publicity that optimises the use of search engines. |
| | 1.2 Evaluate the cost-effective use of Pay Per Click (PPC) facilities in accordance with organisational procedures. |
| | 1.3 Confirm the consistency and relevance of 'Meta Tags' to the marketing message, in accordance with organisational requirements. |
| | 1.4 Confirm that website content is keyword-rich. |
| | 1.5 Use offsite Search Engine Optimisation (SEO) in a way that meets the marketing strategy. |
| 2. Carry out marketing research using the internet | 2.1 Adapt and use browser facilities and search engines to identify required marketing information. |
| | 2.2 Mine and extract marketing data using multiple selection criteria in accordance with the research specifications. |
| | 2.3 Identify marketing trends, patterns and opportunities from multiple-table relational databases. |
| 3. Create digital marketing devices and messages | 3.1 Specify a Customer Relationship Management (CRM) system that can identify customer buying preferences and patterns. |

- 3.2 Create a range of digital marketing devices that are targeted on identified market segments.
 - 3.3 Create response systems appropriate for each marketing device.
 - 3.4 Use tracking systems that can add value to marketing information databases.
- 4. Use digital technology for social media marketing purposes
 - 4.1 Use CRM systems to identify target customers.
 - 4.2 Use the digital medium that is most appropriate for the marketing message to be conveyed.
 - 4.3 Adopt writing and visual styles that are best suited to the chosen digital marketing medium.
 - 4.4 Integrate the use of multiple digital tools and devices to optimise their marketing potential.
 - 4.5 Present non-standard marketing reports and recommendations that are supported by statistical evidence.

RANGE STATEMENT

All range statements must be assessed:

1. Marketing data:

- Website traffic leads
- Online conversation rates
- Returning visitors
- Demographics
- Buying patterns and behaviours
- Search engine optimisation (SEO)/Search engine marketing (SEM)

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. How to create digital marketing publicity that optimises the use of search engines.
2. Why it is important to evaluate the cost-effective use of Pay Per Click (PPC) facilities and how to do so.
3. What are Meta Tags.
4. Why it is important to confirm the consistency and relevance of Meta Tags to the marketing message and how to do so.
5. Why it is important to confirm that website content is keyword-rich.
6. How to use offsite Search Engine Optimisation (SEO) in a way that meets the marketing strategy.
7. What are the response systems in SEO activities.
8. What are the benefits and risks of a Link strategy.
9. How to adapt and use browser facilities and search engines to identify required marketing information.
10. Why it is important to have a knowledge of various platforms and how they suit various organisations.
11. How to mine and extract marketing data using multiple selection criteria in accordance with the research specification.
12. Why it is important to identify marketing trends, patterns and opportunities from multiple-relational databases and how to do so.
13. What are the strengths and weaknesses of a range of tools and techniques to search the internet.
14. What are the different ways of saving marketing information and the sources of marketing information.
15. How do intellectual property rights affect the use of marketing information downloaded from the internet.
16. How to specify a Customer Relationship Management (CRM) system that can identify customer buying preferences and patterns.
17. How to create a range of digital marketing devices that are targeted on identified market segments.
18. How to create response systems appropriate for each marketing device.
19. How to use tracking systems that are capable of adding value to marketing information databases.
20. How to use a CRM system to identify target customers.

21. Why it is important to use the digital medium that is most appropriate for the marketing message to be conveyed and how to do so.
22. What are the strengths and weaknesses of a range of digital technologies for marketing purposes.
23. What precautions to take to prevent marketing messages being identified as “Spam”
24. How to adopt writing and visual styles that are best suited to the chosen digital marketing medium.
25. Why it is important to integrate the use of multiple digital tools and devices to optimise their marketing potential and how to do so.
26. What are the techniques for increasing hits on social networking sites.
27. Why it is important to present non-standard marketing reports and recommendations that are supported by statistical evidence and how to do so.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA34004

Design and develop an integrated communications plan

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to carry out the preparation and development of an integrated marketing communications plan to enable the effective and efficient promotion of products and services to specific markets.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | | | |
|----|---|-----|--|
| 1. | Develop marketing communications objectives | 1.1 | Obtain comprehensive client and product information in accordance with the marketing plan and organisational requirements. |
| | | 1.2 | Review the outcomes of previous marketing communications of the organisation. |
| | | 1.3 | Identify and review the target market and available media in accordance with organisational requirements. |
| | | 1.4 | Identify the criteria to be used in an integrated marketing communications analysis . |
| | | 1.5 | Review and select forms of promotion that are best suited to the product, service or idea in accordance with the marketing plan. |
| | | 1.6 | Determine the marketing communications objectives and write a draft marketing promotional brief in accordance with organisational requirements. |
| | | 1.7 | Develop promotional appeals and messages to meet the requirements of the promotional brief in accordance with the marketing plan. |
| 2. | Determine the marketing communications mix | 2.1 | Evaluate and identify marketing communications models and select a model to meet organisational requirements. |

- 2.2 Explore and document the relationship between the market and promotions mix.
 - 2.3 Determine the likely elements of primary and secondary promotions in accordance with organisational requirements.
 - 2.4 Select a marketing communications mix that best suits the target market and meets marketing plan objectives
3. Set a promotional budget
 - 3.1 Evaluate general economic and business environmental factors in terms of their effect on the **promotional budget** allocation in accordance with the marketing plan.
 - 3.2 Allocate a marketing communications budget in accordance with the overall marketing budget.
 - 3.3 Establish marketing communications implementation and control procedures in accordance with organisational requirements.
4. Select and recommend media for a marketing strategy
 - 4.1 Select media vehicles that match the requirements of the marketing brief for the product or service in accordance with the marketing plan.
 - 4.2 Select and recommend primary and secondary marketing media that meet target audience preferences in accordance with the marketing plan and organisational requirements.
 - 4.3 Select and recommend media that meet the marketing brief, client's requirements, and legal and ethical constraints.
5. Prepare an integrated marketing communications plan
 - 5.1 Define and document the elements of an integrated marketing communications plan in accordance with organisational requirements.

- 5.2 Evaluate and document the direct and indirect forms of marketing communications in relation to marketing communications objectives.
- 5.3 Identify and evaluate primary and secondary forms of marketing communications in accordance with the marketing plan and organisation requirements.
- 5.4 Evaluate and document the institutional, product, service and idea promotions for inclusion in the marketing communications plan.
- 5.5 Develop and evaluate the objectives of the marketing communications plan for effectiveness against the forms that are possible and for cost-effectiveness.
- 5.6 Prepare the marketing communications plan in accordance with the overall marketing plan and ensure that it meets organisational requirements.

RANGE STATEMENT

All range statements must be assessed:

1. Integrated marketing communications analysis:

- Effect on intermediaries
- Pre and post awareness research
- Data obtained from marketing information systems
- Sales and profitability
- Reach and frequency data

2. Communications objectives:

- Internal and external
- Consumer needs
- Benefits
- Product or service usage
- Demographics
- Lifestyle
- Social and cultural factors
- Business characteristics
- Marketing activities of the organisation

3. Promotional budget:

- Interest rates and cost of capital
- Credit availability
- Forecast trends of size, growth, age, income and distribution of population
- Business and competitor characteristics
- Influence of technology on the operations and services of the organisation's business costs
- Cost of various media

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. Why it is important to obtain comprehensive client and product information in accordance with the marketing plan and organisational requirements and how to do so.
2. Why it is important to review the outcomes of previous organisational marketing communications and how to do so.
3. Why it is important to identify and review the target market and available media in accordance with organisational requirements and how to do so.
4. Why it is important to identify the criteria to be used in an integrated marketing communications analysis and how to do so.
5. How to review and select forms of promotions that are best suited to the product, service or idea in accordance with the marketing plan.
6. Why it is important to determine the marketing communication objectives to write a draft marketing promotional brief in accordance with organisational requirements and how to do so.
7. How to develop promotional appeals and messages to meet the requirements of the promotional brief in accordance with the marketing plan.
8. What are the marketing communication models.
9. Why it is important to evaluate and identify marketing communications models, select one that meets organisational requirements and how to do so.
10. What are the components of a marketing and a promotional mix
11. Why it is important to explore and document the relationship between the market and promotions mix and how to do so.
12. What are the elements of primary and secondary promotions.
13. Why it is important to determine the likely elements of primary and secondary promotions in accordance with organisational requirements and how to do so.
14. What is a marketing communications mix.
15. How to select a marketing communications mix that best suits the target market and meets marketing plan objectives.
16. What are general and business environmental factors.
17. Why it is important to evaluate general economic and business environmental factors in terms of their effect on the promotional budget allocation in accordance with the marketing plan.
18. How to allocate a marketing communications budget in accordance with the overall marketing budget.
19. Why it is important to establish marketing communications implementation and control procedures in accordance with organisational requirements.

20. How to select media vehicles that match the requirements of a marketing brief for product or service in accordance with the marketing plan.
21. What primary and secondary marketing media to select and recommend that meet target audience preferences in accordance with the marketing plan and organisational requirements and how to do so.
22. Which media to select and recommend that meet the marketing brief, client's requirements, and legal and ethical constraints and how to do so.
23. Why it is important to define and document the elements of an integrated marketing communications plan in accordance with organisational requirements and how to do so.
24. How to evaluate and document the direct and indirect forms of marketing communications in relation to marketing communications objectives.
25. How to identify and evaluate primary and secondary forms of marketing communications.
26. How to evaluate and document institutional, product, service and idea promotions for inclusion in the marketing communications plan.
27. How to develop and evaluate the objectives of the marketing communications plan for effectiveness against the forms that are possible and for cost-effectiveness.
28. How to prepare the marketing communications plan in accordance with the overall marketing plan and ensure that it meets organisational requirements.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA34104**Develop and implement a marketing plan**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to develop a marketing plan for the implementation of marketing activities. It includes taking account of information from a marketing audit, where this is appropriate; confirming marketing objectives and the agreed budget for marketing activities; agreeing the overall approach to carrying out marketing activities and producing a plan which contains all necessary elements.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|----------------------|--|
| 1. Assess the market | <ul style="list-style-type: none"> 1.1 Identify the legal, regulatory and ethical requirements relating to the organisation's implementation of marketing activities. 1.2 Identify and document the way in which the market operates, including any barriers to trade or entry. 1.3 Conduct a marketing audit of the environment and outlook of the selected market in accordance with the marketing plan. 1.4 Evaluate the results of the marketing audit to assess the needs of the market for products or services and associated opportunities for the organisation. 1.5 Determine how potential customers in the chosen market perceive and use the types of products or services offered by the organisation. 1.6 Evaluate the marketing audit to determine the potential impact on the market of cultural or behavioural factors. 1.7 Identify and record the potential competitors in the market based on the results of the marketing audit. |
|----------------------|--|

- 1.8 Assess and document the strengths and weaknesses of potential competitors' **marketing** strategies and tactics.
 - 1.9 Identify and assess opportunities and threats for the organisation based on a realistic market assessment of current business strengths and weaknesses.
 - 1.10 Identify and assess the political, technological, social and economic factors which may influence the selected market.
2. Develop a marketing plan
- 2.1 Identify the objectives to be achieved by the **marketing plan** and organisational plan.
 - 2.2 Identify the characteristics of the target markets to facilitate the **marketing plan**.
 - 2.3 Identify the **resources** required to achieve the market potential.
 - 2.4 Consult with appropriate sources of expertise to obtain additional relevant information.
 - 2.5 Provide opportunities for colleagues to contribute to the **marketing plan**.
 - 2.6 Define the priorities, responsibilities, timelines and budgets in the **marketing plan** and communicate to appropriate colleagues.
 - 2.7 Evaluate the different **methods** of achieving the objectives of the **marketing plan**.
 - 2.8 Specify and document the **methods**, actions, **resources**, timescales, milestones, budget and success criteria in accordance with the **marketing plan**.
 - 2.9 Produce a forecast of Return on Investment (ROI) based on relevant data obtained from the **marketing audit**.
 - 2.10 Obtain and use feedback from **stakeholders** to enhance the **marketing plan**.

- 2.11 Set out a strategy for developing the market, including costs and benefits of possible options.
 - 2.12 Present and agree the business case and **marketing** proposals with decision makers.
 - 2.13 Gain commitment for the **marketing plan** through discussion and collaboration from the relevant **stakeholders**.
 - 2.14 Establish monitoring and evaluation procedures that are capable of generating evaluative information.
3. Implement a marketing plan.
- 3.1 Develop an implementation plan that specifies objectives, actions, responsibilities, budget, timescale and success criteria.
 - 3.2 Identify and obtain the human, physical and financial **resources** required to implement the **marketing plan**.
 - 3.3 Brief personnel on their roles and responsibilities in accordance with the **marketing plan**.
 - 3.4 Confirm the availability of agreed **marketing resources** with relevant internal and external **stakeholders**.
 - 3.5 Deliver the requirements of the plan within the budget and timescale and in accordance with the **marketing plan**.
 - 3.6 Address risks, problems and variances from expectations in accordance with the **marketing plan**.
 - 3.7 Implement and monitor actions detailed in the **marketing plan** in a cost-efficient manner and according to schedule and contingencies.
 - 3.8 Keep **stakeholders** up to date with progress, developments and issues in accordance with the **marketing plan**.

- 3.9 Share information with operational staff on marketing activities to maintain awareness of current organisational focus.
- 3.10 Record and report on the outcomes of the implementation in accordance with the **marketing plan** and organisational procedures.
- 4. Evaluate the effectiveness of a marketing plan.
 - 4.1 Establish an **evaluation framework**, in accordance with the **marketing plan** and organisational procedures.
 - 4.2 Evaluate and document **marketing** activities using agreed **methods** and benchmarks in accordance with the **marketing plan**.
 - 4.3 Agree evaluation resources with **stakeholders** in accordance with the **marketing plan** requirements.
 - 4.4 Gain **stakeholders'** agreement to the methods, tools and techniques that are most suited to carry out the evaluation.
 - 4.5 Use agreed methods to evaluate quantitative and qualitative data against agreed success criteria and in accordance with the **marketing plan**.
 - 4.6 Evaluate the impact of the **marketing plan** against agreed objectives and criteria
 - 4.7 Evaluate the quality, cost-effectiveness and cost-efficiency of the **marketing** activity against the agreed criteria of the **marketing plan**.
 - 4.8 Identify and analyse the reasons for variances in performance from expectations in accordance with the **marketing plan**.
 - 4.9 Recommend actions to address possible variances in accordance with the **marketing plan**.

- 4.10 Report on the findings of the evaluation in the agreed format to relevant **stakeholders** in accordance with the **marketing plan** and organisational procedures.
- 4.11 Communicate and implement agreed changes in accordance with the **marketing plan** and organisational procedures.
- 4.12 Use evaluation results to inform future strategic planning.

RANGE STATEMENT

All range statements must be assessed:

1. Marketing:

- Business-to-business marketing
- Direct marketing
- Ideas marketing
- Marketing of goods
- Marketing of goods, products and services

2. Marketing audit:

- Macro environment audit (demographic, economic, environmental, political, cultural)
- Task environment audit (e.g. markets, customers, competitors, distributors and retailers, facilitators, marketing firms, public)
- Marketing strategy audit (Business mission, marketing objectives and goals, marketing strategies)
- Marketing organisation audit
- Marketing systems audit (e.g. marketing information system, marketing plan system, marketing control system, new product development system)
- Marketing productivity audit
- Marketing function audit (e.g. product, price, distribution, marketing communications, sales force)

3. Marketing plan:

- Market research and analysis
- Purpose and mission statement
- Marketing strategy (marketing mix)
- Tactical marketing programmes
- Forecasts and budgets
- Implementation plan
- Monitoring and evaluation procedures

4. Resources:

- Financial
- Human
- IT
- Physical
- Technical

5. Methods:

- SMART goals
- Increase in sales or profit
- Improving brand and product awareness
- Targeting new customers
- Enhance customer relationships

6. Stakeholders:

- Board of directors, owners
- Finance staff
- Human resource staff
- IT staff
- Managers, supervisors
- Marketing personnel
- Customer service personnel

7. Evaluation framework:

- A baseline (Starting point)
- Realistic and achievable objectives
- Key performance indicators and success criteria
- Process and impact evaluation mechanisms
- Feedback and communication mechanisms
- Mechanisms for calculating return on investment

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. What are the legal, regulatory and ethical requirements relating to the organisation's implementation of marketing activities.
2. Why it is important to identify and document the way in which the market operates, including any barriers to trade or entry and how to do so.
3. How to conduct a marketing audit of the environment and outlook of the selected market.
4. Why it is important to assess the needs of the market for products and/or services and associated opportunities for the organisation and how to do so.
5. How to determine how potential customers in the chosen market perceive and use the types of products or services offered by the organisation.
6. Why it is important to evaluate the results of the marketing audit to assess the needs of the market for products or services and associated opportunities for the organisation and how to do so.
7. How to identify and record potential competitors in the market based on results of the marketing audit.
8. What is a SWOT analysis.
9. How to assess and document the strengths and weaknesses of potential competitors' marketing strategies and tactics.
10. How to identify and assess opportunities and threats for the organisation based on a realistic market assessment of current business strengths and weaknesses.
11. Why it is important to identify and assess the political, technological, social and economic factors which may influence the selected market and how to do so.
12. What are the objectives to be achieved by the marketing plan and organisational plan.
13. What are the characteristics of the target market(s).
14. How to identify the physical, human and financial resources required to achieve the market potential.
15. Why it is important to consult with appropriate sources of expertise to obtain additional relevant information and when and how to do so.
16. Why you should provide opportunities for colleagues to contribute to the marketing plan and how to do so.
17. Why it is important to define the priorities, responsibilities, timelines and budgets in the plan and communicate the information to appropriate colleagues and how to do so.
18. What are the different methods of achieving the market objectives of the marketing plan.
19. What are the specific methods, actions, resources, timescales, milestones, budget and success criteria of the marketing plan.
20. What is a Return on Investment (ROI).

21. Why it is important to produce a forecast of Return on Investment (ROI) and how to do so.
22. Why it is important to obtain and use feedback from stakeholders to enhance the marketing plan and how to do so.
23. How to set out a strategy for developing the market, including costs and benefits of possible options.
24. Why it is important to present and agree the business case and marketing proposals with decision makers and how to do so.
25. Why it is important to gain commitment for the marketing plan through discussion and collaboration from relevant stakeholders and how to do.
26. How to establish monitoring procedures that are capable of generating evaluative information.
27. How to develop an implementation plan that specifies objectives, actions, responsibilities, budget, timescale and success criteria.
28. How to identify and obtain the human, physical and financial resources needed to implement the marketing plan.
29. When to brief personnel on their roles and responsibilities in accordance with the marketing plan and how to do so.
30. How to confirm the availability of agreed marketing resources with relevant internal and external stakeholders.
31. Why it is important to deliver the requirements of the plan within budget and timescale.
32. How to address risks, problems and variances from expectations in accordance with the marketing plan.
33. How to implement and monitor actions detailed in the marketing plan in a cost-efficient manner and according to schedule and contingencies.
34. Why it is important to keep stakeholders up to date with progress, developments and issues and how to do so.
35. Why it is important to share information with operational staff on marketing activities to maintain awareness of current organisational focus and how to do so.
36. How to record and report on the outcomes of the implementation in accordance with the marketing plan and organisational procedures.
37. Why it is important to establish an evaluation framework and how to do so.
38. How to evaluate and document marketing activities using agreed methods and benchmarks.
39. Why it is important to agree evaluation resources with stakeholders and how to do so.
40. Why it is important to gain stakeholders' agreement to the methods, tools and techniques that are most suited to carry out the evaluation.
41. Why it is important to use agreed methods to evaluate quantitative and qualitative data against agreed success criteria and how to do so.

42. Why it is important to evaluate the impact of the marketing plan against agreed criteria and how to do so.
43. How to evaluate the quality, cost-effectiveness and cost-efficiency of the marketing activity against the agreed criteria of the marketing plan.
44. How to identify and analyse the reasons for variances in performance from expectations.
45. What actions to recommend to address possible variances in accordance with the marketing plan.
46. What are the advantages and disadvantages of a range of evaluation methods
47. Why it is important to communicate and implement agreed changes.
48. How to report on the findings of the evaluation in the agreed format.
49. Why it is important to use evaluation results to inform future strategic planning and how to do so.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA34204**Implement and evaluate marketing campaigns and activities**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to implement and evaluate marketing campaigns or activities in line with an agreed strategy and marketing plan. It includes confirming the availability of resources and personnel, briefing those involved in their roles and responsibilities, developing and agreeing appropriate marketing materials, delivering the campaign or activity, addressing variances and recording and reporting on outcomes.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|---|--|
| 1. Implement marketing campaigns and activities | 1.1 Identify the current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to marketing . |
| | 1.2 Confirm the availability of necessary resources and personnel from relevant sources. |
| | 1.3 Brief personnel on their roles and responsibilities in line with the campaign or activity strategy and marketing plan. |
| | 1.4 Develop and agree appropriate marketing materials in line with the campaign or activity strategy and marketing plan. |
| | 1.5 Deliver the requirements of the campaign or activity strategy and marketing plan within budget and timescale. |
| | 1.6 Manage responses from customers in line with agreed organisational processes and procedures, where appropriate. |
| | 1.7 Monitor marketing activities against the agreed campaign or activity strategy and marketing plan and budget. |

- 1.8 Address variances in accordance with the campaign or activity strategy and **marketing** plan.
 - 1.9 Update key **stakeholders** with progress, developments and other issues on a regular basis as agreed.
 - 1.10 Record and report on the outcomes of the campaign or activities in line with organisational processes and procedures.
2. Evaluate the performance of marketing campaigns and activities
- 2.1 Determine the **indicators and metrics** against which the success of marketing activities can be evaluated.
 - 2.2 Agree specific, realistic and measurable targets and measures with key **stakeholders**.
 - 2.3 Establish an **evaluation framework** and agree it with key **stakeholders**.
 - 2.4 Agree the most appropriate evaluation methodology and associated resources with key **stakeholders**.
 - 2.5 Collect valid, reliable and comprehensive data, including feedback from key **stakeholders** according to organisational procedures.
 - 2.6 Use agreed methods to evaluate quantitative and qualitative data against agreed targets and measures.
 - 2.7 Identify and document the reasons for variances in performance against expectations.
 - 2.8 Assess the impact of **marketing** activities and outcomes against agreed targets and measures.
 - 2.9 Evaluate the quality, cost-effectiveness and cost-efficiency of the **marketing** activity against agreed targets and measures.

- 2.10 Report on the findings of the evaluation in the agreed format.
- 2.11 Take appropriate action based on the evaluation results.

RANGE STATEMENT

All range statements must be assessed:

1. Marketing:

- Advertising (Print, radio, website, etc.)
- Promotions/competitions
- Online campaigns

2. Stakeholders:

- Board of directors/ Owners
- Section heads (finance, marketing, customer service)
- Marketing team
- Internal customers

3. Indicators and metrics:

- Check for changes
- Changes in customer behaviour
- Evaluation framework

4. Evaluation framework:

- Monitor goals/strategy used
- Evaluate the ROI
- Conduct A/B Test for advertisements

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. Why it is important to identify the current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to marketing and how to do so.
2. How to confirm the availability of necessary resources and personnel.
3. Why it is important to brief personnel on their roles and responsibilities in line with the campaign or activity strategy and plan and how to do so.
4. How to develop and agree appropriate marketing materials in line with the campaign or activity strategy and plan.
5. Why it is important to deliver the requirements of the campaign or activity strategy and plan within budget and timescale and how to do so.
6. How to manage responses from customers in line with agreed organisational processes and procedures and when would this be appropriate.
7. How to monitor marketing activities against the agreed campaign or activity strategy and plan and budget.
8. What are the variances that should be addressed in accordance with the campaign or activity strategy and plan.
9. How to update key stakeholders with progress, developments and other issues on a regular basis.
10. How to record and report on the outcomes of the campaign or activities in line with organisational processes and procedures.
11. What are the indicators and metrics against which the success of marketing activities can be evaluated.
12. What are specific, realistic and measurable targets and measures.
13. How to agree specific, realistic and measurable targets and measures with key stakeholders.
14. Why it is important to establish an evaluation framework and agree it with key stakeholders and how to do so.
15. What are the appropriate evaluation methodologies and associated resources.
16. How to agree the most appropriate evaluation methodology and associated resources with key stakeholders.
17. How to collect valid, reliable and comprehensive data, including feedback from key stakeholders.
18. Why it is important to use agreed methods to evaluate quantitative and qualitative data against agreed targets and measures and how to do so.
19. Why it is important to identify and document the reasons for variances in performance against expectations and how to do so.

20. How to assess the impact of marketing activities and outcomes against agreed targets and measures.
21. How to evaluate the quality, cost-effectiveness and cost-efficiency of the marketing activity against agreed targets and measures.
22. How to report on the findings of the evaluation in the agreed format.
23. What is the appropriate action to take based on the evaluation results.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA32304

Develop and implement a customer insight strategy

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to identify information priorities in line with the marketing strategy, assess risks, resources, costs and benefits associated with accessing the information and feedback; establish how the information and feedback will be used, monitored and evaluated against agreed criteria to identify insights about the organisation's customers.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | | | |
|----|--------------------------------------|-----|---|
| 1. | Develop a customer insight strategy. | 1.1 | Determine the organisational requirements for customer information. |
| | | 1.2 | Identify and analyse the legal, regulatory and ethical requirements relating to the collection, storage and use of customer information. |
| | | 1.3 | Identify and clarify the uses of customer information to the organisation. |
| | | 1.4 | Identify and analyse the priorities in customer information to meet the needs of the organisation's marketing strategy and related performance targets. |
| | | 1.5 | Identify and analyse required feedback and the purpose(s) for which it is sought. |
| | | 1.6 | Identify and analyse the organisation's actual and target customer base from internal established data. |
| | | 1.7 | Identify and collaborate with stakeholders from whom feedback needs to be sought. |
| | | 1.8 | Assess information and identify further sources using new and existing data. |

- 1.9 Agree on how the information will be analysed and used to identify insights with relevant persons.
 - 1.10 Assess the **risks**, resources, costs and benefits associated with accessing customer information.
 - 1.11 Seek additional advice and guidance from recognised sources of expertise.
 - 1.12 Identify and analyse the components to be considered in developing a customer insight strategy.
 - 1.13 Consult on the insight strategy with key **stakeholders** and gain their commitment.
 - 1.14 Agree on the customer insight strategy with decision-makers.
2. Implement a customer insight strategy
- 2.1 Confirm that required customer information is in line with the customer insight strategy.
 - 2.2 Agree a plan to collect customer and industry information including timescales and budgets.
 - 2.3 Implement formal and informal processes to obtain the required feedback.
 - 2.4 Collect customer information in line with the agreed plan.
 - 2.5 Check the quality, validity and reliability of customer information and feedback against agreed criteria.
 - 2.6 Analyse and structure customer information in an appropriate format according to organisational procedures.
 - 2.7 Identify and analyse trends and patterns relevant to the agreed purposes and available data collected internally and externally.

- 2.8 Identify insights from customer information to inform marketing approaches.
- 2.9 Develop procedures for storage, use and updating of customer information in line with legal, regulatory and ethical requirements.
- 2.10 Inform colleagues and stakeholders ensuring agreed procedures for access and use are followed.
- 2.11 Check that confidential information and feedback are accessed securely according to organisational procedures.
- 3. Evaluate a customer insight strategy
 - 3.1 Agree the criteria required for evaluation of the insight strategy with relevant **stakeholders**.
 - 3.2 Establish when the insight strategy will be evaluated and the circumstances in which an unscheduled review will be conducted.
 - 3.3 Monitor continued compliance with **legal requirements**, codes of practice and organisational procedures.
 - 3.4 Collect valid and comprehensive data, including feedback from **stakeholders**.
 - 3.5 Evaluate information and feedback to assess any wider implications for the organisation.
 - 3.6 Evaluate the customer insight strategy against the agreed criteria.
 - 3.7 Share feedback with other business functions and key **stakeholders**, where appropriate.
 - 3.8 Identify and recommend timely actions in response to the feedback.
 - 3.9 Make recommendations to modify or maintain the customer insight strategy based on feedback obtained from **stakeholders**.

RANGE STATEMENT

All range statements must be assessed:

1. Legal requirements:

- Safety and health at work
- Employment legislation
- Copyright laws
- Equality
- Data protection
- Computer misuse

2. Regulatory requirements:

- Legal
- National standards
- Safety and health at work
- FTC guidelines/ standards

3. Ethical requirements:

- Moral (corporate social and environmental responsibility)
- Political (codes of practice)
- Material

4. Stakeholders:

- Internal customers (managers, colleagues)
- External customers (contractors, distributors, retailers)
- Investors
- Clients
- Shareholders

5. Risks:

- Market position
- Activities
- Future plans
- Economic downturn
- Data storage/risk of hackers

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. Why it is important to determine the organisational requirements for handling, obtaining, using, evaluating customer information and how to do so.
2. What are the legal, regulatory and ethical requirements relating to the collection, storage and use of customer information.
3. How to identify and clarify the uses of customer information to the organisation.
4. Why it is important to identify and analyse the priorities in customer information to meet the needs of the organisational marketing strategy and related performance targets and how to do so.
5. Why it is important to identify and analyse feedback that is required and the purpose(s) for which it is sought and how to do so.
6. How to identify and analyse the organisation's actual and target customer base.
7. Who are the stakeholders from whom feedback needs to be sought.
8. How to assess existing information and identify further sources.
9. How to establish how information will be analysed and used to identify insights.
10. What are the factors to consider when identifying and analysing priorities in customer information that will meet the needs of the organisation.
11. What are the risks, resources, costs and benefits associated with accessing the customer information and how to identify and assess them.
12. How to seek additional advice and guidance from recognised sources of expertise.
13. What are the components to be identified and analysed in developing a customer strategy and how to do so.
14. What are the available sources of expertise that can provide advice and guidance.
15. Why it is important to consult on the insight strategy with key stakeholders and gain their commitment and how to gain their commitment.
16. Why it is important to agree the customer insight strategy with decision-makers.
17. Why it is important to confirm that required customer information is in line with the customer insight strategy and how to do so.
18. What are the common data collection and reporting systems used in gathering customer information.
19. How to agree a plan to collect customer and industry information including timescales and budgets.
20. What are the necessary formal and informal processes to obtain the required feedback.
21. How to implement formal and informal processes to obtain the required feedback.

22. How to collect customer information in line with the agreed plan.
23. Why it is important to check the quality, validity and reliability of customer information and feedback and how to do so.
24. How to analyse and structure customer information in an appropriate format.
25. Why it is important to identify and analyse trends and patterns relevant to the agreed purpose(s) and how to do so.
26. How to identify and analyse insights from customer information to inform marketing approaches.
27. What are the procedures for the storage, use and updating of customer information in line with legal, regulatory and ethical requirements and how to do so.
28. What are the legal, regulatory and ethical requirements relating to the security of confidential data.
29. What are the methods of ensuring the security of confidential data.
30. Why it is important to inform colleagues and stakeholders of the agreed procedures for access and use of data and information.
31. How to select and apply appropriate data collection and analysis techniques.
32. How to evaluate quantitative and qualitative information against the agreed success criteria.
33. Why it is important to check that confidential information and feedback is accessed securely and how to do so.
34. How to establish the criteria required for evaluation of the insight strategy.
35. What are the circumstances in which an unscheduled review would be necessary
36. Why it is important to establish when the strategy will be evaluated and the circumstances in which an unscheduled review will be conducted and how to do so.
37. Why it is important to monitor continued compliance with legal requirements, codes of practice and organisational procedures and how to do so.
38. How to collect valid and comprehensive data, including feedback from customers and other stakeholders.
39. Why it is important to evaluate information and feedback to assess any wider implications for the organisation and how to do so.
40. How to evaluate the customer insight strategy against the agreed criteria.
41. Why it is important to share feedback with other business functions and key stakeholders, where appropriate.
42. Why it is important to identify and recommend timely actions in response to the feedback and how to do so.
43. How to make recommendations to modify or maintain the customer insight strategy.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA34404**Develop and manage brand identity and strategy**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to establish the rationale and target market for the brand; identify potentially competing brands, set out the characteristics that the brand is intended to communicate and select a name and/or design for the brand in line with its objectives and purpose.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | | | |
|-----|-----------------------------|-----|--|
| 1. | Establish the brand purpose | 1.1 | Establish and agree with key stakeholders the rationale for developing the brand. |
| | | 1.2 | Determine and agree with key stakeholders the objectives for establishing the brand . |
| | | 1.3 | Establish the target market for the brand according to the organisational requirements and marketing strategy. |
| | | 1.4 | Review and evaluate any existing brands in the market to identify potential competitor brands . |
| | | 1.5 | Interpret research to establish the meaning of the brand and its values and promise. |
| 2.1 | Establish brand identity | 2.1 | Confirm the aims, objectives and purpose of the brand with stakeholders. |
| | | 2.2 | Confirm the audience and target market for the brand based on established marketing data . |
| | | 2.3 | Set out the main characteristics that the brand is intended to communicate based on information collected. |
| | | 2.4 | Establish the benefits of the products or services to be associated with the brand based on the information gathered from stakeholders and other sources. |

- 2.5 Contribute to the selection of a name and/or design for the **brand** that communicates agreed characteristics, is appropriate for the target market and in line with the objectives and purpose of the brand.
 - 2.6 Confirm that the name and/or design does not infringe on existing **brands** and can be registered and protected, if required.
 - 2.7 Contribute to the development and publishing of **brand** guidelines following organisational procedures and **legal requirements**.
 - 2.8 Register, protect and defend the **brand** name or design, if necessary, following industry and **legal requirements**.
3. Influence customer perception
 - 3.1 Gather information on factors likely to affect customer perceptions of the proposed **brand**.
 - 3.2 Assess and analyse the validity and reliability of the information collected following organisational procedures and marketing objectives.
 - 3.3 Adjust the **brand image** based on feedback obtained from customers and key stakeholders.
 - 3.4 Promote communication of the **brand image** to customers to influence the buying process.
 - 3.5 Monitor and document the promotion of the **brand image** and identify strengths and weaknesses of the image.
 - 3.6 Adapt promotional activities in line with information gathered on the **brand image's** strengths and weaknesses.
 - 3.7 Manage and respond to negative feedback from customers following agreed criteria and organisational procedures.

4. Demonstrate brand identity
 - 4.1 Identify the actions required to demonstrate **brand** characteristics and present to key stakeholders.
 - 4.2 Develop a plan to promote the **brand** in line with the organisation's marketing strategy.
 - 4.3 Promote the trial **brand** to customers and other key stakeholders for feedback following the organisation's marketing strategy.
 - 4.4 Amend branding in light of feedback where appropriate.
 - 4.5 Project and monitor a consistent **brand image** according to the organisation's marketing strategy.
 - 4.6 Maintain the desired **brand** positioning to maximise return on investment according to organisational procedures.
 - 4.7 Protect the **brand**, ensuring that the **brand** guidelines and marketing strategy are followed.
 - 4.8 Monitor the success of the **brand** against agreed marketing criteria and organisational procedures.
 - 4.9 Check that the outcomes of **brand** monitoring inform future **brand** development.

5. Manage corporate reputation
 - 5.1 Promote awareness of the **brand**, communicating **brand** characteristics and values internally and externally.
 - 5.2 Confirm that staff understand **brand** characteristics and values and the importance of behaving in ways that are consistent with these.
 - 5.3 Assess and report on the risks to the **brand** and corporate reputation and how these will be mitigated.

- 5.4 Verify that business continuity plans take account of the need to manage the **brand** and protect the reputation of the organisation.
- 5.5 Track and gather valid and reliable information on perceptions of the current or proposed **brand** from customers and stakeholders.
- 5.6 Take appropriate action to manage feedback on the **brand** following marketing and organisational procedures.
- 5.7 Amend branding in light of feedback, where appropriate, following the organisational marketing strategy procedures.

RANGE STATEMENT

All range statements must be assessed:

1. Key stakeholders:

- Internal customers (managers, colleagues)
- External customers (contractors, distributors, retailers)
- Investors
- Clients
- Shareholders

2. Brand:

- Product
- Company
- Supplier
- Company voice/tone (full corporate, light, relatable)
- Potential customer (likes, dislikes, buying behaviour)
- Registered trademarks and brands
- Branding guidelines
- Intellectual property

3. Brand image:

- Target audience
- Critical business goals
- Brand persona (image, brand overview, traits, style guide)
- Key message

4. Research:

- Quantitative
- Qualitative

5. Legal requirements:

- Safety and health at work
- Employment legislation
- Copyright laws
- Equality
- Data protection

6. Marketing data:

- Consumer data (customer contact details, history of shopping or purchasing, demographics, history of past communication)
- Business data (Business-to-Business (B2B), Business-to-Customer (B2C))

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. Why it is important to establish and agree with key stakeholders the rationale for developing the brand and how to do so.
2. Why it is important to determine and agree with key stakeholders the objectives for establishing the brand and how to do so.
3. How to establish the target market for the brand according to organisational requirements and marketing strategy.
4. Why it is important to review any existing brands in the market to identify potential competitor brands and how to do so.
5. How to interpret research to establish the meaning of the brand and its values and promise.
6. How to confirm the aims, objectives and purpose of the brand with stakeholders.
7. How to confirm the audience and target market for the brand based on established marketing data.
8. Why it is important to set out the main characteristics that the brand is intended to communicate based on information collected.
9. What are the main characteristics that the brand is intended to communicate.
10. Why is it important to establish the benefits of the products and/or services to be associated with the brand based on information gathered and other sources and how to do so.
11. How to contribute to the selection of a name and/or design for the brand that communicates the agreed characteristics, is appropriate for the target market and in line with the objectives and purpose of the brand.
12. Why it is important to ensure that the name and/or design does not infringe existing brands and can be registered and protected, if required.
13. How to contribute to the development and publishing of brand guidelines.
14. Why it is important to register, protect and defend the brand name and/or design following industry and legal requirements and how to do so.
15. Why it is important to gather information on factors likely to affect customer perceptions of the proposed brand and how to do so.
16. How to assess and analyse the validity and reliability of information collected following agreed organisational procedures and marketing objectives.
17. How to adjust the brand image based on feedback from customers and key stakeholders.
18. How to promote the communication of the brand image to customers.
19. Why it is important to monitor and document the promotion of the brand image and identify strengths and weaknesses of the image and how to do so.
20. How to adapt promotional activities in line with the brand image's strengths and weaknesses.

21. Why it is important to manage and respond to negative feedback from customers and how to do so.
22. What are brand characteristics.
23. How to identify the actions required to demonstrate the brand characteristics and when to do so.
24. How to present brand characteristics to key stakeholders.
25. How to develop a plan to promote the brand in line with the organisation's marketing strategy.
26. How to promote the trial brand to customers and other key stakeholders for feedback following the organisation's marketing strategy.
27. How to amend branding in light of feedback, where appropriate.
28. Why it is important to project and monitor a consistent brand image according to the organisation's marketing strategy and how to do so.
29. What is brand positioning and return on investment.
30. How to maintain the desired brand positioning to maximise return on investment according to organisational procedures.
31. How to protect the brand, ensuring that brand guidelines and marketing strategy are followed.
32. How to monitor the success of the brand against agreed marketing criteria and organisational procedures.
33. Why it is important to ensure that the outcomes of brand monitoring inform future brand development.
34. How to promote awareness of the brand, communicating brand characteristics and values internally and externally.
35. Why it is important to ensure that staff understand brand characteristics and values and the importance of behaving in ways that are consistent with these and how to do so.
36. How to assess and report on the risks to the brand and corporate reputation and how these will be mitigated.
37. Why it is important to verify that business continuity plans take account of the need to manage the brand and protect the reputation of the organisation.
38. Why it is important to track and gather valid and reliable information on perceptions of the current or proposed brand from customers and stakeholders and how to do so.
39. What is the appropriate action to take to manage feedback on the brand and when to do so.
40. How to amend branding in light of feedback, where appropriate.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA34504**Contribute to the development of new products, services and pricing policy**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to develop and price new products or services. It includes agreeing a strategy and pricing policy in line with the organisation's overall marketing strategy and objectives; generating and testing ideas for new products or services, developing business cases for new products or services, monitoring the effectiveness of the pricing policy and making justified recommendations for change in price.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|--|--|
| 1. Assess marketing opportunities for new products and/or services | <ul style="list-style-type: none"> 1.1 Identify and analyse opportunities for new products and services against agreed criteria and the strategic plan, using tools that are appropriate for the task. 1.2 Identify and adhere to the legal, regulatory and ethical requirements that relate to the development of new products, services and pricing policy. 1.3 Establish target customers' perceptions and likely uses of the product or service based on information gathered. 1.4 Assess and document the likely impact of customers' culture and behaviours on potential sales based on information and data gathered. 1.5 Identify the nature of potential threats posed by competitors and formulate an appropriate plan to address them. 1.6 Identify and document the political, economic, social, technological and legal factors to be taken into account when assessing marketing opportunities for new products or services. 1.7 Identify and document the market and profit potential of the new product or service according to the marketing mix. |
|--|--|

2. Develop new products and/or services
 - 2.1 Generate ideas for new products or services and identify those that have the most potential to meet customer needs and business needs.
 - 2.2 Use information and data gathered from a **marketing mix** analysis to justify the recommendation to develop new products or services.
 - 2.3 Agree a new product or service strategy that is in line with the overall marketing strategy and objectives.
 - 2.4 Specify how proposed products or services align with the marketing strategy.
 - 2.5 Propose and develop market test plans for products or services that contain specified actions, timescales, resource requirements and evaluation criteria.
 - 2.6 Test ideas for new products or services in line with the market test plan.
 - 2.7 Prepare a **business case**, including a **risk assessment**, justifying recommendations for the development of the new product or service.
 - 2.8 Consult with relevant **key stakeholders** on the **business case** and take account of feedback.
 - 2.9 Present the **business case** to decision makers following organisational procedures.
3. Develop and implement a pricing policy for new products and/or services
 - 3.1 Identify and adhere to **legal, regulatory, ethical** and organisational requirements that may impact the pricing of an organisation's products or services.
 - 3.2 Determine a **pricing policy** for products or services in line with the overall marketing strategy and objectives.

- 3.3. Confirm that the **pricing policy** takes account of all relevant internal and external factors.
- 3.4. Agree the **pricing policy** with **key stakeholders** and accord to the marketing strategy and objectives.
- 3.5. Monitor and evaluate the effectiveness of the **pricing policy** against agreed criteria of the marketing strategy.
- 3.6. Assess and document the potential impact of pricing changes on **key stakeholders** and the organisation.
- 3.7. Propose changes to the **pricing policy**, making justified recommendations for the increase or decrease in price.

RANGE STATEMENT

All range statements must be assessed:

1. Tools:

- Direct mail (flyers, letters)
- Person to person
- Focus groups/stakeholder meeting
- A/B testing
- Surveys
- Telephone
- Internet
- Social media

2. Legal:

- Safety and health at work
- Employment legislation
- Copyright laws
- Equality
- Data Protection

3. Regulatory:

- Legal
- National standards
- Safety and health at work

4. Ethical:

- Moral (Corporate social and environmental responsibility)
- Political (Codes of practice)
- Material

5. Marketing mix:

- Price
- Product
- Place
- Promotion
- People
- Process
- Physical environment

6. Business case:

- Formal
- Informal

7. Risk assessment:

- Brand
- Product development
- Demand
- Concentration
- Price
- Distribution
- Operations
- Reputation
- Sales

8. Key stakeholders:

- Internal customers (managers, colleagues)
- External customers (contractors, distributors, retailers)
- Investors
- Clients
- Shareholders

9. Pricing policy:

- Cost-orientated method (cost plus pricing, mark up pricing, break-even pricing, target return pricing, early cash recovery pricing)
- Market-orientated methods (perceived value pricing, going rate pricing, discount pricing, sealed-bid pricing, differentiated pricing)

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. Why it is important to identify and analyse opportunities for new products and services against agreed criteria and the strategic plan, using tools that are appropriate for the task and how to do so.
2. Why it is important to identify and adhere to legal, regulatory and ethical requirements that relate to the development of new products, services and pricing policy and how to do so.
3. What are the sources of ideas for potential new products or services.
4. How to establish target customers' perceptions and likely uses of the product or service based on information gathered.
5. What are the methods for identifying customer behaviour and customer business needs.
6. Why it is important to assess and document the likely impact of customers' culture and behaviours on potential sales based on information and data gathered and how to do so.
7. Why it is important to identify the nature of potential threats posed by competitors and formulate an appropriate plan to address them and how to do so.
8. What are the implications of competitor activity on the development of proposed new products or services.
9. Why it is important to identify and document the political, economic, social, technological and legal factors to be taken into account when assessing marketing opportunities for new products or services and how to do so.
10. What are the components of a marketing mix and why they are important.
11. Why it is important to identify and document the market and profit potential of the new product or service according to the marketing mix and how to do so.
12. What are the range of tools to identify marketing opportunities and threats, advantages and disadvantages.
13. How to generate ideas for new products or services and identify those that have the most potential to meet customer needs and business needs.
14. Why it is important to use information and data gathered from a marketing mix analysis to justify recommendations to develop new products or services and how to do so.
15. Why it is important to agree a new product or service strategy that is in line with the overall marketing strategy and objectives and how to do so.
16. Why it is important to specify how the proposed products or services align with the marketing strategy.
17. How to propose market test plans for products or services that contain specified actions, timescales, resource requirements and evaluation criteria.
18. When to test ideas for new products or services in line with the test plan and how to do so.

19. What are the advantages and disadvantages of different forms of market testing.
20. How to distinguish between product ideas, concepts and image and the stages of development.
21. What are the sources for generating ideas for new products or services.
22. How the power of a brand influences demand for new products or services.
23. Why it is important to prepare a business case, including a risk assessment, justifying recommendations for the development of the new product or service and how to do so.
24. When to consult with key stakeholders on the business case and take account of feedback and how to do so.
25. How to present the business case to decision makers following organisational procedures.
26. What are the legal, regulatory, ethical and organisational requirements that may impact the pricing of an organisation's products or services.
27. What are the principal types of pricing policy and their strengths and weaknesses.
28. How to determine a pricing policy for products or services in line with the overall marketing strategy and objectives.
29. What are the internal and external factors that need to be taken into account when developing pricing policies.
30. What are the types of costs involved and how these can impact on pricing policy.
31. Why it is important to agree the pricing policy with key stakeholders and how to do so.
32. What are the types of methods used to monitor and evaluate the effectiveness of the pricing policy against agreed criteria and how to do so.
33. How to assess and document the potential impact of pricing changes on key stakeholders and the organisation.
34. How to propose changes to the pricing policy to stakeholders, making justified recommendations for the increase or decrease in price.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA34604**Coordinate production of brochures and marketing materials**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to coordinate the development process for brochures and other marketing materials from a content and production perspective.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|---|---|
| 1. Plan the production of brochures and marketing materials | 1.1 Identify the legal, regulatory and ethical requirements relating to the organisation's production of brochures and marketing materials .

1.2 Plan the production of brochures and marketing materials according to marketing plan objectives.

1.3 Evaluate and document factors that impact the nature of materials and the development process, including sustainability considerations based on the marketing plan objectives.

1.4 Create production plans, including timelines, responsibilities, budget and contingency measures following the marketing plan objectives. |
| 2. Produce information for inclusion | 2.1 Produce or obtain accurate and complete information for inclusion in brochures or materials as outlined in the marketing plan.

2.2 Present information that promotes the business in a clear format and a culturally appropriate way following organisational policy and guidelines. |
| 3. Obtain quotations for artwork and printing | 3.1 Develop and provide accurate and complete specifications to quoting organisations within appropriate timeframes following organisational procedures. |

- 3.2 Obtain quotations with details of potential variations to cost and conditions that may apply following organisational procedures.
- 4. Develop a final copy for brochures and marketing materials
 - 4.1 Develop a copy using basic creative writing techniques or obtain from a relevant source following organisational procedures and marketing plan.
 - 4.2 Integrate accurate, practical and operational details within the final copy following the development process and marketing plan.
 - 4.3 Present accurate information about costs and conditions to relevant **stakeholders** following organisational procedures.
 - 4.4 Check the final copy for accuracy prior to submission for production following organisational procedures and the marketing plan.
- 5. Coordinate the production of brochures and marketing materials
 - 5.1 Liaise with production personnel and monitor the schedule of the production following organisational procedures.
 - 5.2 Check and correct production work as required following organisational procedures and work plan.
 - 5.3 Approve artwork according to organisational procedures.
 - 5.4 Obtain and deliver materials on schedule or action contingency measures in accordance with organisational procedures.

RANGE STATEMENT

All range statements must be assessed:

1. Legal and regulatory:

- Safety and health at work
- Employment legislation
- Copyright laws
- Equality
- Data protection
- Computer misuse
- National standards
- FTC guidelines and standards

2. Ethical:

- Moral (corporate social and environmental responsibility)
- Political (codes of practice)
- Materials

3. Marketing materials:

- Advertising material
- Display material
- Product brochure
- Promotional material

4. Factors:

- Accessibility
- Availability
- Design (style, size)
- Risks (economic, social, technological, environmental)
- Formats
- Mobile

5. Stakeholders:

- Internal customers (managers, colleagues)
- External customers (contractors, distributors, retailers)
- Investors
- Clients
- Shareholders

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. Why it is important to identify the legal, regulatory and ethical requirements relating to the organisation's production of brochures and marketing materials and how to do so.
2. What are the legal and regulatory requirements relating to the production of brochures and marketing materials.
3. What are the risks related to the production of brochures and marketing materials.
4. How to plan the production of brochures and marketing materials according to marketing plan objectives.
5. Why it is important to evaluate factors that impact on the nature of materials and the development process, including sustainability considerations based on the marketing plan objectives and how to do so.
6. Why it is important to mitigate data hacks and how to do so.
7. Why it is important to create production plans, including timelines, responsibilities, budget and contingency measures following the marketing plan objectives and how to do so.
8. Why it is important to produce or obtain accurate and complete information for inclusion in the brochures or materials as outlined in the marketing plan and how to do so.
9. Why it is important to present information that promotes the business in a clear format and a culturally appropriate way following organisational policies and guidelines and how to do so.
10. Why it is important to design brochures to suit the platform or media where they will be distributed and how to do so.
11. How to develop and provide accurate and complete specifications to quoting organisations within appropriate timeframes following organisational procedures.
12. How to obtain quotations with details of potential variations to cost and conditions that may apply following organisational procedures.
13. How to develop a copy using basic creative writing techniques or obtain copy from relevant sources following organisational procedures and the marketing plan.
14. How to integrate accurate, practical and operational details following the development process and marketing plan.
15. How to present accurate information about costs and conditions to relevant stakeholders following organisational procedures.
16. Why it is important to check the copy for accuracy prior to submission for production following organisational procedures and the marketing plan and how to do so.
17. Why it is important to liaise with production personnel and monitor the schedule of production following organisational procedures.
18. How to check and correct production work as required following organisational procedures and the work plan objectives.
19. How to approve artwork according to organisational procedures.

20. How to obtain and deliver materials on schedule or action contingency measures in accordance with organisational procedures.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA34704**Establish and adjust the marketing mix**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to analyse the inter-related marketing components, through determination of the optimum marketing mix for a business.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | | | |
|----|---|-----|---|
| 1. | Evaluate the significance of each component of the marketing mix and their inter-relationship | 1.1 | Identify and document the key characteristics of products and services and their significance to the market estimate according to the marketing plan objectives. |
| | | 1.2 | Review and analyse the pricing policy and pricing variables to determine their effect on demand based on the marketing plan objectives. |
| | | 1.3 | Analyse promotional methods to determine their importance to marketing outcomes detailed in the marketing plan objectives. |
| | | 1.4 | Review and document channels of distribution and their significance to estimated marketing outcomes and objectives. |
| | | 1.5 | Identify and analyse the level of customer service provision to determine the significance to marketing outcomes and objectives. |
| | | 1.6 | Identify and document the potential customer base and key pressure points for success based on the marketing plan objectives. |
| | | 1.7 | Analyse the effect of the components of the marketing mix on each other and establish their relative importance to the customer base. |
| | | 1.8 | Evaluate customer satisfaction following the marketing plan objectives and indicators. |

2. Determine the marketing mix for specific markets
 - 2.1 Identify and assess **environmental factors** for their impact on the **marketing mix** according to marketing objectives.
 - 2.2 Identify and document consumer priorities that affect the **marketing mix** according to the marketing objectives.
 - 2.3 Identify and evaluate product, pricing, promotional, distribution and service variations against marketing plan objectives and target market characteristics.
 - 2.4 Develop and select a **marketing mix** that best satisfies the target market and meets the marketing plan objectives.
 - 2.5 Complete and report on the **marketing mix**, organisational, strategic and operational marketing plan objectives to senior management.
3. Monitor and adjust the marketing mix
 - 3.1 Evaluate and document the **marketing mix** against the marketing plan performance and components isolated for testing.
 - 3.2 Evaluate and report on the implications of altering one or more components of the **marketing mix** in relation to market factors and consumer response.
 - 3.3 Adjust the components of the **marketing mix** in the light of test results and the evaluation of market response.
 - 3.4 Adjust the **marketing mix** to ensure it meets budgetary requirements of the marketing plan.

RANGE STATEMENT

All range statements must be assessed:

1. Characteristics of products and services:

- Brand and brand loyalty
- Compatibility with other products and services
- Durability
- Features and design
- Functional performance
- Innovation
- Packaging
- Pollution and hazard reduction
- Quality
- Technical features
- Available volumes
- Styling

2. Pricing variables:

- Credit terms
- Discount percentages and structure
- Financial deals
- Leasing arrangements
- Price point
- Residual value
- Sales (end of season etc.), special offers

3. Promotional methods:

- Internal customers (managers, colleagues)
- External customers (contractors, distributors, retailers)
- Investors
- Clients
- Shareholders
- Stakeholders (in store promotions, flyers, campaigns)

4. Channels of distribution:

- Wholesale
- E-business
- Retail
- Distributor
- Delivery service
- Mail order
- Franchisee

5. Level of customer service:

- No customer service
- One-on-one personal service
- After sales service
- Call centre support
- Electronic client service
- Warranty/ guarantee
- Customer satisfaction survey

6. Marketing mix:

- Product and service
- Pricing
- Promotional
- People
- Process
- Place
- Physical

7. Environmental factors:

- Internal (employees, customers, shareholders, retailers, distributors)
- External (political, economic, social, technological, legal)

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. What are the key characteristics of products or services.
2. Why it is important to identify and document the key characteristics of products or services and their significance to the estimated market according to the marketing plan objectives and how to do so.
3. What are pricing variables.
4. Why it is important to review and analyse the pricing policy and pricing variables to determine their effect on demand based on the marketing plan objectives and how to do so.
5. Why it is important to analyse promotional methods to determine their importance to the marketing outcomes detailed in the marketing plan objectives and how to do so.
6. Why it is important to review and document the channels of distribution and their significance to estimated marketing outcomes and objectives and how to do so.
7. Why it is important to identify and analyse the level of customer service provision to determine its significance to marketing outcomes and objectives and how to do so.
8. Why it is important to identify and document the potential customer base and key pressure points for success based on the marketing plan objectives and how to do so.
9. What are the components of the marketing mix.
10. Why it is important to analyse the effect of the components of the marketing mix on each other and establish their relative importance to the customer base and how to do so.
11. Why it is important to evaluate customer satisfaction following the marketing plan objectives and indicators and how to do so.
12. What are the environmental factors that impact the marketing mix.
13. Why it is important to identify and assess the environmental factors for their impact on the marketing mix according to the marketing objectives and how to do so.
14. Why it is important to identify and document consumer priorities that affect the marketing mix according to the marketing objectives and how to do so.
15. Why it is important to identify and evaluate product, pricing, promotional, distribution and service variations against marketing plan objectives and target market characteristics and how to do so.
16. How to develop and select a marketing mix that best satisfies the target market and meets the marketing plan objectives.
17. How to complete and report on the marketing mix, organisational, strategic and operational marketing plan objectives to senior management.
18. How to evaluate and document the marketing mix against the marketing plan performance and components isolated for testing.
19. Why it is important to evaluate and report on the implications of altering one or more components of the marketing mix in relation to market factors and consumer response and how to do so.

20. How to adjust the components of the marketing mix in the light of test results and the evaluation of market response.
21. How to adjust the marketing mix to ensure it meets the budgetary requirements of the marketing plan.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA34804

Forecast and review marketing performance

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to forecast and determine the indicators and metrics against which the success of marketing activities will be measured and agreeing the key points at which marketing activity should be monitored.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | | | |
|----|--------------------------------|-----|--|
| 1. | Forecast marketing performance | 1.1 | Confirm the core activities, customer base, business values and current business direction of the organisation with relevant key stakeholders . |
| | | 1.2 | Identify and analyse the current marketing performance of the organisation and the effectiveness of past marketing or positioning. |
| | | 1.3 | Determine and forecast the indicators and metrics against which the success of organisational marketing activities can be measured. |
| | | 1.4 | Agree the selected indicators, metrics and forecast with key internal and external stakeholders. |
| | | 1.5 | Assess and document the likely impact of external factors on marketing performance to the organisation. |
| | | 1.6 | Confirm that the selected indicators and metrics are appropriate to the specific organisational marketing outcomes to be monitored. |
| | | 1.7 | Determine and agree timescales and key points at which organisational marketing activity should be monitored. |
| | | 1.8 | Collect valid, reliable and comprehensive performance data, including feedback from key stakeholders following organisational procedures. |

- 1.9 Identify and analyse the **legal, regulatory** and **ethical** constraints of the market for their effect on the business.
2. Review marketing performance
 - 2.1 Review performance data from all areas of the organisation using agreed **indicators and metrics** to identify strengths, weaknesses and critical success factors.
 - 2.2 Identify and evaluate the current capabilities and resources of the organisation to identify areas for improvement or exploitation.
 - 2.3 Identify and report on under-performing products or services of the organisation for redevelopment or withdrawal following organisational marketing strategy and objectives.
 - 2.4 Analyse reasons for any variations in business and marketing performance and take appropriate action to address them, following organisational procedures.
 - 2.5 Confirm the strength and current competitive position of the organisation to inform future work and inform relevant **key stakeholders**.

RANGE STATEMENT

All range statements must be assessed:

1. Key stakeholders:

- Internal customers (managers, colleagues)
- External customers (contractors, distributors, retailers)
- Investors
- Clients
- Shareholders

2. Forecast:

- Qualitative (Delphi method, panel discussions, market research, sales force estimates, consumer surveys, historic comparison)
- Quantitative (trend projection, time series, causal model)

3. Indicators and metrics:

- Performance indicators
- Cost per Lead (CPL)
- Marketing qualified leads (MQL)
- Cost per customer acquisition
- Customer retention
- Marketing ROI
- Sales qualified leads (SQL)
- Opportunity-to-win ratio
- Sales revenue
- Customer lifetime value
- Social media traffic

4. Legal:

- Safety and health at work
- Employment legislation
- Copyright laws
- Equality
- Data Protection

5. Regulatory:

- Legal
- National Standards
- Safety and Health at Work Act

6. Ethical:

- Moral (corporate social and environmental responsibility)
- Political (codes of practice)
- Material

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. Why it is important to confirm the core activities, customer base, business values and current business direction of the organisation and how to do so.
2. Why it is important to identify and report on current marketing performance and the effectiveness of past marketing or positioning and how to do so.
3. Why it is important to determine and forecast the indicators and metrics against which the success of marketing activities can be measured and how to do so.
4. Why it is important to agree the indicators, metrics and forecast with key stakeholders and how to do so.
5. Why it is important to evaluate the likely impact of external factors on marketing performance and when to do so.
6. Why it is important to confirm that the selected indicators and metrics are appropriate to the specific organisational marketing outcomes to be monitored and how to do so.
7. How to determine and agree timescales and key points at which marketing activity should be monitored and when to do so.
8. How to collect valid, reliable and comprehensive performance data, including feedback from key internal and external stakeholders, following organisational procedures.
9. Why it is important to review performance data from all areas of the organisation using agreed indicators and metrics to identify strengths, weaknesses and critical success factors and how to do so.
10. Why it is important to identify and evaluate the current capabilities and resources of the organisation to identify areas for improvement or exploitation and how to do so.
11. Why it is important to identify under-performing products or services of the organisation for re-development or withdrawal and how to do so.
12. Why it is important to analyse reasons for any variations in performance and take appropriate action to address them following organisational procedures and how to do so.
13. Why it is important to confirm the strength and current competitive position of the organisation to inform future work and how to do so.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA34904**Evaluate the performance of marketing activities**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to establish and agree on an evaluation framework, methodology and resources, collecting valid, reliable and comprehensive data and evaluating qualitative and quantitative data.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | | | |
|----|---------------------|-----|--|
| 1. | Evaluate the market | 1.1 | Select and agree with key stakeholders , the key performance indicators and marketing metrics against which the success of marketing activities can be evaluated. |
| | | 1.2 | Agree and document specific, realistic and measurable targets and measures with key stakeholders in accordance with the marketing plan objectives. |
| | | 1.3 | Establish and design an evaluation framework and agree it with key stakeholders in accordance with the marketing and marketing communication plan. |
| | | 1.4 | Agree and develop the most appropriate evaluation methodology and associated resources with key stakeholders in accordance with the marketing plan and organisational requirements. |
| | | 1.5 | Collect and document valid, reliable and comprehensive data, including feedback from key stakeholders in accordance with the marketing plan objectives. |
| | | 1.6 | Use agreed methods to evaluate quantitative and qualitative data against agreed targets and measures in accordance with the marketing plan and organisation's requirements. |

- 1.7 Identify and document the reasons for variances in performance against expectations and the marketing plan objectives.
 - 1.8 Assess and document the impact of marketing activities and outcomes against agreed targets and measures of the marketing plan.
 - 1.9 Evaluate and document the quality, cost-effectiveness and cost-efficiency of the marketing activity against the agreed targets and measures of the marketing plan.
2. Monitor and improve marketing performance
- 2.1 Monitor and document progressive performance against the marketing plan objectives, **key performance indicators** and **marketing metrics**.
 - 2.2 Monitor and document revenue and costs against budget analysed variations in accordance with the marketing plan and organisational requirements.
 - 2.3 Identify and document improvements through consultation with staff and customers in accordance with organisation's strategic plan and marketing plan.
 - 2.4 Analyse and document changes in the market and their impact on organisational practices in accordance with the marketing plan.
 - 2.5 Identify and communicate proposed changes and revised targets to **key stakeholders** to facilitate implementation.
 - 2.6 Report on the findings of the final evaluation in the agreed format and in accordance with organisational procedures and the marketing plan objectives.

RANGE STATEMENT

All range statements must be assessed:

1. Key stakeholders:

- Internal customers (managers, colleagues, etc.)
- External customers (contractors, distributors, retailers, etc.)
- Clients

2. Key performance indicators:

- Sales revenue
- Cost per lead
- Customer lifetime value
- Inbound marketing ROI
- Traffic to lead ratio (new contract rate)
- Lead to customer ratio
- Landing page conversion rates
- Organic website traffic
- Social media (metrics to be included, e.g. engagement, leads)
- Mobile traffic, leads and conversion rates
- Impressions and engagements
- Marketing metrics

3. Marketing metrics:

- Digital marketing metrics
- Social media metrics
- Email marketing metrics

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. What are key performance indicators and marketing metrics.
2. Why it is important to select and agree with key stakeholders, the key performance indicators and marketing metrics against which the success of marketing activities can be evaluated.
3. How to agree and document specific, realistic and measurable targets and measures with key stakeholders in accordance with the marketing plan objectives.
4. What is an evaluation framework.
5. Why it is important to establish and design an evaluation framework and agree it with key stakeholders in accordance with the marketing plan and marketing communication plan and how to do so.
6. How to agree and develop the most appropriate evaluation methodology and associated resources with key stakeholders in accordance with the marketing plan and organisational requirements.
7. How to collect and document valid, reliable and comprehensive data, including feedback from key stakeholders in accordance with the marketing plan objectives.
8. What are the methods to use to evaluate quantitative and qualitative data.
9. Why it is important to use agreed methods to evaluate quantitative and qualitative data against agreed targets and measures in accordance with the marketing plan and organisation's requirements and how to do so.
10. How to identify and document the reasons for variances in performance against expectations and the marketing plan objectives.
11. How to assess and document the impact of marketing activities and outcomes against the agreed targets and measures of the marketing plan.
12. How to evaluate and document the quality, cost-effectiveness and cost-efficiency of the marketing activity against the agreed targets and measures of the marketing plan.
13. Why it is important to monitor and document progressive performance against the marketing plan objectives, key performance indicators and marketing metrics and how to do so.
14. How to monitor and document revenue and costs against budget, variations analysed in accordance with the marketing plan and organisational requirements.
15. How to identify and document improvements through consultation with staff and customers in accordance with the organisation's strategic and marketing plans.
16. How to analyse and document changes in the market and their impact on the organisation's practices in accordance with the marketing plan.
17. How to identify and communicate proposed changes and revised targets to key stakeholders to facilitate their implementation.

18. How to report on the findings of the final evaluation in the agreed format in accordance with organisational procedures and the marketing plan objectives.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

Assessment methods

The methods which can be used to determine competence in performance and underpinning knowledge.

Assessors

The Assessor guides and assesses the candidate. His/her role is to determine whether evidence presented by a candidate for assessment within the programme, meets the required standard of competence in the relevant unit or element. The Assessor needs to be competent to assess to national standards in the area under assessment.

Approved Centre

Organisation/Centre approved by the TVET Council to offer full National Vocational Qualifications.

Case Studies

In situations where it is difficult for workplace assessment to take place, case studies can offer the candidate an opportunity to demonstrate potential competence.

A case study is a description of an actual or imaginary situation presented in some detail. The way the case study is presented will vary depending upon the qualification, but the most usual methods are written, taped or filmed.

The main advantage of a case study is the amount of evidence of underpinning knowledge they can generate and the specific nature of the evidence produced.

Competence

In the context of vocational qualifications, competence means: the ability to carry out prescribed activities to nationally pre-determined standards in an occupation. The definition embraces cognitive, practical and behavioural skills, underpinning knowledge and understanding and the ability to react appropriately in contingency situations.

Element

An element is a description of an activity which a person should be able to do. It is a description of an action, behaviour or outcome which a person should be able to demonstrate.

Explanation of NVQ Levels

NVQs cover five (5) levels of competence, from entry level staff at Level 1 through to senior management at Level 5.

Level 1 - Entry Level

Recognises competence in a range of varied work activities performed in a variety of contexts. Most work activities are simple and routine. Collaboration with others through work groups or teams may often be a requirement. Substantial supervision is required especially during the early months evolving into more autonomy with time.

Level 2 - Skilled Occupations

Recognises competence in a broad range of diverse work activities performed in a variety of contexts. Some of these may be complex and non-routine and involve some responsibility and autonomy. Collaboration with others through work groups or teams and guidance of others may be required.

Level 3 - Technician and Supervisory Occupations

Recognises competence in a broad range of complex, technical or professional work activities performed in a wide variety of contexts, with a substantial degree of personal responsibility and autonomy. Responsibility for the work of others and the allocation of resources are often a requirement. The individual is capable of self-directed application, exhibits problem solving, planning, designing and supervisory capabilities.

Level 4 - Technical Specialist and Middle Management Occupations

Recognises competence involving the application of a range of fundamental principles and complex techniques across a wide and unpredictable variety of contexts. Requires very substantial personal autonomy and often significant responsibility for the work of others, the allocation of resources, as well as personal accountability for analysis, diagnosis, design, planning, execution and evaluation.

Level 5 - Chartered, Professional and Senior Management Occupations

Recognises the ability to exercise personal professional responsibility for the design, development or improvement of a product, process, system or service. Recognises technical and management competencies at the highest level and includes those who have occupied positions of the highest responsibility and made outstanding contribution to the promotion and practice of their occupation.

External Verifier

The External Verifier is trained and appointed by the TVET Council and is competent to approve and ensure an approved Centre's quality of provision.

Internal Verifier

The Internal Verifier acts in a supporting role for Assessors to ensure consistent quality of assessment and competence. They need to be competent to assess to national standards in the area under assessment.

NVQ

National Vocational Qualifications (NVQs) are work-based qualifications that assess an individual's competence in a work situation and certify that the individual can perform the work role to the standards expected in employment.

NVQs are based on national occupational standards of competence drawn up by standards-setting bodies known as Industry Lead Bodies. The standards describe the level and breadth of performance that is expected of persons working in the industry or sector which the NVQ covers.

NVQ Coordinator

The NVQ Coordinator is the Centre contact within each approved Centre offering NVQs. He/she has overall responsibility for the operation and administration of the NVQ system

Observation

Observation of the candidate carrying out his/her job in the workplace is the assessment method recommended in the vast majority of units and elements. Observation of staff carrying out their duties is something that most supervisors and managers do every day.

Performance Criteria

Performance criteria indicate what is required for the successful achievement of an element. They are descriptions of what is expected in competent performance.

Product of Work

This could be items produced during the normal course of work, which can be used for evidence purposes such as reports, menus, promotional literature, training plans, etc.

Questioning

Questioning is one of the most appropriate ways to collect evidence to assess a candidate's underpinning knowledge and understanding.

Questioning can also be used to assess a candidate in those areas of work listed in the range which cannot be assessed by observation. Guidance on when this assessment method can be used is given in the assessment guidance of each individual element.

As an assessment method, questioning ensures you have all of the evidence about a candidate's performance. It also allows you to clarify situations.

Range statements

The range puts the element of competence into context. A range statement is a description of the range of situations to which an element and its performance criteria is intended to apply.

Range statements are prescriptive therefore each category must be assessed.

Role-plays

Role-plays are simulations where the candidate is asked to act out a situation in the way he/she considers “real” people would behave. By using role-play situations to assess a candidate you are able to collect evidence and make a judgment about how the candidate is most likely to perform. This may be necessary if the range specified includes a situation in which the candidate is unlikely to find himself/herself in the normal course of their work, or where the candidate needs to develop competence, before being judged competent for example, in a disciplinary situation. .

Simulations

Where possible, assessment should always be carried out by observing **natural performance** in the workplace. **Simulated performance**, however, can be used where specified to collect evidence about an aspect of the candidate’s work which occurs infrequently or is potentially hazardous; for example, dealing with fires.

By designing the simulated situation, briefing the candidate and observing his/her performance, you will be able to elicit evidence which will help you judge how a candidate is **most likely** to perform in real life.

Supplementary evidence

Supplementary evidence can be used to confirm and support performance evidence. Types of supplementary evidence include witness testimonies, reports, journals or diaries, records of activities, personal statements, simulation (see note in glossary).

Underpinning knowledge

Underpinning knowledge indicates what knowledge is essential for a person to possess in order to successfully achieve an element and prove total competence.

Units

A unit of competence describes one or more activities which form a significant part of an individual’s work. Units are accredited separately but in combination can make up a vocational qualification. There are two categories of units:

Mandatory units - are core to a qualification and must be completed.

Optional units - candidates must choose the required number of individual units, specified in the qualification structure, to achieve the qualification.

Work-based projects

Work-based projects are a useful way for you to collect evidence to support any decision you made about a candidate’s performance. They are particularly appropriate in determining the level of a candidate’s underpinning knowledge and understanding where it may be insufficient to rely only on questioning and observation.

A project often involves the identification of a solution to a specific problem identified by you and/or the candidate (such as looking at ways to redress a recent drop in sales), or may be a structured programme of work built around a central situation or idea (such as the introduction of a new job rostering process).