

Marketing

QCF Units of Assessment

Final NVQ and TC Units

1st January 2011

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Title	Improve own performance in a business environment	
Skills CFA Unit No.	BA Q202	
WBA Unit No.	L/601/2469	
Level	2	
Credit Value	2	
GLH	6	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to improve own performance	1.1 Explain the purpose and benefits of continuously improving performance at work 1.2 Explain the purpose and benefits of encouraging and accepting feedback from others 1.3 Explain how learning and development can improve own work, benefit organisations, and identify career options 1.4 Describe possible career progression routes 1.5 Describe possible development opportunities	
2. Be able to improve own performance using feedback	2.1 Encourage and accept feedback from other people 2.2 Use feedback to agree ways to improve own performance in the workplace 2.3 Complete work tasks, using feedback given, to improve performance	
3. Be able to agree own development needs using a learning plan	3.1 Investigate and agree where further learning and development may improve own work performance 3.2 Confirm learning plan changes 3.3 Follow a learning plan 3.4 Review progress against learning plan and agree further learning updates, if required	

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about identifying way of improving performance at work by encouraging feedback from others and maintaining a learning plan to record new learning and career opportunities.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Skills CFA
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Laws 15.2 Administration
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	6

Title	Work with other people in a business environment	
Skills CFA Unit No.	BA Q205	
WBA Unit No.	Y/601/2474	
Level	2	
Credit Value	3	
GLH	10	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how your role fits with organisational values and practices	1.1 Describe the sector in which your organisation operates 1.2 Describe your organisation's missions and purpose 1.3 Compare your organisation to other types of organisation in your sector 1.4 Outline your responsibilities 1.5 Describe how your role fits into your organisation's structure 1.6 Describe how your role contributes to the organisation's operations 1.7 Outline the policies, procedures, systems and values of your organisation that are relevant to your role 1.8 Outline who you would consult if unsure about organisational policies, procedures, systems and values	
2. Understand how to work as part of a team to achieve goals and objectives	2.1 Explain the purpose of working with other people to achieve goals and objectives 2.2 Identify situations in which working with others can achieve positive results 2.3 Explain the purpose and benefits of agreeing work goals and plans when working with others 2.4 Describe situations in which team members might support each other 2.5 Describe ways of providing support to other people in a team 2.6 Explain the purpose of agreeing quality measures with a team	

<p>3. Understand how to communicate as part of a team</p>	<p>3.1 Explain the purpose of communicating with other people in a team</p> <p>3.2 Identify different methods of communication and when to use them</p>
<p>4. Understand the contribution of individuals within a team</p>	<p>4.1 Explain the purpose of recognising the strengths of others</p> <p>4.2 Explain the value of diversity within teams</p> <p>4.3 Explain the purpose of respecting individuals working within a team</p>
<p>5. Understand how to deal with problems and disagreements</p>	<p>5.1 Describe the types of problems and disagreements that may occur when working with other people in a team</p> <p>5.2 Describe ways of dealing with problems and disagreements when working with other people in a team</p>
<p>6. Understand the purpose of feedback when working as a team</p>	<p>6.1 Explain the purpose of giving and receiving constructive feedback</p> <p>6.2 Describe ways of using feedback to improve own work, and a team as a whole</p>
<p>7. Be able to work in a way that fits with organisational values and practices</p>	<p>7.1 Follow organisational policies, systems and procedures relevant to your role</p> <p>7.2 Apply relevant organisational values across all aspects of your work</p> <p>7.3 Work with outside organisations and individuals in a way that protects the image of your organisation, where relevant</p> <p>7.4 Seek guidance when unsure about organisational policies, systems, procedures and values</p>
<p>8. Be able to work in a team to achieve goals and objectives</p>	<p>8.1 Communicate effectively with other people in a team</p> <p>8.2 Contribute to the agreement of work objectives and quality measures with a team, to achieve a positive outcome</p> <p>8.3 Make sure work goals and objectives are achieved in a way that makes best use of own abilities in a team</p> <p>8.4 Provide support to members of a team if required</p>

	<p>8.5 Show respect for individuals in a team</p> <p>8.6 Make sure own work meets agreed quality standards and is on time</p>
9. Be able to deal with or refer problems in a team	<p>9.1 Identify problem(s) or disagreement(s) in a team</p> <p>9.2 Resolve problem(s) or disagreement(s) within limits of own authority and experience</p> <p>9.3 Refer problems as required</p>
10. Be able to use feedback on objectives in a team	<p>10.1 Contribute to providing constructive feedback on the achievement of objectives to a team</p> <p>10.2 Receive constructive feedback on own work</p> <p>10.3 Use feedback on achievement of objectives to identify improvements in own work</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about working within a team, sharing responsibility with others to make sure that a team can achieve agreed goals and objectives.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Skills CFA
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration

Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	10

Title	Support the co-ordination of an event	
Skills CFA Unit No.	BA Q224	
WBA Unit No.	D/601/2508	
Level	2	
Credit Value	3	
GLH	20	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the role and purpose of supporting the co-ordination of an event	1.1 Describe the range of support activities that may be required when supporting the co-ordination of an event 1.2 Identify the responsibilities involved in supporting the co-ordination of an event 1.3 Describe the types of problems that may occur during events and how to deal with these 1.4 Describe the points to observe when clearing and vacating an event 1.5 Describe the types of follow-up activities that may be required to carry out the co-ordination of an event	
2. Be able to support the co-ordination of an event	2.1 Contribute to the co-ordination of an event by: <ul style="list-style-type: none"> a) preparing the venue and making sure all necessary resources and supporting activities are in place b) arranging resources during an event, in line with agreed plans c) helping delegates to feel welcome d) meeting delegates' needs throughout an event e) resolving or referring problems, as required f) liaising with the management of the venue to make sure facility resources are in place g) clearing, and vacating the venue according to the terms of the contract 	

	h) preparing and circulating papers, or completing other follow up actions following the event, if required
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about supporting the co-ordination and delivery of an event.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Skills CFA
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	20

Title	Evaluate and improve own performance in a business environment
Skills CFA Unit No.	BA Q302
WBA Unit No.	F/601/2520
Level	3
Credit Value	3
GLH	22
Learning Outcomes	Assessment Criteria
The learner will	The learner can
1. Understand how to evaluate and improve own performance	1.1 Explain the purpose and benefits of continuously improving own performance in a business environment 1.2 Explain the purpose and value of encouraging and accepting feedback from others 1.3 Describe ways of evaluating own work 1.4 Explain the purpose and benefits of trying out possible improvements to own work 1.5 Evaluate how learning and development can improve own work, benefit organisations, and further own career 1.6 Compare possible career progression routes 1.7 Describe possible development opportunities 1.8 Justify the value of developing a learning plan
2. Be able to evaluate and improve own performance using feedback from others	2.1 Encourage and accept feedback from other people 2.2 Evaluate own work and use feedback from others to identify areas for improvement 2.3 Identify changes in ways of working needed to improve work performance 2.4 Complete work tasks using changed ways of working 2.5 Evaluate work completed and changed ways of working for improvements and effectiveness
3. Be able to use evaluation of own	3.1 Evaluate own performance and identify

performance to agree, develop and use a learning plan	<p>where further learning and development will improve own work</p> <p>3.2 Agree and develop a learning plan to improve own work performance, that meets own needs</p> <p>3.3 Follow a learning plan for improvement to own work</p> <p>3.4 Review progress against learning plan and make updates for improving own work and further learning</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about evaluating and improving your own performance in the workplace.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Skills CFA
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	22

Title	Contribute to running a project	
Skills CFA Unit No.	BA Q327	
WBA Unit No.	J/601/2549	
Level	3	
Credit Value	5	
GLH	30	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand how to contribute to agree to a project brief	1.1 Describe the difference between routine work and taking part in a project 1.2 Explain the advantages and disadvantages of using projects and when projects are appropriate 1.3 Explain the project-planning methodologies appropriate to the types of projects run and the tools that can be used to assist project planning and control 1.4 Explain the purpose and benefits of identifying stakeholders involved in the project 1.5 Explain the purpose of contributing to agreeing a project's purpose, scope, timescale, costs, aims and objectives 1.6 Explain the purpose of agreeing a budget for a project 1.7 Describe how to estimate types and quantity of resources needed to run a project 1.8 Describe how to identify project risks and develop contingency plans, if required	
2. Understand how to contribute to a project	2.1 Describe the types of information needed to monitor projects and the methods that can be used to give information 2.2 Describe how to estimate and control resources in an area of work during a project 2.3 Explain the purpose of reporting own progress during a project 2.4 Outline reasons for seeking advice in response to unexpected events	

	<p>2.5 Explain the purpose and benefits of contributing towards achieving projects within agreed timescales</p> <p>2.6 Explain the purpose and benefits of keeping records of all project activity within the scope of own work</p> <p>2.7 Describe different ways of communicating with those involved in or affected by a project to make sure it runs smoothly</p>
<p>3. Understand the purpose of contributing to the evaluation of a project</p>	<p>3.1 Describe different types of methods available to monitor projects</p> <p>3.2 Explain the purpose of making own contributions when evaluating projects</p> <p>3.3 Describe how to learn lessons for the future for own work</p>
<p>4. Be able to contribute to preparing and planning a project</p>	<p>4.1 Confirm the purpose of the project with all stakeholders</p> <p>4.2 Confirm project scope, timescale, aims and objectives</p> <p>4.3 Contribute to the preparation of a project specification</p> <p>4.4 Confirm all types of resources for all stakeholders</p> <p>4.5 Confirm with all stakeholders, the project plan and timed use of all types of resources for an area of work</p> <p>4.6 Contribute to identifying risks and develop contingency plans for an area of work</p>
<p>5. Be able to contribute to running a project</p>	<p>5.1 Implement a project</p> <p>5.2 Communicate with all stakeholders involved with or affected by a project</p> <p>5.3 Adapt project plans for stakeholders to respond to unexpected events and risks</p> <p>5.4 Provide interim reports on project progress to relevant stakeholders</p> <p>5.5 Achieve required outcomes for relevant stakeholders on time and to budget</p> <p>5.6 Seek advice in response to unexpected events, if required</p> <p>5.7 Keep records of project activity</p>

6. Be able to contribute to evaluating the outcomes of a project	6.1 Evaluate project for all stakeholders 6.2 Report on the degree to which a project met its aims and objectives for all stakeholders 6.3 Report on project strengths and areas for improvement for all stakeholders
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Additional Information about the unit	
Unit purpose and aim(s)	This unit is about contributing to achieving project's agreed aims and objectives as it impacts on stakeholders.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Skills CFA
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	30

Title	Agree a budget
Skills CFA Unit No.	BA Q330
WBA Unit No.	J/601/2552
Level	3
Credit Value	4
GLH	25
Learning Outcomes	
Assessment Criteria	
The learner will	The learner can
1. Understand how to develop budgets	1.1 Explain how to use estimations when developing a draft budget 1.2 Explain how to identify priorities and financial resources needed when preparing a budget 1.3 Explain the purpose and benefits of identifying priorities when preparing a budget 1.4 Explain the purpose and benefits of evaluating and justifying estimated costs and income 1.5 Describe procedures for negotiating superseded budgets 1.6 Describe skills needed for agreeing budgets
2. Be able to agree a budget	2.1 Identify financial resources needed to achieve goals and objectives for agreeing a budget 2.2 Evaluate and justify costs and risks 2.3 Prepare a draft budget 2.4 Negotiate and agree a budget

Additional Information about the unit	
Unit purpose and aim(s)	This unit is about developing and agreeing a budget for a department or section within a business.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or	Skills CFA

curricula (if appropriate)	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 August 2010
Unit guided learning hours	25

Title	Principles of personal responsibilities and working in a business environment	
Skills CFA Unit Ref.	BATC 2-1	
WBA Unit No.	L/601/7638	
Level	2	
Credit Value	4	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Know the employment rights and responsibilities of the employee and employer	01.01 Identify the main points of contracts of employment 01.02 Identify the main points of legislation affecting employers and employees 01.03 Identify where to find information on employment rights and responsibilities both internally and externally 01.04 Describe how representative bodies can support the employee 01.05 Identify employer and employee responsibilities for equality and diversity in a business environment 01.06 Explain the benefits of making sure equality and diversity procedures are followed in a business environment	
02 Understand the purpose of health, safety and security procedures in a business environment	02.01 Identify employer and employee responsibilities for health, safety and security procedures in a business environment 02.02 Explain the purpose of following health, safety and security procedures in a business environment 02.03 Identify ways of maintaining a safe and secure environment in a business environment	

<p>03 Understand how to communicate effectively with others</p>	<p>03.01 Describe different methods of communication</p> <p>03.02 Explain how to choose the most appropriate method of communicating with others</p> <p>03.03 Describe ways of actively listening</p>
<p>04 Understand how to work with and support colleagues</p>	<p>04.01 Explain the purpose of agreeing standards for own work with others</p> <p>04.02 Explain the purpose of taking on new challenges and adapting to change</p> <p>04.03 Explain the purpose of treating others with honesty and consideration</p>
<p>05 Know how to plan own work and be accountable to others</p>	<p>05.01 Explain the purpose of meeting work standards and deadlines when completing tasks</p> <p>05.02 Identify ways of planning own work</p> <p>05.03 Compare ways of keeping other people informed about progress</p>
<p>06 Understand the purpose of improving own performance in a business environment and how to do so</p>	<p>06.01 Explain the purpose of continuously improving own performance in a business environment</p> <p>06.02 Describe ways of improving own performance in a business environment</p> <p>06.03 Identify different types of career pathways that are available</p>
<p>07 Understand the types of problems that may occur in a business environment and how to deal with them</p>	<p>07.01 Identify the types of problems that may occur in a business environment</p> <p>07.02 Explain ways of dealing with problems that may occur in a business environment</p> <p>07.03 Explain how and when to refer problems to relevant colleagues</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns understanding employment rights; health, safety and security; how to work with others and how to manage and improve own work in a business environment.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	BAA231; BAF172.
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Awarding organisations should use the learning outcomes and assessment criteria of this unit in their own specifications and assessment materials to define ranges as appropriate.
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 May 2010
Unit guided learning hours	32

Title	Principles of personal responsibilities and how to develop and evaluate own performance at work	
Skills CFA Unit Ref.	BATC 3-1	
Level	3	
Credit Value	4	
WBA Number	D/601/7644	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
01 Understand the employment rights and responsibilities of the employee and employer and their purpose	01.01 Identify the main points of contracts of employment and their purpose 01.02 Outline the main points of legislation affecting employers and employees and their purpose, including anti-discrimination and entitlement legislation 01.03 Identify where to find information on employment rights and responsibilities both internally and externally 01.04 Explain the purpose and functions of representative bodies that support employees 01.05 Explain employer and employee responsibilities for equality and diversity in a business environment 01.06 Explain the benefits of making sure equality and diversity procedures are followed in a business environment	
01 Understand the purpose of health, safety and security procedures in a business environment	02.01 Explain employer and employee responsibilities for health, safety and security in a business environment 02.02 Explain the purpose of following health, safety and security procedures in a business environment	
02 Understand how to manage own work	03.01 Explain the reasons for planning and prioritising own work 03.02 Identify ways of planning and prioritising own work 03.03 Explain the purpose of keeping other people informed about progress 03.04 Describe methods of dealing with pressure in a business environment	

<p>03 Understand how to evaluate and improve own performance in a business environment</p>	<p>04.01 Explain the purpose of continuously evaluating and improving own performance in a business environment</p> <p>04.02 Describe ways of evaluating and improving own performance in a business environment</p> <p>04.03 Explain the purpose of encouraging and accepting feedback from others</p> <p>04.04 Explain different types of career pathways and roles available</p>
<p>04 Understand the types of problems that may occur with own work and how to deal with them</p>	<p>05.01 Describe the types of problems that may occur with own work</p> <p>05.02 Explain ways of dealing with problems that may occur with own work</p> <p>05.03 Explain how and when to refer problems to relevant colleagues</p>
<p>05 Understand the decision making process</p>	<p>06.01 Explain key stages in the decision-making process</p> <p>06.02 Explain the purpose of not exceeding own limits of authority in making decisions</p>
<p>Additional Information about the unit</p>	
<p>Unit purpose and aim(s)</p>	<p>This unit is about understanding ones own responsibilities for action in a business environment, including legislative and contractual responsibilities and ways of managing and evaluating own work effectively.</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>BAA626; BAC312; BAF172.</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Awarding organisations should use the learning outcomes and assessment criteria of this unit in their own specifications and assessment materials to define ranges as appropriate.</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>

Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.2 Administration
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 May 2010
Unit guided learning hours	32

Title:	Develop customer relationships
Skills CFA ref:	ICS D1
Level:	2
Credit value:	6
Learning outcomes	Assessment criteria
<i>The learner will:</i>	<i>The learner can:</i>
1. build their customer's confidence that the service they give will be excellent	1.1 show that they behave assertively and professionally with customers 1.2 allocate the time they take to deal with their customer following organisational guidelines 1.3 reassure their customer that they are doing everything possible to keep the service promises made by the organisation
2. meet the expectations of their customers	2.1 recognise when there may be a conflict between their customer's expectations and your organisation's service offer 2.2 balance their customer's expectations with their organisation's service offer by offering an alternative or explaining the limits of the service offer 2.3 work effectively with others to resolve any difficulties in meeting their customer's expectations
3. develop the long-term relationship between their customer and their organisation	3.1 give additional help and information to their customer in response to customer questions and comments about their organisation's services or products 3.2 discuss expectations with their customer and explain how these compare with their organisation's services or products 3.3 advise others of feedback received from their customer 3.4 identify new ways of helping customers based on the feedback customers have given them 3.5 identify added value that their organisation could offer to long-term customers
4. know how to develop customer relationships	4.1 Describe their organisation's services or products 4.2 explain the importance of customer retention

	<p>4.3 explain how their own behaviour affects the behaviour of the customer</p> <p>4.4 describe how to behave assertively and professionally with customers</p> <p>4.5 describe how to defuse potentially stressful situations</p> <p>4.6 identify the limitations of their organisation's service offer</p> <p>4.7 compare how customer expectations may change as the customer deals with their organisation</p> <p>4.8 identify the cost and resource implications of an extension of the service offer to meet or exceed customer expectations</p> <p>4.9 explain the cost implications of bringing in new customers as opposed to retaining existing customers</p> <p>4.10 identify who to refer to when considering any variation to their organisation's service offer</p>
Additional information about the unit	
Owner's Reference	This Unit forms part of the Customer Service NVQ qualification 2010-2014
Unit aim(s)	<p>When the learner deals with their customers regularly, they want to make each occasion a good customer experience. The impression the learner creates and the way the service is delivered affects this in just the same way as when they deal with a customer only once. However, a longer-term relationship with a repeat customer also depends on building up their customer's confidence in the service that the learner offers. Loyalty and a long-term relationship rely on the customer having a realistic view of the organisation's service and being comfortable with it. The learner's customer will return to their organisation if they feel confident that they will receive excellent service because they have enjoyed good customer experiences with the learner before.</p>
Unit expiry date	31 December 2014
Details of the relationship between the unit and relevant national occupational standards (if appropriate)	This Unit directly relates to Unit D1 of the Customer Service NOS 2010
Details of the relationship between the	N/A

unit and other standards or curricula (if appropriate)	
Assessment requirements specified by a sector or regulatory body (if appropriate)	Specified in the Customer Service Assessment Strategy 2010
Endorsement of the unit by a sector or other appropriate body (if required)	Institute of Customer Service
Location of the unit within the subject/sector classification system	15. Business Administration and Law
Name of the organisation submitting the unit	City and Guilds
Availability for use	Available to all awarding organisations
Availability for delivery	1 st February 2010
Guided Learning Hours (glh)	40

Title	Database software	
Skills CFA Unit Ref.	ITQ unit	
WBA Unit No.	Y/500/7295	
Level	2	
Credit Value	6	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Know how to use a database	01.01 Describe what types of information the database has been designed for 01.02 Describe what types of design content are stored within the database 01.03 Identify what characteristics in a database fields may have, such as data type, field name, field size and field format 01.04 Describe how field characteristics can contribute to data validation 01.05 Describe why you would use a form for entering data into a database 01.06 Describe how to find and retrieve information from a database 01.07 Describe how data is structured in a simple (eg single-table, non-relational) database 01.08 Describe why it is important to maintain data integrity. What methods should be used to maintain data integrity in a simple (eg single-table, non-relational) database	

02 Use a database	<p>02.01 Use techniques for entering data into databases</p> <p>02.02 Create fields for entering data with the required field characteristics, name, type, size and format</p> <p>02.03 Modifying field characteristics within a simple (eg single-table, non-relational) database while maintaining the integrity of existing data, such as name, type and size</p> <p>02.04 Check data in databases</p> <p>02.05 Using automated facilities for checking data and reports (eg spell checking and sorting data)</p> <p>02.06 Carry out types of queries</p> <p>02.07 Produce & format reports</p> <p>02.08 Improving efficiency (eg Setting up short cuts)</p>
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Additional Information about the unit	
Unit purpose and aim(s)	
Unit expiry date	
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	E-skills
Availability for use	Shared
Unit available from	
Unit guided learning hours	30

Title	Collect and organise market research data
Skills CFA Unit Ref.	MK 2-1
WBA Unit No.	F/502/9923
Level	2
Credit Value	3
Learning Outcomes	Assessment Criteria
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:
01 Be able to collect market research data	01.01 Explain to research participants the purpose, use, timescale and level of confidentiality of the research 01.02 Use data collection techniques that are consistent with the research plan 01.03 Collect market research data within agreed timescales 01.04 Record data collected in accordance with the research plan 01.05 Adhere to organisational protocols and standards in the collection of market research data 01.06 Explain the difference between primary and secondary research
02 Be able to organise market research data	02.01 Validate the accuracy of the data 02.02 Organise quantitative and qualitative data in accordance with the requirements of the research plan 02.03 Present the information in the agreed format 02.04 Explain the objectives of the research 02.05 Explain the strengths and weaknesses of a range of analytical methods

03 Be able to use IT to manage market research data	03.01 Maintain the currency, completeness and accuracy of market research files 03.02 Enhance or amend files for use in targeting, segmentation and campaigns 03.03 Explain the impact of poor market research data management on an organisation
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Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to collect and organise market research data and use IT to manage market research data
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Marketing 1.2.4 Collect market research data Marketing 1.2.5 Analyse market research data Marketing 5.3.3 Use IT in managing marketing data
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	12

Title	Contribute to conducting direct marketing campaigns	
Skills CFA Unit Ref.	MK 2-2	
WBA Unit No.	J/502/9924	
Level	2	
Credit Value	3	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Be able to contribute to the planning of direct marketing campaigns	01.01 Agree materials that convey the marketing proposition and which comply with agreed quality and legal requirements 01.02 Identify the nature and location of target customers 01.03 Describe how their role contributes to the direct marketing campaign plan 01.04 Describe the objectives and target customers of the direct marketing campaign 01.05 Describe sources that would provide information about the nature and location of target customer groups 01.06 Explain how to reach target customers in accordance with the campaign plan 01.07 Explain the requirements of a data collection and reporting system that is capable of capturing the information required by the campaign plan	
02 Be able to conduct direct marketing campaigns	02.01 Ensure that the team is briefed on the objectives, actions and required standards of the campaign 02.02 Ensure that direct marketing materials are distributed in accordance with the campaign plan 02.03 Provide progress and variance reports in accordance with the campaign plan 02.04 Ensure that the direct marketing campaign is conducted in accordance with legal, regulatory and industry requirements and standards	

	<p>02.05 Explain the importance of briefing the team on the campaign requirements</p> <p>02.06 Explain the strengths and weaknesses of different types of direct marketing campaigns</p> <p>02.07 Explain how to address problems in accordance with the campaign plan</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to plan and conduct direct marketing campaigns
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	<p>Marketing 4.3.3 Implement door-drop marketing campaigns</p> <p>Marketing 4.3.4 Market to customers using media-inserts</p> <p>Marketing 4.3.5 Implement a direct-mailing marketing programme</p> <p>Marketing 4.3.6 Develop and implement direct-response tools within advertising</p> <p>Marketing 4.3.7 Execute direct mailing processes</p>
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	<p>15. Business, Administration and Law</p> <p>15.4 Marketing and Sales</p>
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	12

Title	Contribute to measuring the marketing response	
Skills CFA Unit Ref.	MK 2-3	
WBA Unit No.	L/502/9925	
Level	2	
Credit Value	4	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Be able to present information on the effectiveness of marketing campaigns	01.01 Collect quantitative and qualitative information in accordance with the evaluation plan 01.02 Organise information to enable analysis in accordance with the evaluation plan 01.03 Analyse the quantity and quality of responses against agreed criteria in accordance with their role in the evaluation plan 01.04 Evaluate the effectiveness of the response device(s) against the campaign objectives and agreed success criteria 01.05 Present the information within the agreed timescale in accordance with the evaluation plan 01.06 Make recommendations for future improvements based on an analysis of the responses to the campaign	
02 Understand the principles of measuring marketing responses	02.01 Explain the strengths and limitations of the campaign type, materials and response devices used 02.02 Explain the importance of the campaign's response system to the achievement of the marketing plan 02.03 Describe the importance of planning in successful marketing campaigns 02.04 Describe the use of IT in capturing and interpreting response data 02.05 Explain the legal requirements relating to data capture and subsequent use	

Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to assess the effectiveness of marketing campaigns and understanding the principles of measuring marketing responses
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Marketing 4.3.3 Implement door-drop marketing campaigns Marketing 4.3.4 Market to customers using media-inserts Marketing 4.3.5 Implement a direct-mailing marketing programme Marketing 4.3.6 Develop and implement direct-response tools within advertising Marketing 4.3.7 Execute direct mailing processes
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	21

Title	Use digital and social media in marketing campaigns	
Skills CFA Unit Ref.	MK 2-4	
WBA Unit No.	R/502/9926	
Level	2	
Credit Value	2	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Understand planning requirements for the use of digital and social media	01.01 Describe the importance of the objectives and budget for digital and social media marketing aligning with the marketing plan 01.02 Describe how to identify the nature and location of target customers 01.03 Describe sources of information about the nature and location of target customer groups 01.04 Explain the implications of retention and acquisition programmes as they affect the choice of digital/social media 01.05 Explain how to reach target customers in accordance with the plan 01.06 Explain the requirements of a data collection and reporting system that is capable of capturing the information required by the plan 01.07 Explain the importance of agreeing the message that conveys the marketing proposition	

<p>02 Be able to market to target customers using digital and social media</p>	<p>02.01 Ensure marketing messages are distributed in accordance with the plan</p> <p>02.02 Ensure that digital/social media marketing is conducted in accordance with legal, regulatory and industry requirements and standards</p> <p>02.03 Explain how to address problems in accordance with the plan</p>
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Additional Information about the unit	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns understanding planning requirements for the use of digital and social media and market to target customers using digital and social media</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Marketing 4.3.8 Market to target customers using digital/electronic media</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>15. Business, Administration and Law 15.4 Marketing and Sales</p>
<p>Name of the organisation submitting the unit</p>	<p>Skills CFA</p>
<p>Availability for use</p>	<p>Shared</p>
<p>Unit available from</p>	<p>1 January 2011</p>
<p>Unit guided learning hours</p>	<p>7</p>

Title	Analyse competitor activity
Skills CFA Unit Ref.	MK 3-1
WBA Unit No.	
Level	3
Credit Value	3
Learning Outcomes	Assessment Criteria
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:
01 Be able to identify competitor activity	01.01 Identify organisations competing for the same customers 01.02 Identify potentially threatening competitor activity 01.03 Identify competitors' objectives 01.04 Identify valid sources of information on competitors and their activity 01.05 Explain the advantages and disadvantages of sources of information on competitors and their activity
02 Be able to determine the nature of the threat posed by competitor activity	02.01 Assess the strengths and weaknesses of competitor activity against agreed criteria 02.02 Assess the strengths and weaknesses of competitors' products and/or services against agreed criteria 02.03 Determine the nature and extent of the possible threat posed by competitor activity and products and/or services

Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to identify competitor activity and determine the nature of the threat posed by competitors
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Marketing 1.1.3 Identify and monitor competitors' marketing strategies and activity
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	3

Title	Conduct market research	
Skills CFA Unit Ref.	MK 3-2	
WBA Unit No.		
Level	3	
Credit Value	6	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Be able to identify the need for market research	01.01 Establish the nature of the marketing issue for which information is needed 01.02 Agree the research budget and timescale 01.03 Agree specific, measurable, realistic and time-bound objectives	
02 Be able to design market research projects	02.01 Determine the research method(s) and instrument(s) best suited to obtaining the required information within budget 02.02 Establish the sources of reliable quantitative and qualitative information most likely to yield the required information 02.03 Develop a research project proposal and rationale that addresses the research objectives 02.04 Obtain approval to the specified actions, responsibilities, timescales and budget for the research 02.05 Explain the strengths and limitations of the ranges of proposed research methods 02.06 Explain the use of a sample in designing market research projects 02.07 Explain the importance of validating information	

<p>03 Be able to manage market research data collection</p>	<p>03.01 Ensure that the team is briefed on the objectives and data collection tasks</p> <p>03.02 Ensure that data collection activities are carried out in accordance with the market research plan</p> <p>03.03 Provide progress and variance reports in accordance with the data collection plan</p> <p>03.04 Address issues and variances in accordance with the market research plan</p> <p>03.05 Ensure that the data collection is conducted in accordance with legal, regulatory and industry requirements and standards</p> <p>03.06 Present the data in the agreed format within the agreed timescale</p> <p>03.07 Evaluate the effectiveness of the market research data collection against agreed criteria</p>
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Additional Information about the unit	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to identify the need for market research, design market research projects and manage market research data collection</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Marketing 1.2.1 Define the need for market research</p> <p>Marketing 1.2.2 Design market research projects</p> <p>Marketing 1.2.3 Implement programmes to collect market research data</p> <p>Marketing 1.2.7 Collect data on the knowledge, attitudes and behaviours of target groups</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	

Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	10

Title	Evaluate market research data
Skills CFA Unit Ref.	MK 3-3
WBA Unit No.	
Level	3
Credit Value	3
Learning Outcomes	Assessment Criteria
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:
01 Be able to plan the evaluation of market research data	<p>01.01 Develop an evaluation plan that specifies the purpose, scope, objectives, budget, success criteria, format and timescale</p> <p>01.02 Identify methods, tools and techniques that are suitable for the evaluation and capable of delivering the required analysis within the timescale and budget</p> <p>01.03 Obtain the resources needed to carry out the evaluation</p> <p>01.04 Agree evaluation protocols and procedures with those commissioning research</p>
02 Be able to evaluate market research data	<p>02.01 Use agreed methods, tools and techniques in accordance with the evaluation plan</p> <p>02.02 Validate the data against agreed criteria</p> <p>02.03 Involve agreed research participants and stakeholders in accordance with the evaluation plan</p> <p>02.04 Identify issues, trends, themes, linkages and interdependencies from an analysis of the market research data</p> <p>02.05 Confirm the reliability and validity of the evaluation findings through comparative studies (against historical data and norms)</p> <p>02.06 Justify evaluation conclusions and recommendations with evidence</p> <p>02.07 Explain the advantages and</p>

	<p>disadvantages of a range of analytical methods, tools and techniques</p> <p>02.08 Explain how to resolve errors, inconsistencies, gaps and anomalies in market research data</p> <p>02.09 Explain the importance of reliability, validity and statistical confidence to the evaluation</p>
03 Be able to report on the evaluation of market research data	<p>03.01 Record the evaluation findings in a way that facilitates access, data manipulation and reporting</p> <p>03.02 Present the evaluation findings in the agreed format within the agreed timescale and budget</p> <p>03.03 Explain the implications of the evaluation findings to those commissioning the research in a way that they will understand</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns planning, carrying out and reporting on the evaluation of market research data
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Marketing 1.3.6 Analyse, interpret and synthesise data and research findings to inform social marketing strategy
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Unit available from	1 January 2011
Unit guided learning hours	12

Title	Contribute to the preparation of a marketing strategy	
Skills CFA Unit Ref.	MK 3-4	
WBA Unit No.		
Level	4	
Credit Value	6	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Be able to identify the trends and behaviour patterns of the target market	01.01 Establish target customers' trends and behaviour patterns 01.02 Evaluate the implications of identified trends and patterns 01.03 Assess threats to products and/or services arising from buying trends/patterns 01.04 Prioritise threats and opportunities to potential income and profitability against agreed criteria 01.05 Evaluate the strengths and weaknesses of sources of information on target customers' buying patterns 01.06 Explain the importance of evaluating threats and opportunities 01.07 Explain the advantages and disadvantages of a range of tools to identify threats and opportunities	

<p>02 Be able to contribute to the development of a marketing strategy</p>	<p>02.01 Prioritise marketing objectives for products and/or services to align with the overall marketing strategy</p> <p>02.02 Prioritise target market segments against agreed criteria</p> <p>02.03 Agree a marketing strategy that contains actions, contingencies, accountabilities, milestones, success criteria and budget</p> <p>02.04 Justify forecasted demand for products and/or services</p> <p>02.05 Identify realistic key performance indicators</p> <p>02.06 Specify monitoring arrangements that are capable of identifying variances from targets and expectations</p> <p>02.07 Identify sufficient resources to enable the delivery of the strategy</p>
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Additional Information about the unit	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to identify the trends and behaviour patterns of the target market and contribute to the development of a marketing strategy</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Marketing 1.3.2 Define the customer experience towards informing marketing strategy</p> <p>Marketing 3.1.1 Develop marketing strategies and plans for products and services</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>15. Business, Administration and Law</p> <p>15.4 Marketing and Sales</p>

Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	25

Title	Contribute to the development of new products and/or services	
Skills CFA Unit Ref.	MK 3-5	
WBA Unit No.		
Level	4	
Credit Value	4	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Be able to contribute to the assessment of marketing opportunities for new products and/or services	01.01 Identify opportunities from an analysis against agreed criteria, using tools that are appropriate for the task 01.02 Establish target customers' perception and likely use(s) of the product and/or service 01.03 Assess the likely impact of customers' culture and behaviours on potential sales 01.04 Identify the nature of potential threats posed by competitors 01.05 Describe political, economic, social, technological and legal factors to be taken into account when assessing marketing opportunities for new products and/or services 01.06 Explain the advantages and disadvantages of a range of tools to identify market opportunities and threats	
02 Be able to establish requirements for new products and/or services	02.01 Specify how the proposed products and/or services align with the marketing strategy 02.02 Justify the recommendation to develop new products and/or services 02.03 Propose market test plans for products and/or services that contain specified actions, timescales, resource requirements and evaluation criteria 02.04 Explain how to distinguish between	

	<p>product ideas, concepts and image and the stages of development</p> <p>02.05 Explain how the power of a brand influences demand for new products and/or services</p> <p>02.06 Explain the advantages and disadvantages of different forms of market testing</p> <p>02.07 Describe sources for the generation of ideas for new products and/or services</p> <p>02.08 Explain the implications of competitor activity on the development of proposed new products and/or services</p> <p>02.09 Explain how to price new products and/or services</p> <p>02.10 Explain the advantages and disadvantages of different forecasting methods</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to assess marketing opportunities in new markets and establish requirements for new products and/or services
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	<p>Marketing 6.2.1 Assess marketing opportunities within international and/or diverse markets</p> <p>Marketing 3.2.1 Establish requirements for product/services</p> <p>Marketing 3.2.2 Develop new products/services</p>
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector	15. Business, Administration and Law

classification system	15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	16

Title	Maintain a portfolio of products and/or services
Skills CFA Unit Ref.	MK 3-6
WBA Unit No.	
Level	3
Credit Value	3
Learning Outcomes	Assessment Criteria
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:
01 Be able to develop and maintain a portfolio of products and/or services	01.01 Identify the market position of each product and/or service 01.02 Assess the market share of each product and/or service 01.03 Forecast likely sales growth and market share growth for each product and/or service 01.04 Establish how changes in sales and market share might be affected by different development strategies 01.05 Prioritise the fit of products and/or services within the overall marketing strategy 01.06 Recommend building market share, holding share, harvesting or divesting of each product and/or service based on an analysis of their likely profitability 01.07 Agree the options, actions and budget for development/maintenance in accordance with the marketing strategy

<p>02 Understand the principles underpinning portfolio maintenance</p>	<p>02.01 Explain the importance of portfolio planning to the achievement of the marketing strategy</p> <p>02.02 Explain the use of techniques for classifying different levels of performance of products and/or services</p> <p>02.03 Describe the factors to be taken into account when assessing the performance of products and/or services</p> <p>02.04 Explain the advantages and disadvantages of different forecasting techniques</p>
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Additional Information about the unit	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to maintain a portfolio of products and/or services</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Marketing 6.1.3 Develop and maintain a portfolio of products/services</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>15. Business, Administration and Law 15.4 Marketing and Sales</p>
<p>Name of the organisation submitting the unit</p>	<p>Skills CFA</p>
<p>Availability for use</p>	<p>Shared</p>
<p>Unit available from</p>	<p>1 January 2011</p>
<p>Unit guided learning hours</p>	<p>17</p>

Title	Design marketing promotions	
Skills CFA Unit Ref.	MK 3-7	
WBA Unit No.		
Level	3	
Credit Value	3	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Be able to identify the nature of need for marketing promotions	01.01 Justify recommendations on an analysis of sales performance, market factors, buyer and competitor activity 01.02 Determine the affordability of a marketing promotion 01.03 Assess the likely impact of the proposed marketing promotions on demand 01.04 Identify the implications of marketing promotions for other products and/or services 01.05 Develop contingencies to address identified risks associated with marketing promotions 01.05 Set realistic and achievable marketing promotion targets in accordance with the marketing plan 01.06 Describe how to carry out a cost-benefit analysis and establish profitability levels 01.07 Describe the level of returns on investments needed for products and/or services	
02 Be able to design marketing promotions	02.01 Devise marketing promotions that meet the marketing plan 02.02 Define the duration of the marketing promotion to maximise cost-efficiency 02.03 Justify proposals for marketing promotions with evidence 02.04 Explain the factors to be taken into account in planning marketing promotions	

	<p>02.05 Explain the advantages and disadvantages of different marketing promotions</p> <p>02.06 Explain the link between customer segments and proposed marketing promotions</p> <p>02.07 Explain how promotions fit within the overall marketing strategy</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to identify the nature of need for and plan marketing promotions
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Marketing 3.3.2 Design and implement price promotions
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	10

Title	Contribute to the development of a marketing plan	
Skills CFA Unit Ref.	MK 3-8	
WBA Unit No.		
Level	3	
Credit Value	3	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Be able to contribute to the development of a marketing plan	01.01 Identify the objectives to be achieved by the marketing plan 01.02 Identify the characteristics of the target market(s) 01.03 Evaluate the different methods of achieving the marketing objectives 01.04 Specify methods, actions, resources, timescales, milestones, budget and success criteria 01.05 Use feedback from stakeholders to enhance the marketing plan 01.06 Gain commitment for the marketing plan from stakeholders 01.07 Establish monitoring procedures that are capable of generating evaluative information	
02 Understand the principles underpinning the development of marketing plans	02.01 Explain the role of the marketing plan in achieving the overall marketing strategy 02.02 Explain the advantages and disadvantages of different methods of achieving the marketing objectives 02.03 Explain the importance of customer segmentation in the development of a marketing plan 02.04 Explain the roles and responsibilities of other marketing-related functions 02.05 Explain the legal, regulatory, social and ethical issues relevant to marketing plans	

Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to develop a marketing plan
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Marketing 4.2.3 Develop a media plan for advertising products/services Marketing 4.3.2 Develop direct marketing plans Marketing 4.5.1 Develop a sales promotion strategy and plan Marketing 4.6.1 Develop a field marketing strategy Marketing 4.6.2 Prepare an outline project plan for a field marketing activity
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	12

Title	Implement a marketing plan
Skills CFA Unit Ref.	MK 3-9
WBA Unit No.	
Level	3
Credit Value	4
Learning Outcomes	Assessment Criteria
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:
01 Be able to prepare for the implementation of marketing plans	01.01 Develop an implementation plan that specifies objectives, actions, responsibilities, budget, timescale and success criteria 01.02 Brief personnel on their roles and responsibilities in accordance with the marketing plan 01.03 Ensure the availability of agreed marketing resources 01.04 Explain the importance of understanding the nature of the market in which the activity is being targeted
02 Be able to implement marketing plans	02.01 Deliver the requirements of the plan within budget and timescale 02.02 Address risks, problems and variances from expectations in accordance with the marketing plan 02.03 Keep stakeholders up to date with progress, developments and issues 02.04 Record and report on the outcomes of the implementation in accordance with the marketing plan and organisational procedures 02.05 Explain the importance of the marketing activity to the success of the marketing strategy

Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to prepare for and implement marketing plans
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	<p>Marketing 3.4.3 Implement a marketing distribution plan</p> <p>Marketing 3.5.1 Develop a personal branding strategy and plan</p> <p>Marketing 4.2.4 Develop an advertising campaign</p> <p>Marketing 4.5.2 Manage sales promotion plans</p> <p>Marketing 4.5.3 Implement sales promotion activity</p> <p>Marketing 4.6.3 Implement a field marketing activity</p> <p>Marketing 4.7.2 Manage business to business motivation plans</p> <p>Marketing 6.1.2 Implement marketing strategies and plans for products/services</p> <p>Marketing 6.2.3 Implement and evaluate marketing plans for international and/or diverse markets</p>
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	5

Title	Evaluate the effectiveness of a marketing plan
Skills CFA Unit Ref.	MK 3-10
WBA Unit No.	
Level	3
Credit Value	4
Learning Outcomes	Assessment Criteria
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:
01 Be able to plan the evaluation of marketing activities	<p>01.01 Establish an evaluation framework which incorporates: a baseline; realistic and achievable objectives; key performance indicators and success criteria; process and impact evaluation mechanisms; feedback and communication mechanisms and mechanisms for calculating return on investment</p> <p>01.02 Agree evaluation resources with stakeholders</p> <p>01.03 Gain stakeholders' agreement to the methods, tools and techniques that are most suited to carry out the evaluation</p>
02 Be able to evaluate the effectiveness of the marketing plan	<p>02.01 Use agreed methods to evaluate quantitative and qualitative data against agreed success criteria</p> <p>02.02 Assess the impact of the marketing plan against agreed criteria</p> <p>02.03 Identify the reasons for variances in performance from expectations</p> <p>02.04 Recommend actions to address possible variances in accordance with the marketing plan</p> <p>02.05 Evaluate the quality, cost-effectiveness and cost-efficiency of the marketing activity against agreed criteria</p> <p>02.06 Report on the findings of the evaluation in the agreed format</p> <p>02.07 Use evaluation results to inform future strategic planning</p> <p>02.08 Explain the importance of evaluating</p>

	<p>marketing activities</p> <p>02.09 Explain the advantages and disadvantages of a range of evaluation methods</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to plan the evaluation of marketing activities and evaluate the effectiveness of the marketing plan
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	<p>Marketing 3.1.5 Evaluate and report on social marketing strategies</p> <p>Marketing 3.4.3 Implement a marketing distribution plan</p> <p>Marketing 3.5.1 Develop a personal branding strategy and plan</p> <p>Marketing 4.2.6 Evaluate advertising</p> <p>Marketing 4.5.2 Manage sales promotion plans</p> <p>Marketing 4.5.3 Implement sales promotion plans</p> <p>Marketing 4.6.3 Implement a field marketing activity</p> <p>Marketing 4.7.2 Manage business to business motivation plans</p> <p>Marketing 6.1.2 Implement marketing strategies and plans for products/services</p> <p>Marketing 6.2.3 Implement and evaluate marketing plans for international and/or diverse markets</p>
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector	15. Business, Administration and Law

classification system	15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	10

Title	Develop an advertising campaign	
Skills CFA Unit Ref.	MK 3-11	
WBA Unit No.		
Level	3	
Credit Value	3	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Be able to generate creative advertising options	<p>01.01 Develop concepts that: dramatise the agreed creative strategy; appeal to target customers; are distinctive and memorable; are ethical and sustainable and which differentiate the products and/or services from those of competitors</p> <p>01.02 Ensure that the style, tone, words and format combine coherently</p> <p>01.03 Prepare visualisations that illustrate proposed ideas in accordance with organisational procedures</p> <p>01.04 Present creative proposals to stakeholders in the agreed format</p> <p>01.05 Obtain stakeholders' agreement for the preferred option to proceed</p> <p>01.06 Explain the role of advertising within the customer's overall marketing strategy</p> <p>01.07 Explain the roles of those involved in the advertising creative and production processes</p> <p>01.08 Explain how intellectual property rights might affect advertising campaigns</p>	

<p>02 Be able to manage the implementation of advertising activities</p>	<p>02.01 Evaluate the suitability and cost-effectiveness of a range of media vehicles for the campaign</p> <p>02.02 Agree the schedule and pattern of advertising in accordance with agreed objectives</p> <p>02.03 Agree the media type(s), vehicles and schedule in accordance with agreed objectives</p> <p>02.04 Forecast anticipated response outcomes from advertising activities from an analysis of the target groups</p> <p>02.05 Agree response mechanisms that can be handled within resource constraints</p> <p>02.06 Agree monitoring processes that are capable of ensuring that the media schedule has been delivered</p> <p>02.07 Explain the importance of reach, frequency and impact in achieving advertising objectives</p> <p>02.08 Explain the role of each advertising medium in a consumer's life</p>
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Additional Information about the unit	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to generate creative advertising options and manage the implementation of advertising activities</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Marketing 4.2.2 Develop the creative product within advertising</p> <p>Marketing 4.2.3 Develop a media plan for advertising products/services</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector</p>	<p>15. Business, Administration and Law</p>

classification system	15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	10

Title	Specify the design requirement for marketing databases
Skills CFA Unit Ref.	MK 3-12
WBA Unit No.	
Level	3
Credit Value	3
Learning Outcomes	Assessment Criteria
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:
01 Be able to identify marketing database requirements	01.01 Identify marketing information requirements and its uses 01.02 Prioritise marketing information needs to meet the requirements of the marketing plan 01.03 Identify the nature, extent and possible uses of existing information 01.04 Prioritise the nature and extent of marketing information gaps to be filled 01.05 Calculate the cost of database design and marketing information acquisition 01.06 Evaluate the risks, potential consequences and cost of not acquiring information 01.07 Develop a business case, specifying needs, design solutions, costs, timescale, resources, uses and users and likely benefits 01.08 Explain the role of information systems in achieving the overall marketing strategy and objectives
02 Be able to specify marketing database capabilities	02.01 Specify the database's functionality in sufficient detail to ensure the database is fit for purpose 02.02 Ensure that the marketing database can be delivered within budget and timescale 02.03 Specify the uses and users of the marketing database 02.04 Specify the database such that

	<p>information can be manipulated for different purposes</p> <p>02.05 Obtain agreement from stakeholders to the proposed database</p> <p>02.06 Explain the importance of synergy between different databases</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to identify marketing database requirements and specify marketing database capabilities
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	<p>Marketing 5.1.1 Develop a customer information strategy</p> <p>Marketing 5.1.2 Implement a customer information strategy</p>
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	<p>15. Business, Administration and Law</p> <p>15.4 Marketing and Sales</p>
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	12

Title	Manage outsourced marketing supplier relationships
Skills CFA Unit Ref.	MK 3-13
WBA Unit No.	
Level	3
Credit Value	4
Learning Outcomes	Assessment Criteria
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:
01 Be able to plan work to be carried out by outsourced suppliers of marketing services	01.01 Brief suppliers on the scope, nature and objectives of the work to be carried out 01.02 Confirm that suppliers' proposed actions address targeted market segments 01.03 Agree a project plan containing a schedule of actions, key performance indicators and success criteria 01.04 Agree a monitoring programme that is capable of identifying variances from expected performance 01.05 Describe the objectives of the work for which the supplier has been contracted 01.06 Explain the roles, relationships, interdependencies and sensitivities of stakeholders
02 Be able to monitor the performance of suppliers of outsourced marketing services	02.01 Monitor progress against the agreed programme of key performance indicators 02.02 Identify variances from expected performance 02.03 Address variances in accordance with the project plan 02.04 Evaluate suppliers' performance against agreed success criteria 02.05 Use evaluative information and supplier feedback to enhance the effectiveness of future activities 02.06 Explain how stakeholders have been

	<p>engaged in project activities</p> <p>02.07 Explain the importance of monitoring suppliers' performance</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to plan work to be carried out by outsourced suppliers of marketing services and monitor their performance
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	7.2.4 Brief and work with third part suppliers of marketing/marketing communications suppliers 4.4.3 Build and manage stakeholder relationships
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	12

Title	Use digital technology for marketing purposes	
Skills CFA Unit Ref.	MK 3-14	
WBA Unit No.		
Level	3	
Credit Value	5	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Be able to use digital tools for marketing purposes	01.01 Create digital marketing publicity that optimises the use of search engines 01.02 Evaluate the cost-effective use of PayPerClick (PPC) facilities 01.03 Ensure the consistency and relevance of Meta Tags to the marketing message 01.04 Ensure that website content is keyword-rich 01.05 Use offsite Search Engine Optimisation (SEO) in a way that meets the marketing strategy 01.06 Explain the use of response systems in SEO activities 01.07 Explain the importance of a keyword strategy 01.08 Explain the benefits and risks of a link strategy	
02 Be able to carry out marketing research using the internet	02.01 Adapt and use browser facilities and search engines to identify required marketing information 02.02 Mine and extract marketing data using multiple selection criteria in accordance with the research specification 02.03 Identify marketing trends, patterns and opportunities from multiple-table relational databases 02.03 Explain the strengths and weaknesses of a range of tools and techniques to search the internet 02.04 Describe different ways of saving marketing information and sources of marketing information	

	<p>02.05 Explain how intellectual property rights affect the use of marketing information downloaded from the internet</p>
<p>03 Be able to create digital marketing devices and messages</p>	<p>03.01 Specify a Customer Relationship Management (CRM) system that is capable of identifying customer buying preferences and patterns</p> <p>03.02 Create a range of digital marketing devices that are targeted on identified market segments</p> <p>03.03 Create response systems appropriate for each marketing device</p> <p>03.04 Use tracking systems that are capable of adding value to marketing information databases</p>
<p>04 Be able to use digital technology for social media marketing purposes</p>	<p>04.01 Use CRM system to identify target customers</p> <p>04.02 Use the digital medium that is most appropriate for the marketing message to be conveyed</p> <p>04.03 Adopt writing and visual styles that are best suited to the chosen digital marketing medium</p> <p>04.04 Integrate the use of multiple digital tools and devices to optimise their marketing potential</p> <p>04.05 Present non-standard marketing reports and recommendations that are supported by statistical evidence</p> <p>04.06 Explain the strengths and weaknesses of a range of digital technologies for marketing purposes</p> <p>04.07 Explain the precautions used to prevent marketing messages being identified as “spam”</p> <p>04.08 Explain the structure of social networking sites</p> <p>04.09 Explain techniques for increasing hits on social networking sites</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able 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
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	ITQ L3 unit Using the internet
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	15

Title	Principles of marketing theory	
Skills CFA Unit Ref.	MKTC 2-1	
WBA Unit No.	D/502/9928	
Level	2	
Credit Value	4	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Understand how to segment the market	01.01 Explain the importance of defining market segments 01.02 Describe the difference between market segments and customer classifications 01.03 Explain how to cluster customers with similar characteristics 01.04 Describe how a range of products may appeal to different market segments 01.05 Describe the importance of valid and reliable marketing data to segmenting the market 01.06 Explain the strengths and weaknesses of different marketing data collection methods 01.07 Describe the use of Customer Relationship Management (CRM) activities and systems	
02 Understand the value of marketing	02.01 Describe the role of marketing in enhancing the sale of products and/or services 02.02 Explain the significance of customer loyalty to the achievement of marketing objectives 02.03 Explain the role of performance indicators and evaluation arrangements 02.04 Describe the factors to be taken into account when assessing the cost and value of marketing activities 02.05 Explain the significance of brand and reputation to sales performance	

<p>03 Understand the principles of socially responsible marketing</p>	<p>03.01 Explain the scope and purpose of socially responsible marketing</p> <p>03.02 Explain the importance of involving stakeholders in socially responsible marketing activities</p> <p>03.03 Explain how core values are expressed through coherent branding and chosen communication methods</p> <p>03.04 Explain the requirements of socially responsible marketing campaigns</p>
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Additional Information about the unit	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns understanding how to segment the market, the value of marketing and the principles of socially responsible marketing</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Marketing 1.2.7 Collect data on the knowledge, attitudes and behaviours of target groups</p> <p>Marketing 1.3.3 Establish and understand potential market segments</p> <p>Marketing 1.3.4 Establish target market segments for products/services and evaluate their potential</p> <p>Marketing 1.3.6 Analyse, interpret and synthesise data and research findings to inform social marketing strategy</p> <p>Marketing 2.1.3 Demonstrate the value of marketing to the organisation</p> <p>Marketing 4.1.3 Manage communications for social marketing programmes</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector</p>	<p>15. Business, Administration and Law</p>

classification system	15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	30

Title	Principles of customer relationships	
Skills CFA Unit Ref.	MKTC 2-2	
WBA Unit No.	Y/502/9930	
Level	2	
Credit Value	3	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Understand customers and their needs	01.01 Describe the importance of understanding customers' wants and needs 01.02 Explain the role of segmentation in identifying customers' likely wants and needs 01.03 Describe the factors that motivate customers to buy 01.04 Explain the importance of seeking customer feedback on performance, products and/or services	
02 Understand an organisation's responses to customer relationships	02.01 Describe an organisation's marketing objectives and activities 02.02 Explain the importance of developing customer service plans and customer relationship plans 02.03 Describe an organisation's system for relationship management 02.04 Describe an organisation's customer care programme 02.05 Describe the system for communicating with customers 02.06 Explain the importance of a consistent level of service 02.07 Explain the link between customer satisfaction and sales growth 02.08 Explain the importance of using customer feedback to enhance performance, products and/or services	
03 Understand the principles of customer	03.01 Explain the concept and principles of	

relationship management	<p>relationship management</p> <p>03.02 Explain the importance of keeping promises made to customers</p> <p>03.03 Explain the importance of balancing customers' needs with those of the organisation</p> <p>03.04 Explain the importance of keeping customers informed of progress, problems, issues and the actions undertaken in support of them</p> <p>03.05 Explain how to identify added value that could be offered to customers</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns understanding customers and their needs, organisations' responses to customer relationships and customer relationship management
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	<p>Marketing 7.1.2 Build and deliver customer service and customer care support</p> <p>Marketing 7.1.3 Build and retain effective sales relationships</p> <p>Marketing 7.1.4 Assist in the development of sales support and customer management programmes</p> <p>ICS unit D1</p>
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	<p>15. Business, Administration and Law</p> <p>15.4 Marketing and Sales</p>
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Unit available from	1 January 2011
Unit guided learning hours	18

Title	Principles of digital marketing	
Skills CFA Unit Ref.	MKTC 2-3	
WBA Unit No.	D/502/9931	
Level	2	
Credit Value	5	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Understand the role of digital marketing	01.01 Explain the role of digital marketing within the overall marketing strategy 01.02 Explain the strengths and weaknesses of digital marketing 01.03 Explain the importance of targeted digital marketing 01.04 Describe the sources of data lists for use in targeting customers and potential customers 01.05 Explain the legal requirements and implications of digital marketing 01.06 Describe the importance of digital data capture systems for digital marketing	
02 Understand the use of search engine optimisation (SEO)	02.01 Describe the use of SEO 02.02 Explain the importance of SEO 02.03 Explain the advantages and disadvantages of links to other websites	
03 Understand the requirements of marketing research using the internet	03.01 Explain how to use search-related internet facilities to enable the identification and retrieval of targeted information 03.02 Explain the advantages and disadvantages of different internet data collection sources 03.03 Explain the importance of confirming the accuracy of information retrieved from the internet	

<p>04 Understand the uses of digital marketing devices and messages</p>	<p>04.01 Describe the potential uses of a Customer Relationship Management (CRM) system</p> <p>04.02 Explain the importance of data cleansing</p> <p>04.03 Describe the use of digital marketing devices</p> <p>04.04 Describe the use of digital response systems</p> <p>04.05 Explain the advantages and disadvantages of different tracking systems</p>
<p>05 Understand how to use digital technology for marketing purposes</p>	<p>05.01 Explain how to use a CRM system</p> <p>05.02 Explain how to maintain the currency and accuracy of digital databases</p> <p>05.03 Explain the advantages and disadvantages of different digital technologies</p> <p>05.04 Describe the importance of tailoring messages to different digital media</p> <p>05.05 Explain the potential for marketing to social networking sites</p> <p>05.06 Explain how to prevent marketing messages being identified as “spam”</p>

Additional Information about the unit	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns understanding the role of digital marketing, the use of search engine optimisation (SEO), the requirements of marketing research using the internet, the uses of digital marketing device and messages and how to use digital technology for marketing purposes</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Marketing 4.3.8 Market to target customers using digital/electronic media</p> <p>Marketing 4.3.9 Communicate using multiple digital marketing channels</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if</p>	

appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	40

Title	Principles of market research	
Skills CFA Unit Ref.	MKTC 3-1	
WBA Unit No.	K/502/9933	
Level	3	
Credit Value	5	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Understand the basis on which market research is commissioned	01.01 Describe how to identify the need for market research and the sources of evidence to support this 01.02 Describe the basis for scoping the research and identifying linkages, interdependencies and the possible impact of one element on others 01.03 Explain how to set research parameters, aims and evaluation criteria 01.04 Explain the importance of involving stakeholders in the definition of research to be carried out 01.05 Explain how to evaluate different options for conducting the research	
02 Understand how to design market research projects	02.01 Explain how to set research objectives, timescales, budget and resource requirements and success criteria 02.02 Explain how to specify the characteristics and size of the sample to be researched in accordance with the research aims and objectives 02.03 Describe the factors to be taken into account when selecting research instruments that are fit for purpose 02.04 Explain how to ensure the suitability of methods chosen to conduct research 02.05 Explain the strengths and limitations of quantitative and qualitative research 02.06 Explain how risks inherent in market	

	<p>research may be addressed</p> <p>02.09 Explain how to ensure that research data collected is valid and reliable</p> <p>02.10 Describe the uses of the research outputs</p> <p>02.11 Explain how to obtain approval to the proposed research</p>
<p>03 Understand the principles of marketing data collection</p>	<p>03.01 Explain the difference between primary and secondary research and how this affects data collection methods and interpretation</p> <p>03.02 Describe the importance of using research instruments correctly</p> <p>03.03 Explain the role of data collection in a market research project</p> <p>03.04 Explain how to address problems arising in data collection (eg insufficiency of representative sample, unreliable or invalid data)</p> <p>03.05 Explain the importance of accurate data collection and recording</p> <p>03.06 Explain marketing data storage, security and access requirements</p>
<p>04 Understand the principles of marketing data interpretation and evaluation</p>	<p>04.01 Explain the volume of data needed to ensure statistical confidence</p> <p>04.02 Explain how to evaluate the quality, reliability and validity of market research data</p> <p>04.03 Describe the use(s) of market research</p> <p>04.04 Explain the application, strengths and weaknesses of different data analysis methods</p> <p>04.05 Explain the use of statistical tools to identify trends, causes and correlations in marketing data</p> <p>04.06 Explain the strengths and weaknesses of different data evaluation methods</p> <p>04.07 Explain the basis on which to reach conclusions as to the usefulness of the research</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns understanding the basis on which market research is commissioned, how to design market research projects, the principles of marketing data collection and the principles of marketing data interpretation and evaluation
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Marketing 1.2.1 Define the need for market research Marketing 1.2.2 Design market research projects Marketing 1.2.4 Collect market research data Marketing 1.2.7 Collect data on the knowledge, attitude and behaviours of target groups
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	40

Title	Principles of marketing and evaluation	
Skills CFA Unit Ref.	MKTC 3-2	
WBA Unit No.	T/502/9935	
Level	3	
Credit Value	7	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Understand the principles of market segmentation	01.01 Explain the importance of defining market segments to the development and achievement of the marketing strategy 01.02 Explain the difference between market segments and customer classification 01.03 Explain how the characteristics, motivations and behaviours of potential target customers are identified 01.04 Explain how to cluster customers with similar characteristics 01.05 Describe how to confirm that proposed segments are real, distinctive, viable and their buying power measurable 01.06 Explain how to evaluate the profitability and stability of market segments 01.07 Describe how a range of products may appeal to different market segments 01.08 Explain the motivators and inhibitors that influence customer behaviour 01.09 Explain the use of Customer Relationship Management	

<p>02 Understand how to assess market opportunities for new products and/or services</p>	<p>02.01 Describe the economic and buyer behavioural factors to be taken into account when assessing new market opportunities</p> <p>02.02 Describe the cultural factors that are likely to affect customers' perception of products and/or services and sales performance</p> <p>02.03 Explain how to identify opportunities and threats in new markets and for new products in existing markets</p> <p>02.04 Explain how competitor and potential competitor activity may affect projected sales performance</p> <p>02.05 Explain the basis of recommendations to exploit new market opportunities</p>
<p>03 Understand the principles of marketing strategy development</p>	<p>03.01 Describe the topics to be addressed in a marketing strategy</p> <p>03.02 Explain the use of market analyses to inform the development of a marketing strategy</p> <p>03.03 Explain how to evaluate risks to the achievement of objectives</p> <p>03.04 Describe how to forecast sales by product and/or service</p> <p>03.05 Explain how to present a marketing strategy including aims, objectives, actions, accountabilities, resources, budgets and forecasts</p> <p>03.06 Explain the importance of engaging stakeholders in the development of a marketing strategy</p> <p>03.07 Explain the significance of customer loyalty to the achievement of marketing objectives and strategy</p> <p>03.08 Explain how to set performance indicators and evaluation arrangements that are capable of measuring returns on investment</p>
<p>04 Understand how to evaluate the effectiveness of a marketing strategy</p>	<p>04.01 Explain the importance of conducting the evaluation in accordance with the specification</p>

	<p>04.02 Describe the factors to be taken into account in the evaluation of the effectiveness of a marketing strategy</p> <p>04.03 Explain the strengths and weaknesses of different evaluation methods</p> <p>04.04 Describe how to identify trends and themes from evaluation data</p> <p>04.05 Explain how to ensure the reliability and validity of evaluation data</p> <p>04.06 Explain how to achieve an acceptable level of statistical confidence</p> <p>04.07 Explain how to address critical issues revealed by evaluation</p> <p>04.08 Explain the importance of justifying recommendations and conclusions with evidence</p> <p>04.09 Explain the use of impact analysis in the evaluation process</p> <p>04.10 Explain the importance of marketing to the achievement of business objectives and strategies</p> <p>04.11 Describe the links between corporate social responsibility and marketing strategies</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns understanding the principles of market segmentation, how to assess market opportunities for new products and/or services, the principles of marketing strategy development and how to evaluate the effectiveness of a marketing strategy
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	<p>Marketing 1.3.1 Evaluate and interpret findings and identify connections in complex data</p> <p>Marketing 1.3.3 Establish and understand potential market segments</p> <p>Marketing 1.3.4 Establish target market segments for products/services and evaluate their potential</p> <p>Marketing 1.3.6 Analyse, interpret and synthesise data and research findings to inform social marketing strategy</p> <p>STC 2-1 Principles of marketing theory</p> <p>Marketing 2.1.3 Demonstrate the value of marketing to the organisation</p> <p>Marketing 3.1.1 Develop marketing strategies and plans for products and services</p> <p>Marketing 4.2.6 Evaluate advertising</p> <p>Marketing 6.2.1 Assess marketing opportunities within international and/or diverse markets</p>
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	<p>15. Business, Administration and Law</p> <p>15.4 Marketing and Sales</p>

Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	50

Title	Principles of digital marketing and research	
Skills CFA Unit Ref.	MKTC 3-3	
WBA Unit No.	F/502/9937	
Level	3	
Credit Value	7	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Understand the role and requirements of digital marketing	01.01 Explain the role of digital marketing within the overall marketing strategy 01.02 Explain the strengths and weaknesses of digital marketing for different marketing applications 01.03 Explain the importance of targeted digital marketing 01.04 Describe the sources of data lists for use in targeting customers and potential customers 01.05 Explain the legal requirements and implications of digital marketing 01.06 Describe the design requirements of data capture and reporting systems for digital marketing 01.07 Explain the importance of evaluating the impact of digital marketing activities	
02 Understand the principles of search engine optimisation (SEO)	02.01 Explain the importance of search engine optimisation 02.02 Describe how to calculate the cost-efficiency of SEO 02.03 Explain the use of Meta Tags, website codes and keywords 02.04 Explain the use of offsite SEO in optimising marketing effectiveness 02.05 Explain the design principles of response systems 02.06 Explain the advantages and disadvantages of links to other websites	
03 Understand the principles of marketing research using the internet	03.01 Explain the scope for customising search-related internet facilities to	

	<p>enable the identification and retrieval of targeted information</p> <p>03.02 Explain the advantages and disadvantages of different data mining techniques</p> <p>03.03 Explain how to use multiple-table relational databases</p> <p>03.04 Explain how to ensure the validity and reliability of information retrieved from the internet</p>
<p>04 Understand the principles of digital marketing device and message design</p>	<p>04.01 Explain the potential uses of a Customer Relationship Management (CRM) system</p> <p>04.02 Explain the design requirements of a CRM system</p> <p>04.03 Describe the characteristics of an effective digital marketing device</p> <p>04.04 Describe the characteristics of an effective digital response system</p> <p>04.05 Explain the requirements, advantages and disadvantages of different tracking systems</p> <p>04.06 Explain how to overcome the barriers posed by non-interoperable technologies</p>
<p>05 Understand how to use digital technology for marketing purposes</p>	<p>05.01 Explain the implications for the use of digital technology of campaigns that are aimed at retention, acquisition and conversion</p> <p>05.02 Explain methods of managing digital databases including permission marketing and the application of suppressions/opt-outs</p> <p>05.03 Explain the advantages and disadvantages of different digital technologies and combination of technologies for a range of marketing applications</p> <p>05.04 Describe the characteristics of an effective digital marketing message</p> <p>05.05 Explain the requirements of marketing to social networking sites in contrast to</p>

	other targets
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Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns understanding the role and requirements of digital marketing, the principles of search engine optimisation (SEO), the principles of marketing research using the internet, the principles of digital marketing device and message design and how to use digital technology for marketing purposes
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Marketing 4.3.8 Market to target customers using digital/electronic media Marketing 4.3.9 Communicate using multiple digital marketing channels
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	50

Title	Principles of marketing stakeholder relationships	
Skills CFA Unit Ref.	MKTC 3-4	
WBA Unit No.	J/502/9938	
Level	3	
Credit Value	3	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Understand marketing stakeholder relationships	01.01 Explain the basis on which the need for marketing stakeholder relationships are identified and prioritised 01.02 Explain the use of stakeholder mapping in developing ways of building relationships 01.03 Describe the nature of interest of different stakeholder groups and how this affects the nature of relationships and communications 01.04 Explain the significance of stakeholders to the achievement of the overall marketing strategy 01.05 Describe the features of the market in which stakeholders operate 01.06 Describe how to establish stakeholders' attitudes to an organisation 01.07 Describe actual and potential synergies and conflicts between clients and other stakeholders	
02 Understand how to build and manage marketing stakeholder relationships	02.01 Explain how to identify common goals and potential synergy between stakeholders and an organisation 02.02 Explain the importance of engaging stakeholders in marketing activities 02.03 Explain the basis upon which stakeholder communications plans are developed 02.04 Explain the requirements of a	

	<p>competitor management strategy</p> <p>02.05 Explain the importance of agreeing common objectives with clients</p> <p>02.06 Describe the scope of generalist and specialist personnel that can be deployed in support of building long term relationships with clients</p>
03 Understand how to monitor and control marketing stakeholder relationships	<p>03.01 Explain the use of key performance indicators and success criteria in monitoring the effectiveness of stakeholder relationships</p> <p>03.02 Describe methods of monitoring the ongoing effectiveness of stakeholder relationships</p> <p>03.03 Explain the importance of effective stakeholder communications and feedback system</p> <p>03.04 Explain how changes in the market environment in which stakeholders operate may have an impact on relationships</p> <p>03.05 Explain how to develop strategies and plans that address changing stakeholder attitudes and needs</p> <p>03.06 Explain how to develop reporting systems that meet agreed success criteria</p> <p>03.07 Explain the importance of reviewing the effectiveness of collaborative arrangements with stakeholders</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns understanding marketing stakeholder relationships, how to build and manage marketing stakeholder relationships and how to monitor and control marketing stakeholder relationships
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards	Marketing 2.1.4 Identify and manage relationships with social marketing

or other professional standards or curricula (if appropriate)	<p>stakeholders</p> <p>Marketing 4.1.1 Develop and understanding of the client</p> <p>4.4.3 Build and manage stakeholder relationships</p> <p>Marketing 4.4.5 Manage business and political relationships and lobby for influence</p> <p>Marketing 4.4.6 Manage financial public relations and investor relations</p> <p>Marketing 7.3.3 Develop strategic relationships with major clients</p> <p>Marketing 7.4.4 Build and sustain collaborative relationships with other organisations (MSC D17)</p> <p>Marketing 7.1.6 Monitor and control relationship management activities</p>
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	<p>15. Business, Administration and Law</p> <p>15.4 Marketing and Sales</p>
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	16

Title:	Develop working relationships with colleagues and stakeholders
Skills CFA ref:	MSC D2a
Level:	4
Credit value:	4
Learning outcomes	Assessment criteria
<i>The learner will:</i>	<i>The learner can:</i>
1 Know how to identify stakeholders and their relevance to an organisation.	1.1 Identify an organisation's stakeholders. 1.2 Evaluate the roles, responsibilities, interests and concerns of stakeholders. 1.3 Assess the importance of identified stakeholders.
2 Understand how to establish working relationships with colleagues and stakeholders.	2.1 Clarify how to agree a common sense of purpose with colleagues and stakeholders. 2.2 Summarise how to create an environment of trust and mutual respect with colleagues and stakeholders.
3 Be able to create an environment of trust and mutual respect with colleagues and stakeholders.	3.1 Review and revise the needs and motivations of colleagues and stakeholders. 3.2 Demonstrate interaction with colleagues and stakeholders that allows respect for the views and actions of others.
Additional information about the unit	
Unit aim(s)	This unit will help learners to develop effective working relationships with colleagues and stakeholders.
Unit expiry date	
Details of the relationship between the unit and relevant national occupational standards (if appropriate)	MSC D2 Develop productive working relationships with colleagues and stakeholders

Details of the relationship between the unit and other standards or curricula (if appropriate)	
Assessment requirements specified by a sector or regulatory body (if appropriate)	
Endorsement of the unit by a sector or other appropriate body (if required)	Management Standards Centre
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	
Availability for use	Shared

Title	Understanding sales or marketing legal, regulatory and ethical requirements	
Skills CFA Unit Ref.	STC 2-3	
WBA Unit No.	F/502/8206	
Level	2	
Credit Value	2	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Understand an organisation's procedures for dealing with legal, regulatory and ethical requirements relating to sales or marketing	01.01 Describe an organisation's procedures for raising legal, regulatory and ethical concerns 01.02 Explain how the legal, regulatory and ethical requirements relate to the business of selling or marketing 01.03 Describe internal and external sources of information on legal, regulatory and ethical requirements 01.04 Explain how an "ethical approach" affects organisations in the sales environment 01.05 Explain the importance of contract law in sales 01.06 Explain the scope of legal, regulatory and ethical requirements in sales	
02 Understand the legal, regulatory and ethical limits of the sales or marketing role	02.01 Explain the legal, regulatory and ethical requirements relevant to the role 02.02 Describe the potential consequences of not complying with legal, regulatory or ethical requirements 02.03 Explain the importance of working within the limits of the role, responsibilities and authority 02.04 Explain the process for reporting legal, regulatory and ethical concerns 02.05 Explain the importance of clarity of communication with the customer to ensure common understanding of agreements and expectations	

Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns understanding the organisation's procedures for dealing with legal, regulatory and ethical requirements relating to sales or marketing and the legal, regulatory and ethical limits of the role
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales 2-7 SLS 77
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	

Title	Understanding the relationship between sales and marketing	
Skills CFA Unit Ref.	STC 3-3	
WBA Unit No.	F/502/8223	
Level	3	
Credit Value	3	
Learning Outcomes	Assessment Criteria	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
01 Understand the impact of different organisational structures on sales and marketing functions	01.01 Describe the features of different hierarchical organisational structures 01.02 Explain the effect of different hierarchical organisational structures on sales and marketing functions and their performance	
02 Understand the interface between sales and marketing functions	02.01 Explain the role and responsibilities of sales personnel 02.02 Explain the role and responsibilities of marketing personnel 02.03 Describe areas of synergy between the sales and marketing functions 02.04 Describe the benefits of collaborative working to the performance of an organisation 02.05 Explain potential causes of friction between the sales and marketing functions 02.06 Describe mutually acceptable solutions to identified sources of friction	
03 Understand product development processes	03.01 Explain the market features and trends relating to a product or service 03.02 Explain the wants and needs of an organisation's customer base 03.03 Describe the product development process 03.04 Describe how to prepare a business case for a product or service 03.05 Describe how to forecast sales of a product or service	

	<p>03.06 Describe the characteristics and benefits of a product or service</p> <p>03.07 Explain the importance and use of customer feedback in relation to product development</p>
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Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns understanding the impact of different organisational structures on sales and marketing functions, the interface between sales and marketing functions and product development processes
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	<p>Sales 3-8</p> <p>Sales 3-20</p> <p>Marketing NOS 7.4.2</p>
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	<p>15. Business, Administration and Law</p> <p>15.4 Marketing and Sales</p>
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 January 2011
Unit guided learning hours	