





**Pearson**  
**BTEC Level 3 Nationals**  
**Extended Certificate in**  
**Marketing**  
**Diploma in Marketing**  
**Extended Diploma in**  
**Marketing**  
**Specification**

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Issue 3

## **About Pearson**

We are the world's leading learning company operating in countries all around the world. We provide content, assessment and digital services to learners, educational institutions, employers, governments and other partners globally. We are committed to helping equip learners with the skills they need to enhance their employability prospects and to succeed in the changing world of work. We believe that wherever learning flourishes so do people.

This specification is Issue 3. We will inform centres of any changes to this issue. The latest issue can be found on our website.

*References to third-party material made in this specification are made in good faith. Pearson does not endorse, approve or accept responsibility for the content of materials, which may be subject to change, or any opinions expressed therein. (Materials may include textbooks, journals, magazines and other publications and websites.)*

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# Welcome

With a track record built over 30 years of learner success, BTEC Nationals are widely recognised by industry and higher education as the signature vocational qualification at Level 3. They provide progression to the workplace either directly or via study at a higher level. Proof comes from YouGov research, which shows that 62 per cent of large companies have recruited employees with BTEC qualifications. What's more, well over 100,000 BTEC students apply to UK universities every year and their BTEC Nationals are accepted by over 150 UK universities and higher education institutes for relevant degree programmes either on their own or in combination with A Levels.

## Why are BTECs so successful?

BTECs embody a fundamentally learner-centred approach to the curriculum, with a flexible, unit-based structure and knowledge applied in project-based assessments. They focus on the holistic development of the practical, interpersonal and thinking skills required to be able to succeed in employment and higher education.

When creating the BTEC Nationals in this suite, we worked with many employers, higher education providers and colleges to ensure that their needs are met. Employers are looking for recruits with a thorough grounding in the latest industry requirements and work-ready skills such as teamwork. Higher education needs students who have experience of research, extended writing and meeting deadlines.

We have addressed these requirements with:

- a range of BTEC sizes, each with a clear purpose, so there is something to suit each learner's choice of study programme and progression plans
- refreshed content that is closely aligned with employers' and higher education needs for a skilled future workforce
- assessments and projects chosen to help learners progress to the next stage. This means some are set by you to meet local needs, while others are set and marked by Pearson so that there is a core of skills and understanding that is common to all learners. For example, a written test can be used to check that learners are confident in using technical knowledge to carry out a certain job.

We provide a wealth of support, both resources and people, to ensure that learners and their teachers have the best possible experience during their course. See *Section 10 Resources and support* for details of the support we offer.

## A word to learners

Today's BTEC Nationals are demanding, as you would expect of the most respected applied learning qualification in the UK. You will have to choose and complete a range of units, be organised, take some assessments that we will set and mark, and keep a portfolio of your assignments. But you can feel proud to achieve a BTEC because whatever your plans in life – whether you decide to study further, go on to work or an Apprenticeship, or set up your own business – your BTEC National will be your passport to success in the next stage of your life.

Good luck, and we hope you enjoy your course.

## Collaborative development

Learners completing their BTEC Nationals in Marketing will be aiming to go on to employment, often via the stepping stone of higher education. It was, therefore, essential that we developed these qualifications in close collaboration with experts from professional bodies and organisations, and with the providers who will be delivering the qualifications. To ensure that the content meets providers' needs and provides high-quality preparation for progression, we engaged experts and mapped these qualifications to industry standards. We are very grateful to all the lecturers, teachers, employers, professional body representatives and other individuals who have generously shared their time and expertise to help us develop these new qualifications.

Organisations that have worked with us include:

- The Chartered Institute of Marketing
- The Gaming Table School of Marketing
- Walsall College
- Weston College.

In addition, universities, professional bodies and businesses have provided letters of support confirming that these qualifications meet their entry requirements. These letters can be viewed on our website.

### Summary of Pearson BTEC Level 3 National Extended Certificate, Diploma and Extended Diploma in Marketing specification Issue 3 changes

Summary of changes made between the previous issue and this current issue	Page number
<p><i>Unit 1: Careers in Marketing</i></p> <p>Content has been clarified:</p> <p><i>A3: The evolving marketing industry</i> – in the final sub-bullet the text 'Learning Aim B: Investigate careers in the marketing industry' has moved to the line below to form a sub heading.</p> <p><b>B4: Employment law</b> – under the third bullet, the second sub-bullet has changed from 'living wage' to 'National Living Wage'.</p>	Pages 25, 26.
<p><i>Unit 4: Applying Digital Marketing</i></p> <p>The content has been updated:</p> <p><i>A1: Principles of digital marketing</i> – under the sixth bullet, the first sub-bullet has changed to 'General Data Protection Regulations (GDPR)'.</p>	Page 59
<p><i>Unit 10: Work Experience in Marketing</i></p> <p>The content has been clarified and updated:</p> <p><i>B1: Requirements in employment and employer needs</i> – under the fifth bullet, the third sub-bullet has changed to 'General Data Protection Regulations (GDPR)'; the fifth sub-bullet has changed to 'equality'; the sixth sub-bullet has been deleted.</p>	Page 118

If you need further information on these changes or what they mean, contact us via our website at: [qualifications.pearson.com/en/support/contact-us.html](https://qualifications.pearson.com/en/support/contact-us.html).

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# Introduction to BTEC National qualifications for the marketing sector

This specification contains the information you need to deliver the Pearson BTEC Level 3 Nationals in Marketing. The specification signposts you to additional handbooks and policies. It includes all the units for these qualifications.

These qualifications are part of the suite of marketing qualifications offered by Pearson. In the suite there are qualifications that focus on different progression routes, allowing learners to choose the one best suited to their aspirations.

All qualifications in the suite share some common units and assessments, allowing learners some flexibility in moving between sizes. The qualification titles are given below.

In the suite, there are BTEC National qualifications for post-16 learners who want to specialise in a specific industry, occupation or occupational group. The qualifications give learners specialist knowledge and technical skills, enabling entry to an Apprenticeship or other employment, and progression to related higher-education courses. Learners taking these qualifications should benefit from having a significant level of employer involvement in their programmes.

In the marketing sector, these qualifications are:

Pearson BTEC Level 3 National Extended Certificate in Marketing (603/5283/8)

Pearson BTEC Level 3 National Diploma in Marketing (603/5282/6)

Pearson BTEC Level 3 National Extended Diploma in Marketing (603/5284/X).

The Extended Certificate (360 GLH), Diploma (720 GLH) and Extended Diploma (1080 GLH) qualifications in marketing are not currently recognised for performance measures.

This specification signposts all the other essential documents and support that you need as a centre in order to deliver, assess and administer the qualification, including the staff development required. A summary of all essential documents is given in *Section 7 Administrative arrangements*. Information on how we can support you with this qualification is given in *Section 10 Resources and support*.

The information in this specification is correct at the time of publication.

## Total Qualification Time

For all regulated qualifications, Pearson specifies a total number of hours that it is estimated learners will require to complete and show achievement for the qualification: this is the Total Qualification Time (TQT). Within TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities, such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve teachers and assessors in teaching, supervising and invigilating learners. Guided learning includes the time required for learners to complete external assessment under examination or supervised conditions.

In addition to guided learning, other required learning directed by teachers or assessors will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

BTEC Nationals have been designed around the number of hours of guided learning expected. Each unit in these qualifications has a GLH value of 60, 90, 120 or 180. There is then a total GLH value for the qualification.

Each qualification has a TQT value. This may vary within sectors and across the suite, depending on the nature of the units in each qualification and the expected time for other required learning. The following table shows all the qualifications in this sector and their GLH and TQT values.

## Qualifications, sizes and purposes at a glance

Title	Size and structure	Summary purpose
<b>Pearson BTEC Level 3 National Extended Certificate in Marketing*</b>	360 GLH (465 TQT) Equivalent in size to one A Level. Three units, of which all are mandatory. Mandatory content (100%). External assessment (33%).	This qualification may be taken alongside other Level 3 vocational qualifications and/or A Levels as part of a two-year, full-time study programme. It is designed to help learners progress to the workplace via an apprenticeship in marketing or a higher education programme.
<b>Pearson BTEC Level 3 National Diploma in Marketing*</b>	720 GLH (910 TQT) Equivalent in size to two A Levels. Seven units, of which six are mandatory. Mandatory content (92%). External assessment (17%).	This qualification may be taken as the main qualification or alongside another Level 3 vocational qualification or an A Level as part of a two-year, full-time study programme. It is designed to help learners progress to the workplace via an apprenticeship in marketing or a higher education programme.
<b>Pearson BTEC Level 3 National Extended Diploma in Marketing*</b>	1080 GLH (1400 TQT) Equivalent in size to three A Levels. Twelve units, of which seven are mandatory. Mandatory content (72%). External assessment (11%).	This qualification may be taken as the only qualification of a two-year, full-time study programme. It is designed to help learners progress to the workplace via an apprenticeship in marketing or a higher education programme.

\*These qualifications are not eligible for performance tables in England.

## Structures of the qualifications at a glance

This table shows all the units and the qualifications to which they contribute. The full structures for these Pearson BTEC Level 3 Nationals in Marketing are shown in *Section 2 Structure*. **You must refer to the full structure for the relevant qualification to select units and plan your programme.**

### Key

	Unit assessed externally	<b>M</b>	Mandatory units	<b>O</b>	Optional units
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Unit (number and title)	Unit size (GLH)	Extended Certificate (360 GLH)	Diploma (720 GLH)	Extended Diploma (1080 GLH)
1 Careers in Marketing	60	M	M	M
2 Marketing Principles	120	M	M	M
3 Customer Communications	180	M	M	M
4 Applying Digital Marketing	180		M	M
5 Branding Products and Services	60		M	M
6 Generating Customer Loyalty	60		M	M
7 Marketing an Event	120			M
8 Customer Immersion Experiences	60		O	O
9 Activating a Brand	60		O	O
10 Work Experience in Marketing	60		O	O
11 Influencer Marketing	60		O	O
12 Marketing Research for a Start-up Business	60		O	O
13 Corporate Social Responsibility	60		O	O

## Qualification and unit content

Pearson has developed the content of the new BTEC Nationals in collaboration with employers and representatives from higher education and relevant professional bodies. In this way, we have ensured that content is up to date and that it includes the knowledge, understanding, skills and attributes required in the sector.

Each qualification in the suite has its own purpose. The mandatory and optional content provides a balance of breadth and depth, while retaining a degree of choice for individual learners to study content relevant to their interests and progression choices. Also, the content may be applied during delivery in a way that is relevant to local employment needs.

The proportion of mandatory content ensures that all learners are following a coherent programme of study and acquiring the knowledge, understanding and skills that will be recognised and valued. Learners are expected to show achievement across mandatory units as detailed in *Section 2 Structure*.

BTEC Nationals require applied learning that brings together knowledge and understanding (the cognitive domain) with practical and technical skills (the psychomotor domain). This is achieved through learners performing vocational tasks that encourage the development of appropriate vocational behaviours (the affective domain) and transferable skills. Transferable skills are those such as communication, teamwork, research and analysis, planning and completing tasks to high standards, which are valued both in the workplace and in higher education.

Our approach provides rigour and balance, and promotes the ability to apply learning immediately in new contexts. Further details can be found in *Section 2*.

Centres should ensure that delivery of content is kept up to date. Some of the units within the specification may contain references to legislation, policies, regulations and organisations, which may not be applicable in the country you deliver this qualification in (if teaching outside of England), or which may have gone out-of-date during the lifespan of the specification. In these instances, it is possible to substitute such references with ones that are current and applicable in the country you deliver subject to confirmation by your Standards Verifier.

## Assessment

Assessment is designed to fit the purpose and objective of the qualification. It includes a range of assessment types and styles suited to vocational qualifications in the sector. For these qualifications, there are two main forms of assessment that you need to be aware of: external and internal.

### Externally-assessed units

Each external assessment for a BTEC National is linked to a specific unit. The unit developed for external assessment in the marketing suite is 120 GLH to allow learners to demonstrate breadth and depth of achievement. Each assessment is taken under specified conditions, then marked by Pearson and a grade is awarded. Learners are permitted to resit external assessments during their programme. You should refer to our website for current policy information on permitted retakes.

Examinations are used for external assessment of qualifications in the marketing suite – all learners take the same assessment at the same time, normally with a written outcome.

External assessments are available twice a year. For detailed information on the external assessments please see the table in *Section 2*. For further information on preparing for external assessment see *Section 5 Assessment structure and external assessment*.

## Internally-assessed units

Most units in the sector are internally assessed and subject to external standards verification. This means that you set and assess the assignments that provide the final summative assessment of each unit, using the examples and support that Pearson provides. Before you assess you will need to become an approved centre, if you are not one already. You will need to prepare to assess using the guidance in *Section 6 Internal assessment*.

In line with the requirements and guidance for internal assessment, you select the most appropriate assessment styles according to the learning set out in the unit. This ensures that learners are assessed using a variety of styles to help them develop a broad range of transferable skills. Learners could be given opportunities to:

- write up the findings of their own research
- use case studies to explore complex or unfamiliar situations
- carry out projects for which they have choice over the direction and outcomes
- demonstrate practical and technical skills using appropriate processes.

You will make grading decisions based on the requirements and supporting guidance given in the units. Learners may not make repeated submissions of assignment evidence. For further information see *Section 6*.

## Synoptic assessment

Synoptic assessment requires learners to demonstrate that they can identify and use effectively, in an integrated way, an appropriate selection of skills, techniques, concepts, theories and knowledge from across the whole sector as relevant to a key task. BTEC learning has always encouraged learners to apply their learning in realistic contexts using scenarios and realistic activities that will permit learners to draw on and apply their learning. For these qualifications we have identified units that contain a synoptic assessment task. Synoptic assessment should take place after the teaching and learning of other mandatory units in order for learners to be able to draw from the full range of content. The synoptic assessment gives learners an opportunity to independently select and apply learning from across their programmes in the completion of a vocational task. The particular unit that contains the synoptic tasks for this qualification is shown in the structure in *Section 2 Structure*.

## Language of assessment

Assessment of the internal and external units for these qualifications will be available in English. All learner work must be in English. A learner taking the qualifications may be assessed in British or Irish Sign Language where it is permitted for the purpose of reasonable adjustment. For information on reasonable adjustments see *Section 7 Administrative arrangements*.

## Grading for units and qualifications

Achievement in the qualification requires a demonstration of depth of study in each unit, assured acquisition of a range of practical skills required for employment or progression to higher education, and successful development of transferable skills. Learners achieving a qualification will have achieved across mandatory units, including external and synoptic assessment.

Units are assessed using a grading scale of Distinction (D), Merit (M), Pass (P), Near Pass (N) and Unclassified (U). The grade of Near Pass is used for externally-assessed units only. All mandatory and optional units contribute proportionately to the overall qualification grade, for example a unit of 120 GLH will contribute double that of a 60 GLH unit.

Qualifications in the suite are graded using a scale of P to D\*, **or** PP to D\*D\*, **or** PPP to D\*D\*D\*. Please see *Section 9 Understanding the qualification grade* for more details. The relationship between qualification grading scales and unit grades will be subject to regular review as part of Pearson's standards monitoring processes on the basis of learner performance and in consultation with key users of the qualification.

## UCAS Tariff points

The BTEC Nationals attract UCAS points. Please go to the UCAS website for full details of the points allocated.

# 1 Qualification purpose

In this section, you will find information on the purpose of this qualification and how its design meets that purpose through the qualification objective and structure. We publish a full 'Statement of Purpose' for each qualification on our website. These statements are designed to guide you and potential learners to make the most appropriate choice about the size of qualification suitable at recruitment.

## Pearson BTEC Level 3 National Extended Certificate in Marketing

### Who is this qualification for?

The Pearson BTEC Level 3 National Extended Certificate in Marketing is 360 GLH and is equivalent in size to one A Level. It may be taken alongside other Level 3 vocational qualifications and/or A Levels as part of a two-year, full-time study programme. For example, it could be taken alongside a Pearson BTEC Level 3 National Diploma in Creative Digital Media Production, Travel and Tourism, IT, Photography or Graphics, broadening learners' potential career options.

### What does this qualification cover?

The content of this qualification has been developed in consultation with employers and professional bodies. This ensures that the content is appropriate and consistent with current industry practice to enable learners to enter employment directly. Higher education institutions have been consulted to ensure it allows appropriate progression for those aspiring to go to higher-level study.

Learners taking this qualification will study three mandatory units:

- Careers in Marketing
- Marketing Principles (externally assessed)
- Customer Communications.

The mandatory content allows learners to develop their skills, supported by underpinning knowledge, and provides the opportunity for learners to relate these to the marketing industry.

### What could this qualification lead to?

The qualification is aimed at learners who are looking to progress to employment in the sector via an apprenticeship and whose aspirations may also be to enter higher education. The qualification is fully mapped to the CIM L3 Foundation Certificate in Professional Marketing. This means that it will be recognised by employers and will support entry into this industry as a marketing executive.

When combined with other Level 3 qualifications, this qualification also offers learners the opportunity to progress to a broad range of higher education programmes, including Higher National Diploma and bachelor degrees.

## Pearson BTEC Level 3 National Diploma in Marketing

### Who is this qualification for?

The Pearson BTEC Level 3 National Diploma in Marketing is 720 GLH and is equivalent in size to two A Levels. It may be taken as part of a two-year, full-time programme, possibly alongside another Level 3 vocational qualification or an A Level.

### What does this qualification cover?

The content of this qualification has been developed in consultation with employers and professional bodies. This ensures that content is appropriate and consistent with current industry practice, to enable learners to enter employment directly. Higher-education institutions have been consulted to ensure that content allows appropriate progression for those aspiring to go on to higher-level study.



Learners taking this qualification will study six mandatory units:

- Careers in Marketing
- Marketing Principles (externally assessed)
- Customer Communications
- Applying Digital Marketing
- Branding Products and Services
- Generating Customer Loyalty.

The mandatory content allows learners to develop their skills, supported by underpinning knowledge and gives learners the opportunity to relate this to the marketing industry.

Learners will also study one optional unit, allowing them to increase their marketing skills and knowledge in a given area of specialist interest, such as market research for a start-up business, influencer marketing and corporate social responsibility, or to complete a work placement to help support their progression.

### **What could this qualification lead to?**

The qualification is aimed at learners who are looking to progress to employment in the sector via an apprenticeship (for example Level 4 marketing executive, Level 4 digital marketing specialist or L4 event planner) and whose aspirations may also be to enter higher education. The qualification may be taken alongside a Pearson BTEC Level 3 National Extended Certificate in Travel and Tourism, Digital Creative Media Production, IT or Sport to support entry into a range of roles.

The qualification is mapped to the CIM L3 Foundation Certificate in Professional Marketing and the CIM L3 Foundation Certification in Professional Digital Marketing, thereby extending the range of employment opportunities available.

This qualification also offers learners the opportunity to progress to a higher-education programme, including a Higher National Diploma, and to a wider range of programmes, including degree programmes, when taken alongside another Level 3 qualification.

## **Pearson BTEC Level 3 National Extended Diploma in Marketing**

### **Who is this qualification for?**

The Pearson BTEC Level 3 National Extended Diploma in Marketing is 1080 GLH and is equivalent in size to three A Levels. It may be taken on its own as a two-year, full-time study programme.

### **What does this qualification cover?**

The content of this qualification has been developed in consultation with employers and professional bodies. This ensures that content is appropriate and consistent with current industry practice, to enable learners to enter employment directly. Higher-education institutions have been consulted to ensure that the content allows appropriate progression for those aspiring to go on to higher level study.

Learners taking this qualification will study seven mandatory units:

- Careers in Marketing
- Marketing Principles (externally assessed)
- Customer Communications
- Applying Digital Marketing
- Branding Products and Services
- Generating Customer Loyalty
- Marketing an Event.

The mandatory content allows learners to develop a wide range of skills, supported by underpinning knowledge, and provides the opportunity for learners to relate these to the marketing industry.

Learners will also study five optional units, allowing them to increase their marketing skills and knowledge across a range of specialist marketing areas, such as market research for a start-up business, influencer marketing, corporate social responsibility, activating a brand or customer immersion experiences, or to complete a work placement to help support their progression choices.

## What could this qualification lead to?

The qualification is aimed at learners who are looking to progress to employment in the sector and whose aspirations may also be to enter higher education.

The qualification is mapped to the CIM Level 3 Foundation Certificate in Professional Marketing and the CIM Level 3 Foundation Certification in Professional Digital Marketing, thereby extending the range of employment opportunities available.

This qualification also offers learners the opportunity to progress to a higher education programme, including a Higher National Diploma and a degree.

Learners should always check the entry requirements for degree programmes with specific higher education providers. After this qualification, learners can also progress directly into employment, however it is likely that many will do so via higher study.

As part of their higher study choices, learners may also choose to progress to a BTEC Higher National (HN) qualification. HNs are widely supported by higher education and industry as the principal vocational qualifications at Levels 4 and 5 and are designed to reflect the increasing need for high quality professional and technical education at Levels 4 and 5. They provide learners with a clear line of sight to employment and to a degree at Level 6 if they choose. The Pearson BTEC Level 3 National Extended Diploma in Marketing meets the admission requirements for:

- Pearson BTEC Level 4 Higher National Certificate in Business
- Pearson BTEC Level 5 Higher National Diploma in Business
- Pearson BTEC Level 5 Higher National Diploma in Business (Marketing).

## How does the qualification provide employability skills?

In the BTEC National units there are opportunities in the teaching and learning phase to give learners practice in developing employability skills. Where employability skills are referred to in this specification, we are generally referring to skills in the following three main categories:

- **cognitive and problem-solving skills:** using critical thinking, approaching non-routine problems applying expert and creative solutions, using systems and technology
- **interpersonal skills:** communicating, working collaboratively, negotiating and influencing, self-presentation
- **intrapersonal skills:** self-management, adaptability and resilience, self-monitoring and development.

There are specific requirements in some units for assessment of these skills where relevant, for example where learners are required to undertake real or simulated activities.

Many of the mandatory and specified optional units encourage learners to develop the specific practical skills that employers are looking for.

## How do these qualifications provide knowledge and skills for higher education?

All BTEC Nationals provide knowledge and skills that prepare learners for progression to university. The skills that universities value include:

- the ability to learn independently
- the ability to research actively and methodically
- being able to give presentations
- being active group members.

BTEC learners can also benefit from opportunities for deep learning, where they are able to make connections among units and select areas of interest for detailed study. BTEC Nationals provide a vocational context in which learners can develop the knowledge and skills required for particular degree courses, including:

- reading technical texts
- effective writing
- analytical skills
- creative development
- preparation for assessment methods used in degrees.

## 2 Structure

### Qualification structures

#### Pearson BTEC Level 3 National Extended Certificate in Marketing

##### Mandatory units

There are three mandatory units – two are internally assessed and one is externally assessed. Learners must achieve a Pass or above in all mandatory units.

Pearson BTEC Level 3 National Extended Certificate in Marketing				
Unit number	Unit title	GLH	Type	How assessed
<b>Mandatory units – learners complete and achieve all units</b>				
<b>1</b>	Careers in Marketing	<b>60</b>	<b>Mandatory</b>	Internal
<b>2</b>	Marketing Principles	<b>120</b>	<b>Mandatory</b>	External
<b>3</b>	Customer Communications	<b>180</b>	<b>Mandatory Synoptic</b>	Internal

## Pearson BTEC Level 3 National Diploma in Marketing

### Mandatory units

There are six mandatory units – five are internally assessed and one is externally assessed. Learners must achieve a Pass or above in all mandatory units.

### Optional units

Learners must complete at least one optional unit.

Pearson BTEC Level 3 National Diploma in Marketing				
Unit number	Unit title	GLH	Type	How assessed
<b>Mandatory units – learners complete and achieve all units</b>				
<b>1</b>	Careers in Marketing	<b>60</b>	<b>Mandatory</b>	Internal
<b>2</b>	Marketing Principles	<b>120</b>	<b>Mandatory</b>	External
<b>3</b>	Customer Communications	<b>180</b>	<b>Mandatory</b>	Internal
<b>4</b>	Applying Digital Marketing	<b>180</b>	<b>Mandatory Synoptic</b>	Internal
<b>5</b>	Branding Products and Services	<b>60</b>	<b>Mandatory</b>	Internal
<b>6</b>	Generating Customer Loyalty	<b>60</b>	<b>Mandatory</b>	Internal
<b>Optional units – learners complete one unit</b>				
<b>8</b>	Customer Immersion Experiences	<b>60</b>	<b>Optional</b>	Internal
<b>9</b>	Activating a Brand	<b>60</b>	<b>Optional</b>	Internal
<b>10</b>	Work Experience in Marketing	<b>60</b>	<b>Optional</b>	Internal
<b>11</b>	Influencer Marketing	<b>60</b>	<b>Optional</b>	Internal
<b>12</b>	Market Research for a Start-up Business	<b>60</b>	<b>Optional</b>	Internal
<b>13</b>	Corporate Social Responsibility	<b>60</b>	<b>Optional</b>	Internal

## Qualification structure

### Pearson BTEC Level 3 National Extended Diploma in Marketing

#### Mandatory units

There are seven mandatory units – six are internally assessed and one is externally assessed. Learners must achieve a Pass or above in all mandatory units.

#### Optional units

Learners must complete at least one optional unit.

Pearson BTEC Level 3 National Extended Diploma in Marketing				
Unit number	Unit title	GLH	Type	How assessed
<b>Mandatory units – learners complete and achieve all units</b>				
<b>1</b>	Careers in Marketing	<b>60</b>	<b>Mandatory</b>	Internal
<b>2</b>	Marketing Principles	<b>120</b>	<b>Mandatory</b>	External
<b>3</b>	Customer Communications	<b>180</b>	<b>Mandatory</b>	Internal
<b>4</b>	Applying Digital Marketing	<b>180</b>	<b>Mandatory</b>	Internal
<b>5</b>	Branding Products and Services	<b>60</b>	<b>Mandatory</b>	Internal
<b>6</b>	Generating Customer Loyalty	<b>60</b>	<b>Mandatory</b>	Internal
<b>7</b>	Marketing an Event	<b>120</b>	<b>Mandatory Synoptic</b>	Internal
<b>Optional units – learners complete five units</b>				
<b>8</b>	Customer Immersion Experiences	<b>60</b>	<b>Optional</b>	Internal
<b>9</b>	Activating a Brand	<b>60</b>	<b>Optional</b>	Internal
<b>10</b>	Work Experience in Marketing	<b>60</b>	<b>Optional</b>	Internal
<b>11</b>	Influencer Marketing	<b>60</b>	<b>Optional</b>	Internal
<b>12</b>	Market Research for a Start-up Business	<b>60</b>	<b>Optional</b>	Internal
<b>13</b>	Corporate Social Responsibility	<b>60</b>	<b>Optional</b>	Internal

## External assessment

This is a summary of the type and availability of external assessment. See *Section 5 Assessment structure and external assessment* and the units and sample assessment materials for more information.

Unit	Type	Availability
<b>Unit 2: Marketing Principles</b>	<ul style="list-style-type: none"><li>• Written examination set and marked by Pearson.</li><li>• 1.5 hours.</li><li>• 70 marks.</li></ul>	January and May/June First assessment May/June 2021

## Synoptic assessment

The mandatory synoptic assessment requires learners to apply learning from across each qualification to the completion of a defined vocational task.

Extended Certificate: in the assessment for *Unit 3: Customer Communications*, learners will apply their knowledge and understanding of the sector to understand the processes involved in creating a successful customer communications plan, identify the purpose of marketing communications, and prepare an outline customer communications plan.

Diploma: in the assessment of *Unit 4: Applying Digital Marketing*, learners will apply their knowledge and understanding of the sector to explore the principles of digital marketing practice, develop a digital marketing campaign for a specific organisation based on an assessment of the use of digital marketing, and review its effectiveness and potential contribution to the organisation.

Extended Diploma: in the assessment of *Unit 7: Marketing an Event*, learners will apply their knowledge and understanding of the sector to investigate how different types of marketing are used for events, develop and implement a marketing campaign and marketing materials for a selected event, and evaluate the success of the event marketing campaign.

In assessing the unit assignments will require learners to select from and apply their learning from across their programme. More information is given in the unit.

## Employer involvement in assessment and delivery

You are encouraged to give learners opportunities to be involved with employers. See *Section 4 Planning your programme* for more information.

## 3 Units

### Understanding your units

The units in this specification set out our expectations of assessment in a way that helps you to prepare your learners for assessment. The units help you to undertake assessment and quality assurance effectively.

Each unit in the specification is set out in a similar way. There are two types of unit format:

- internal units
- external units.

This section explains how the units work. It is important that all teachers, assessors, internal verifiers and other staff responsible for the programme review this section.

#### Internal units

Section	Explanation
<b>Unit number</b>	The number is in a sequence in the sector. Numbers may not be sequential for an individual qualification.
<b>Unit title</b>	This is the formal title that we always use and which appears on certificates.
<b>Level</b>	All units are at Level 3 on the national framework.
<b>Unit type</b>	This shows if the unit is internal or external only. See structure information in <i>Section 2 Structure</i> for full details.
<b>Guided learning hours</b>	Units may have a GLH value of 180, 120, 90 or 60. This indicates the numbers of hours of teaching, directed activity and assessment expected. It also shows the weighting of the unit in the final qualification grade.
<b>Unit in brief</b>	This is a brief formal statement on the content of the unit that is helpful in understanding its role in the qualification. You can use this in summary documents, brochures etc.
<b>Unit introduction</b>	This is designed with learners in mind. It indicates why the unit is important, how learning is structured, and how learning might be applied when progressing to employment or higher education.
<b>Learning aims</b>	These help to define the scope, style and depth of learning of the unit. You can see where learners should be learning standard requirements ('understand') or where they should be actively researching ('investigate'). You can find out more about the verbs we use in learning aims in <i>Appendix 1 Glossary of terms used for internally-assessed units</i> .
<b>Summary of unit</b>	This section helps teachers to see at a glance the main content areas against the learning aims and the structure of the assessment.
<b>Content</b>	This section sets out the required teaching content of the unit. Content is compulsory except when shown as 'e.g.'. Learners should be asked to complete summative assessment only after the teaching content for the unit or learning aim(s) has been covered.

Section	Explanation
<b>Assessment criteria</b>	<p>Each learning aim has Pass and Merit criteria. Each assignment has at least one Distinction criterion. A full glossary of terms used is given in <i>Appendix 1</i>. All assessors need to understand our expectations of the terms used.</p> <p>Distinction criteria represent outstanding performance in the unit. Some criteria require learners to draw together learning from across the learning aims.</p>
<b>Essential information for assignments</b>	<p>This shows the maximum number of assignments that may be used for the unit to allow for effective summative assessment, and how the assessment criteria should be used to assess performance.</p>
<b>Further information for teachers and assessors</b>	<p>This section gives you information to support the implementation of assessment. It is important that this information is used carefully alongside the assessment criteria.</p>
<b>Resource requirements</b>	<p>Any specific resources that you need to be able to teach and assess are listed in this section. For information on support resources see <i>Section 10 Resources and support</i>.</p>
<b>Essential information for assessment decisions</b>	<p>This section gives guidance for each learning aim or assignment on the expectations for Pass, Merit and Distinction standard. The section includes examples and clarification.</p>
<b>Links to other units</b>	<p>This section shows you the main relationship among units. This can help you to structure your programme and make the best use of the materials and resources available.</p>
<b>Employer involvement</b>	<p>This section gives you information on the units that can be used to get employers involved with learners. It will help you to identify the kind of involvement that is most likely to be successful.</p>



## External units

Section	Explanation
<b>Unit number</b>	The number is in a sequence in the sector. Numbers may not be sequential for an individual qualification.
<b>Unit title</b>	This is the formal title we use, it appears on certificates.
<b>Level</b>	All units are at Level 3 on the national framework.
<b>Unit type</b>	This shows if the unit is internal or external only. See structure information in <i>Section 2 Structure</i> for full details.
<b>Guided learning hours</b>	Units may have a GLH value of 180, 120, or 60 GLH. This indicates the numbers of hours of teaching, directed activity and assessment expected. It also shows the weighting of the unit in the final qualification grade.
<b>Unit in brief</b>	This is a brief formal statement on the content of the unit.
<b>Unit introduction</b>	This is designed with learners in mind. It indicates why the unit is important, how learning is structured, and how learning might be applied when progressing to employment or higher education.
<b>Summary of assessment</b>	This sets out the type of external assessment used and the way in which it is used to assess achievement.
<b>Assessment outcomes</b>	These show the hierarchy of knowledge, understanding, skills and behaviours assessed. It includes information on how this hierarchy relates to command terms in sample assessment materials (SAMs).
<b>Essential content</b>	For external units all the content is obligatory, the depth of content is indicated in the assessment outcomes and SAMs. The content will be sampled through the external assessment over time, using the variety of questions or tasks shown.
<b>Grade descriptors</b>	We use grading descriptors when making judgements on grade boundaries. You can use them to understand what we expect to see from learners at particular grades.
<b>Key terms typically used in assessment</b>	These definitions will help you analyse requirements and prepare learners for assessment.
<b>Resources</b>	Any specific resources that you need to be able to teach and assess are listed in this section. For information on support resources see <i>Section 10 Resources and support</i> .
<b>Links to other units</b>	This section shows the main relationship among units. This section helps you to structure your programme and to make the best use of materials and resources.
<b>Employer involvement</b>	This section gives you information on the units that can be used to get employers involved with learners. It will help you to identify the kind of involvement that is most likely to be successful.



## Index of units

This section contains all the units developed for this qualification.

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# Unit 1: Careers in Marketing

Level: **3**

Unit type: **Internal**

Guided learning hours: **60**

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## Unit in brief

Learners develop an understanding of the careers available in the marketing industry and of the skills, knowledge and behaviours required to work in the industry.

## Unit introduction

The marketing industry is constantly changing and growing, there are many different opportunities for employment. To have a successful career in marketing, it is vital that you understand the industry and the types of behaviour, values, skills and techniques required to participate in it.

In this unit, you will investigate how the marketing industry is organised in the UK. You will research the different careers in the public, private and voluntary sectors, and examine the qualifications, skills and experiences required to pursue each career. You will undertake an application and interview process for a selected career pathway, drawing on knowledge and skills from across the qualification to identify your strengths and areas for development. You will evaluate your performance to help you understand employability and technical knowledge and skills required to progress in a career in the industry.

This unit will give you the skills and knowledge you need to apply for a role in the marketing industry. The unit will help you to progress to employment and to marketing-related higher education and apprenticeships.

## Learning aims

In this unit you will:

- A** Examine the organisation of the marketing industry in the UK
- B** Investigate careers in the marketing industry
- C** Undertake recruitment activities for a job role in the marketing industry
- D** Reflect on own performance in the recruitment process to prepare for a career in the marketing industry.

## Summary of unit

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Examine the organisation of the marketing industry in the UK	<b>A1</b> Organisation and structure of marketing in the UK <b>A2</b> Factors affecting the marketing industry <b>A3</b> The evolving marketing industry	A report evaluating the organisation and development of the marketing industry, including careers and jobs in the marketing industry, and the associated health and safety at work and employment law.
<b>B</b> Investigate careers in the marketing industry	<b>B1</b> Accessing the marketing industry <b>B2</b> Careers in the marketing industry <b>B3</b> Skills and behaviours needed in the marketing industry <b>B4</b> Employment law	
<b>C</b> Undertake recruitment activities for a job role in the marketing industry	<b>C1</b> Personal skills audit for a career in the marketing industry <b>C2</b> Job application processes in the marketing industry <b>C3</b> Recruitment activities required to obtain a career in the marketing industry	A portfolio of evidence of the application process and associated preparatory materials, with an evaluation of the recruitment activities and post-recruitment reflection and development plan.
<b>D</b> Reflect on own performance in the recruitment process to prepare for a career in the marketing industry	<b>D1</b> Review of application and interview process <b>D2</b> Personal development planning	

## Content

### Learning aim A: Examine the organisation of the marketing industry in the UK

#### A1 Organisation and structure of marketing in the UK

- The size and impact of the marketing industry on the UK economy, locally, nationally.
- Organisation:
  - in-house
  - agencies, e.g. digital marketing agencies, market research agencies, PR consultancies, advertising agencies, communications agencies
  - freelance.
- Sectors in the industry:
  - public, private, voluntary, not-for-profit
  - social enterprises
  - business to business (B2B)
  - business to customer (B2C)
  - scope – local, national, international.
- Structure of marketing in the UK, e.g.:
  - customer support
  - advertising
  - branding
  - public relations
  - digital marketing
  - event management
  - market research
  - professional bodies
    - chartered – Chartered Institute of Marketing (CIM), Chartered Institute of Public Relations (CIPR)
    - non-chartered – Institute of Digital Marketing (IDM), Institute of Practitioners in Advertising (IPA), Direct Marketing Association (DMA), Market Research Society (MRS), Data and Marketing Association (DMA), Communications Advertising and Marketing Foundation (CAM), Institute of Promotional Marketing (IPM).

#### A2 Factors affecting the marketing industry

- Factors affecting marketing in organisations and employment opportunities:
  - economic factors
    - inflation rates
    - changes in disposable income
    - recession/growth
    - interest rates
  - socio-economic factors
    - wealth
    - attitudes
    - fashion and trends
    - customer confidence
    - social influences and pressures
    - marketing to vulnerable people, including children and those with protected characteristics
    - environment and sustainability

- technological factors
  - communication platforms
  - production processes
  - design processes
  - devices
  - reach
  - data-driven marketing
  - technological trends
  - obsolescence
- seasonal factors
  - seasons
  - public holidays
  - weather.
- Regulatory and legal factors, e.g.:
  - direct marketing and e-privacy – need for prior permission and opt-out, telephone, email and mail preference service, acceptance of cookies
  - regulators, e.g. Advertising Standards Authority (ASA), Committee of Advertising Practice (CAP), Direct Marketing Association (DMA), Cinema Advertising Association (CAA), Market Research Society (MRS)
  - codes of practice, e.g. Committee of Advertising Practice (CAP) non-broadcast code, covering print and online and CAP broadcast code, covering TV and radio
  - other regulations, e.g. General Data Protection Regulation (GDPR), Unfair Trading Regulations (UTRs)
  - sanctions – local trading standards, broadcast and non-broadcast sanctions.
- Barriers to engagement:
  - out-of-date customer profiling
  - irrelevant advertising
  - desensitisation: saturated online marketplace, over-abundance of messages and information
  - disengagement – creative appeal
  - non-customised messages, e.g. direct mail
  - lack of awareness of changing customer needs
  - confusing the customer
  - inconsistent brand message.
- Ethical factors:
  - promoting openness, honesty, fairness, and responsibility in all advertising
  - being transparent about who is paid to endorse products
  - treating consumers fairly, based on the nature of the product and the nature of the consumer, including young persons and children
  - considering the impact on vulnerable consumers
  - including marketing in its corporate and social responsibility (CSR) policy.
- Cultural factors:
  - organisation – strong core values shared with customers, actions and results as priority, team effort, centred on employees and innovation
  - demographic – understanding different target groups, e.g. ethnicity and family structure
  - personal behaviour – how to deal with colleagues appropriately, written and verbal communication, following policies and guidelines.



**A3 The evolving marketing industry**

- How marketing continues to change over time:
  - from information scarcity to detailed analytics
  - real-time customer engagement – automation of targeting and segmentation, speed of communication and use of data to update customer profiles
  - rapid evolution of technology
  - increase in content marketing
  - increase in story-driven marketing
  - social media influencers
  - incentivising shoppers to share, start conversations and recommend products online
  - greater use of marketing mix
  - artificial intelligence, e.g. visual search in retailing, augmented reality, social listening with sentiment analysis of customer feedback.

**Learning aim B: Investigate careers in the marketing industry****B1 Accessing the marketing industry**

- First steps into the industry and skills, e.g.:
  - Apprenticeships – work-related skills and specific marketing job-role skills
  - higher education – qualifications, interpersonal, organisational, numeracy, literacy, presentation, research and teamwork skills
  - marketing courses and job-specific qualifications
  - work experience, internships and shadowing – work-related skills and specific marketing job-role skills
  - networking, careers service and career fairs – communication, listening and questioning skills
  - speculative applications – researching and literacy skills
  - dedicated marketing, advertising and PR job listings, marketing agencies.

**B2 Careers in the marketing industry**

- Marketing as assistants and progression routes, e.g.:
  - market research
  - marketing executive
  - media buying
  - media planning
  - sales promotion
  - events management.
- Digital marketing as assistants and progression routes, e.g.:
  - digital copywriter
  - digital marketing
  - pay-per-click (PPC) specialisms
  - search engine optimisation (SEO) specialisms
  - social media management
  - web content management.
- Advertising as assistant and progression routes, e.g.:
  - advertising account executive
  - advertising account planning
  - advertising art
  - advertising copywriting.
- Public relations (PR) as assistant and progression routes, e.g.:
  - public affairs
  - public relations.

### **B3 Skills and behaviours needed in the marketing industry**

- Behaviours, e.g. reliability, organisation, commitment, resilience.
- Employability skills, e.g.:
  - literacy – writing and editing skills
  - numerical, data and analysis skills
  - commercial awareness and knowledge of internet trends
  - influence and persuasion
  - teamwork and cooperation
  - assimilation of information
  - consumer behaviour, psychology and relationship forming skills
  - working under pressure and stress management
  - technological skills
  - communication – verbal and non-verbal, listening, public speaking, negotiation, problem solving and networking skills
  - leadership skills
  - time management, organisation and planning.
- Specific technical skills, e.g. analytics, SEO, HTML/CSS, content management systems (CMS), content production, design skills, SQL.
- Experience and accomplishments, e.g. leadership, creativity, job-related employment, volunteer work, internships, work experience placements, travel.
- Qualifications:
  - sector specific
  - role specific.

### **B4 Employment law**

- Forms of employment and contracts:
  - full time, part time, fixed term and zero hours
  - self-employment/freelance, e.g. independent, subcontracted
  - apprenticeships
  - internships.
- employment legislation:
  - health and safety at work legislation
  - termination of contract and notice period
  - working time regulations
  - dismissal
  - appeals procedures
  - representation and trade unions.
- Remuneration:
  - National Minimum Wage
  - National Living Wage
  - starting salaries and salary scales
  - negotiating salaries (private sector): salary scale research, evidence of performance, timing.

## **Learning aim C: Undertake recruitment activities for a job role in the marketing industry**

### **C1 Personal skills audit for a career in the marketing industry**

- Career planning:
  - personal and career intentions
  - short-, medium- and long-term career aspirations with objectives for achieving them.
- Job description:
  - duties and responsibilities
  - qualities and behaviours
  - qualifications
  - skills
  - experience.
- Auditing for a specific role:
  - self-assessment, e.g.
    - self-assessment tools
    - SWOT
    - feedback, e.g. tutors, employers, peers
    - collecting evidence
  - behaviours
  - generic employability skills
  - specific technical skills
  - experience and accomplishments
  - qualifications.

### **C2 Job application processes in the marketing industry**

- Analysis and development of application:
  - analysis
    - job
    - company
    - personal and career intentions
    - comparing audit to job requirements
    - market sector and competitors
  - development
    - organising information
    - person specification
    - application form
    - personal CV
    - letter of application
    - portfolios, e.g. images, printed or online.

### **C3 Recruitment activities required to obtain a career in the marketing industry**

- Interview.
- Recruitment activities as part of a selection interview, e.g.:
  - job advert, CV and letter of application
  - responses to scenarios
  - practical tasks
  - presentation
  - meeting with staff.

- Application of skills, knowledge and understanding in recruitment activities:
  - appearance, punctuality and time keeping
  - technical skills related to role
  - background and make up of the company
  - structure of marketing industry
  - key responsibilities
  - communication skills required for recruitment activities
    - body language
    - listening and responding to questions
    - professional approaches
    - formal/technical language.

### **Learning aim D: Reflect on own performance in the recruitment process to prepare for a career in the marketing industry**

#### **D1 Review of application and interview process**

- Personal appraisal reference to job role, CV, letter of application and interview, e.g.:
  - preparation and planning
  - responding to questions
  - communicating knowledge and understanding
  - meeting requirements of the interview
  - organisation, punctuality and time management
  - communication – verbal and non-verbal
  - technical skills.
- Assessment of how the skills acquired support the development of employability skills.
- Methods of evaluating:
  - sources of feedback, e.g. peers, observers, interviewers
  - selection criteria from interview.

#### **D2 Personal development planning**

- Strengths.
- Areas for development.
- Skills development to be able to conduct and participate in interviews more effectively:
  - personal development plan towards a specific career in the marketing industry – areas for development
  - skills development and training
  - qualifications
  - experiences
  - targets and timescales – short, medium and long.
- Careers guidance and support available and education choices.
- Career development plan:
  - career intentions
  - higher levels
  - specialism and diversification
  - aims
  - milestones
  - measures
  - professional development activities, e.g. training, job shadowing, self-reflection, internships, voluntary work.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Examine the organisation of the marketing industry in the UK</b>		<b>AB.D1</b> Evaluate how the evolving marketing industry and job roles are influenced by factors affecting the industry.
<b>A.P1</b> Describe the organisation and structure of the marketing industry in the UK.	<b>A.M1</b> Assess how the factors affecting the marketing industry in the UK have had an impact on the evolving nature of the marketing industry.	
<b>A.P2</b> Explain the factors affecting the marketing industry in the UK.		
<b>Learning aim B: Investigate careers in the marketing industry</b>		
<b>B.P3</b> Describe different careers and progression routes in the marketing industry and their associated skills and behaviours.	<b>B.M2</b> Compare the different careers in the marketing industry and their related legislation, regulation and codes of practice.	
<b>B.P4</b> Explain how laws, regulations and codes of practice are implemented and complied with in the marketing industry.		
<b>Learning aim C: Undertake recruitment activities for a job role in the marketing industry</b>		<b>CD.D2</b> Demonstrate an effective application of marketing knowledge and skills within recruitment activities with insight into personal career progression.
<b>C.P5</b> Complete a personal skills audit identifying own suitability for a selected marketing job.	<b>C.M3</b> Demonstrate competent application of marketing knowledge and skills within recruitment activities.	
<b>C.P6</b> Prepare appropriate documentation for use in recruitment activities.		
<b>C.P7</b> Participate in recruitment activities showing appropriate knowledge and skills.		
<b>Learning aim D: Reflect on own performance in the recruitment process to prepare for a career in the marketing industry</b>		
<b>D.P8</b> Review own strengths and areas for development in response to feedback on own performance in the recruitment activities.	<b>D.M4</b> Develop competent and relevant personal development plan based on in-depth review of performance.	

## Essential information for assignments

The recommended structure of assessment is shown in the unit summary along with suitable forms of evidence. *Section 6 Internal assessment* gives information on setting assignments and there is further information on our website.

There is a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aims: A and B (A.P1, A.P2, B.P3, B.P4, A.M1, B.M2, AB.D1)

Learning aims: C and D (C.P5, C.P6, C.P7, D.P8, C.M3, D.M4, CD.D2)

## Further information for teachers and assessors

### Resource requirements

For this unit, learners must have access to the most up-to-date information on organisations with marketing departments and marketing agencies that they will be researching. They must be able to find current marketing industry career pathway information from websites and printed resources, and be able to develop appropriate technical skills.

### Essential information for assessment decisions

The list of job roles given is not exhaustive, other appropriate job roles can be considered.

The recruitment process in learning aim D can be carried out as a simulated exercise for assessment.

### Learning aims A and B

**For distinction standard,** learners will draw on varied economic, socio-economic, technological, seasonal, regulatory and legal, and ethical factors, drawing valid conclusions and justifications based on the assessment of varied and balanced information. They will consider key factors affecting the organisation and structure of the UK marketing industry. They will use specific examples of how the marketing industry is evolving. Learners will compare different careers in the marketing industry, assessing the challenges particular to different roles. They will use conclusions on the evolution of the industry to support their arguments on the impact this can have on marketing employment, skills and content development.

**For merit standard,** learners will carefully consider economic, socio-economic, technological, seasonal, regulatory and legal, and ethical factors affecting the marketing industry through detailed examination of its structure and organisation. They will provide relevant and accurate descriptions of the factors and relate them to how the marketing industry is changing. They will analyse the skills and responsibilities of different roles within the marketing industry at different levels and with different purposes. They will communicate the relevance of legislation, regulation and codes of practice to these different roles, making comparisons between the types of role and the necessary skills and qualities.

**For pass standard,** learners will give a clear, objective account of the organisation and structure of the marketing industry, its specific sectors, the types of organisation and the forms of marketing carried out by different organisations. Their description will be basic but will include all the elements that make up the marketing industry. They will also explain some of the factors affecting the marketing industry and how they are shaping and changing the sector, using relevant examples. They will offer some detail of the skills and behaviours required for different roles in the sector. They will show how some relevant laws, regulations and codes of practice are applied, maintained and complied with in the industry.

## Learning aims C and D

**For distinction standard,** learners will present the outcome of a methodical and detailed examination of their current skills. They will give a detailed rationale as to what they need to do to further prepare themselves for the application, recruitment and interview process for a career in the marketing industry. Learners will refer to their skills audit when planning for their short-, medium- and long-term career aspirations. Their performance in the interview will be logical, researched and confident, and will show excellent knowledge and understanding of marketing relevant to the job they are applying for.

**For merit standard,** learners will complete a competent and detailed skills audit, covering the qualifications, skills and experiences they have to date. They will clearly use this information and assessment of the role to produce sound and focused documentation for recruitment activities. They will participate in an application, recruitment and interview process for an appropriate career in marketing. In the interview, learners will demonstrate sound and consistent knowledge and understanding of marketing relevant to the industry and role. Learners will collect feedback on their interview, using it along with reflection to develop a logical and relevant development plan.

**For pass standard,** learners will complete a skills audit, outlining the qualifications, skills and experiences they have to date. They will use this information to produce relevant and coherent documentation for recruitment activities. They will participate in interview and recruitment activities for a career in marketing. In the recruitment activities, learners will demonstrate knowledge and understanding of marketing relevant to the industry and role. Learners will collect feedback on their interview and review their performance, covering general professional expectations, areas of strength and some areas for development.

## Links to other units

This unit links with all other units in the qualification.

## Employer involvement

This unit would benefit from employer involvement in the form of:

- links with a wide cross-section of organisations with diverse marketing professions, such as
  - advertising and marketing agencies
  - marketing consultants
  - self-employed digital marketing specialists, social media specialists and content marketing specialists
  - employees working in marketing departments in a range of large organisations, both for-profit and not-for-profit
  - marketing recruitment agencies
- talks from employees with contrasting roles from different organisations
- site visits to organisations in the marketing industry.



## Unit 2: Marketing Principles

Level: **3**

Unit type: **External**

Guided learning hours: **120**

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### Unit in brief

Learners will explore marketing principles and apply them to a variety of contexts.

### Unit introduction

Marketing is a dynamic field central to the success of all types of organisation.

In this unit, you will study a range of marketing activities, including investigating how research is used and how important it is to check that it is valid and reliable. You will look at how and why organisations segment the market and how and why marketing activities are adapted according to the different segments identified. You will understand consumer behaviour in a marketing context. You will explore the importance of marketing strategies and campaigns to support the ethos of an organisation and of the importance of adapting the 7Ps of the marketing mix to the stage of the product life cycle for a product or service.

This unit will help you to progress to a range of job opportunities in the marketing context, to further study in higher education and to a professional qualification.

### Summary of assessment

This unit is externally assessed under controlled time conditions. Pearson sets and marks the external assessment.

The external assessment will be one hour and 30 minutes.

The number of marks for the assessment is 70. The assessment availability is January and June each year.

The first assessment availability is June 2021.

Your centre needs to make sure your learners are:

- fully prepared to sit the external assessment
- entered for assessments at an appropriate time.

## Assessment outcomes

**AO1** Demonstrate knowledge and understanding of marketing principles

Command words: give, identify

Marks: range from 1 to 2 marks

**AO2** Apply knowledge and understanding of marketing principles to different situations and contexts

Command words: assess, discuss, evaluate, explain

Marks: range from 1 to 12 marks

**AO3** Analyse marketing information and data, demonstrating the ability to interpret the potential impact and influence on marketing

Command words: assess, discuss, evaluate, explain

Marks: range from 1 to 12 marks

**AO4** Evaluate evidence to make informed judgements about how marketing should be planned, developed and adapted

Command words: assess, evaluate

Marks: range from 1 to 12 marks

## Essential content

The essential content is set out under different content areas. Learners must cover all specified content before assessment takes place.

### A Marketing activities

#### A1 Role of marketing

Learners will develop an understanding of the role of marketing and its application and importance for exchanges between organisations, customers and suppliers of for-profit and not-for-profit organisations.

- Marketing as a management process:
  - identifying customers and their needs, expectations and preferences
  - analysing factors that influence customer purchasing, use and engagement decisions
  - assessing competition
  - evaluating marketing practices
  - developing communication strategies and materials
  - anticipating and stimulating demand or allegiance.
- Importance of marketing:
  - linking organisation and customer, supporting customers
  - linking marketing and other functions
  - supporting supply chain
  - providing information internally
  - building and maintaining reputation
  - building relationships with customers
  - maintaining relevance.
- Market type:
  - business to consumer (B2C)
  - business to business (B2B)
  - for-profit and not-for-profit.
- Market reach:
  - niche markets
  - mass markets.

#### A2 Business and organisation aims and marketing objectives

Learners will understand the importance of marketing organisations meeting marketing objectives to achieve the overall aim of the organisation.

- Business/organisation aims:
  - for-profit – to break even, to survive, to have loyal customers, to maximise profits and forward those profits to owners and shareholders
  - not-for-profit – to provide for society’s needs.
- Marketing objectives based on research:
  - research on – competitors, sales, profit and forecasts
  - SMART – specific, measurable, achievable, relevant and time-bound targets
    - customer satisfaction
    - maintain/increase sales/market share
    - maintain/increase revenue
    - build/increase brand awareness and loyalty
    - develop/launch new goods and services
    - customer retention
    - acquire new customers

- enter new markets
- enhance customer relationships
- understand the wants, needs and aspirations of customers
- gain an advantage over competitors
- engage stakeholders
- change buying behaviour
- encourage digital engagement.

## **B Researching and analysing the market**

### **B1 Researching the market**

Learners will understand the methods of gathering research using traditional and digital methods, and the importance of continuous market research to track changes over time, they will analyse marketing data.

- Role of market research:
  - determine business objectives
  - continuous analysis using digital and traditional methods
  - changes over time
  - size and structure of market
  - market segments
  - customer needs and preferences
  - customer experience and satisfaction
  - trends
  - awareness of brand
  - competition
  - internal and external factors
  - desirability of new products
  - feasibility of entry into new markets
  - customer perception.
- Primary market research methods:
  - interview/survey/questionnaire/polls
  - direct observation, visits and mystery shopping
  - focus groups and digital communities
  - test, trials and pilot studies.
- Secondary market research methods:
  - internal
    - data on customers
    - loyalty schemes
    - electronic point of sale (EPOS)
    - website monitoring
    - financial/accounting records
  - external
    - external company accounts and reports
    - government statistics
    - information from data companies and specialist market research agencies
    - trade journals and media sources.
- Quantitative and qualitative data.

**B2 Appropriateness, validity and reliability of research**

Learners will make judgements on the quality of market research.

- Appropriateness.
- Cost.
- Accuracy.
- Currency.
- Reliability: consistency or repeatability of results.
- Validity of sample intention, sufficiency and results.

**B3 The marketing environment**

Learners will know and understand the features of the marketing environment, how situations can change, the different marketing tools, how and why they are used, and the importance of these as the basis for making decisions.

- Macro environment:
  - political
  - economic
  - social
  - technological
  - environmental
  - legal/regulatory.
- Micro environment:
  - customers
  - competitors
  - suppliers
  - intermediaries
  - publics.
- Internal environment:
  - resources
    - financial
    - non-financial
  - people and their skills
  - equipment
    - systems
    - processes
    - digital capabilities.
- Tools used to assess the marketing environment:
  - PESTEL analysis of external factors affecting marketing
  - SWOT analysis of internal and external factors affecting marketing
    - strengths and weaknesses: internal analysis of production capacity, branding, product portfolio, staff skills, access to materials and suppliers
    - opportunities and threats: external analysis of market demand, changing technology, competitor strength
  - Ansoff Matrix – to determine product and market growth strategies
  - Boston Matrix – to classify products within the product portfolio into four distinct groups
  - market mapping – to identify where there are ‘gaps’ in the market
  - competitor analysis – to assess the strengths and weaknesses of competitors, to identify opportunities for improvement within an organisation
  - Porter’s Five Forces – threat of new entrants, threat of substitutes, competitive rivalry, bargaining power of suppliers, bargaining power of buyers.

## C Consumers and customers

### C1 Market segmentation, targeting and positioning

Learners will understand how and why B2B and B2C organisations segment the market, and how and why marketing activities are adapted according to the different segments identified.

- Target market segmentation:
  - demographics – age, race, religion, gender, family size, ethnicity, income, education level, disability, socio-economic group i.e. socio-economic status, MOSAIC
  - geographic – location
  - psychographic – social class, attitudes, lifestyle and personality characteristics
  - behavioural – spending, consumption, rate of usage, loyalty status, desired benefits
  - B2B targeting – organisation size, scope, purpose, culture, type of product, industry type, budget holder/purchasing decision maker, budget size.

### C2 Consumer buying behaviour

- Customer needs and wants:
  - functional benefits
  - emotional benefits
  - physiological benefits
  - luxury or necessity.
- Consumer behaviour processes:
  - what, how much, when, why
  - impulse purchases
  - routine purchases
  - limited decision making
  - extensive decision making.

### C3 Customer profiles

Learners will understand customer profiling within marketing practice.

- External customer: a person or external organisation who buys products.
- Internal customer: a person who is directly connected to the organisation, but not necessarily employed by them:
  - stakeholders
  - employees
  - shareholders.
- Consumer: a person or business who uses the products they have bought or were bought for them.
- Physical goods and intangible services.
- Customer profiles:
  - demographics – age, gender, occupation, income, education
  - psychographic
  - behavioural – using web analytics to create user profiles of individual consumers, regularity and preferred purchasing times.

## D Developing a marketing strategy using a coordinated marketing mix (7Ps)

Learners will understand how the marketing mix (4Ps of product, price, place and promotion, and extended 7Ps for the marketing of services) combines traditional and digital marketing methods to define a marketing strategy and campaign. Learners will understand the importance of coordinating strategies and campaigns to the ethos of an organisation and of adapting the marketing mix to the stage of the product life cycle.

### D1 Product

- Benefits, features and functions of tangible and intangible products:
  - design – functionality, ergonomics, usability, experience
  - technology – interface, supportive technology, peripheral technology
  - aesthetics – visual appearance, style, colour scheme, packaging
  - unique selling point (USP)
  - branding – brand personality and brand image.
- Augmented product: delivery, warranty, customer service, installation, after-sales service.
- Product portfolio: comprises all products of an organisation.
- Product life cycle:
  - development, introduction, growth, maturity, decline
  - diffusion of innovation.

### D2 Price

- Factors that determine the most appropriate pricing strategy for a situation:
  - USPs
  - product differentiation – design, performance, branding
  - amount of competition, physical and digital
  - stage in the product life cycle
  - costs and the need to make a profit.
- Pricing strategies: penetration, skimming, competitor-based, cost-plus, premium, psychological, destroyer.
- Relationship between cost, price and value.

### D3 Place

- Physical location (bricks and mortar).
- Digital sales (clicks)/e-commerce/smartphone and tablet apps.
- Physical location and digital sales (bricks and clicks).
- The means of distributing product to that place.

### D4 Promotion

- Communication through traditional and digital marketing methods:
  - channels
    - print: newspaper, magazine, brochure, catalogue, billboards, flyer, poster, banner, direct mail
    - digital – streaming, email, blog, social media, banner, pop-up
    - broadcast – TV, radio
    - traditional – direct mail, telephone, face to face
  - methods
    - advertising: above the line, below the line
    - sponsorship, endorsement
    - public relations (PR), online public relations (OPR)
    - social media, influencers, hashtag campaigns, viral marketing
    - personal selling, special offers
    - product placement
    - trade shows, exhibitions, event marketing
    - guerrilla marketing – pop-ups, interactive ads
    - branding – brand personality, brand image.

- Push and pull marketing:
  - push – tries to push products towards customers
  - pull – raises awareness and generates demand for a product, targets the right customers at the right time and pulls them towards a product.
- Multichannel marketing using a range of methods.
- Factors to consider when deciding on a marketing channel:
  - organisational objectives
  - ease of reaching target market
  - accessibility of information and contents of message
  - speed
  - cost
  - measurability of marketing success
  - competitors' activities
  - brand image and development.

#### **D5 People**

- Employees must:
  - be appropriately trained
  - be motivated
  - be suited to the role
  - have the right attitude
  - give consistent and reliable customer service
  - strive to exceed customer expectations
  - buy into the brand concept.

#### **D6 Process**

- Processes for handling orders.
- Methods of delivery.
- Customer service process.

#### **D7 Physical evidence**

- Physical evidence related to the product:
  - signage
  - displays
  - images
  - uniforms
  - branding.
- Physical presentation of the environment:
  - ambience
  - mood
  - sound, sight, smell, taste, touch
  - online and digital media.

#### **D8 Benefits of a coordinated and synergised marketing mix**

- Organisational focus.
- Maximised synergy.
- Budget economies.
- Clear brand positioning.
- Competitive advantage.
- Online customer journeys.
- Offline customer journeys.



**D9 The marketing mix in different B2C and B2B contexts**

- Non-durable products (fast-moving consumer goods (FMCG)):
  - importance of price and place
  - mass promotion
  - recognising the customer and consumer.
- Durable products:
  - importance of service and guarantees/warranties
  - finance packages for purchase.
- Services:
  - importance of people, process and physical environment
  - service quality.
- Business to business (B2B):
  - importance of price and negotiation
  - personal selling and trade promotion
  - relationships and service.
- Not-for-profit:
  - importance of ideas and services
  - direct channels
  - opportunity cost
  - emphasis on public relations.
- Impact of digital technology across the mix:
  - instant communication
  - increased amounts of data
  - encouragement of innovation
  - broaden customer base
  - price transparency.

## Grade descriptors

To achieve a grade, learners are expected to demonstrate attributes across the essential content of the unit. The principle of best fit will apply in awarding grades.

### Level 3 Pass

Learners will be able to recall and apply knowledge of marketing to a range of given case study examples. They will have a sound understanding of key terms, methods, models and purposes related to marketing. They will be able to interpret information in order to select and apply knowledge of marketing, market research and all aspects of the marketing mix. They will be able to define and apply the processes associated with marketing and demonstrate appropriate applications to a range of different contexts. They will be able to relate knowledge of marketing to vocational and realistic situations and apply the use of marketing principles to planning for success.

### Level 3 Distinction

Learners will be able to synthesise knowledge of marketing and how it is used, bringing together skills in applying principles of marketing in complex situations and contexts. They will be able to analyse how businesses respond to changes in the market, assessing the impact on businesses and recommending appropriate actions. They will be able to explore and evaluate potential effects on businesses of marketing decisions and make valid recommendations. They can analyse and evaluate complex information and data, considering the implications appropriate to the context of the information given, and making appropriate justified recommendations and judgements using a range of models. They can demonstrate, through application, analysis and evaluation, the understanding of marketing concepts in a range of situations.

## Key words typically used in assessment

The following table shows the key words that will be used consistently by Pearson in our assessments to ensure learners are rewarded for demonstrating the necessary skills.

Please note: the list below will not necessarily be used in every paper/session and is provided for guidance only.

Command or term	Definition
Add/Label	Requires the addition of labelling to a stimulus material given in the question, for example labelling a diagram or adding units to a table.
Assess	Give careful consideration to all the factors or events that apply and identify which are the most important or relevant. Make a judgement on the importance of something and come to a conclusion where needed.
Complete	Provide the missing information for a table/diagram so that it is complete (contains all the necessary information).
Define	Give exactly the nature, scope or meaning of something.
Describe	Give an account of something. Linkage required in the form of context or process. Do not need to include a justification or reason.
Discuss	Consider the different aspects in detail of an issue, situation, problem or argument and how they interrelate.
Evaluate	Consider various aspects of a subject's qualities in relation to its context, such as strengths or weaknesses, advantages or disadvantages, pros or cons. Come to a judgement supported by evidence which will often be in the form of a conclusion.
Explain	Requires identification of a point and linked justification/expansion of that point.
Give/State/Name	Requires recall of one or more pieces of information.
Identify	Usually requires some key information to be selected from a given stimulus/resource.

## Links to other units

This unit links to:

- Unit 1: Careers in Marketing
- Unit 3: Customer Communications
- Unit 4: Applying Digital Marketing
- Unit 5: Branding Products and Services
- Unit 6: Generating Customer Loyalty
- Unit 10: Work Experience in Marketing
- Unit 12: Market Research for a Start-up Business.

## Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers
- organisation materials as exemplars
- support from local organisation staff as mentors
- visits to appropriate organisations.

# Unit 3: Customer Communications

Level: **3**

Unit type: **Internal**

Guided learning hours: **180**

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## Unit in brief

Learners develop and use customer communications to engage with customers.

## Unit introduction

Customer communications is a key component in the overall marketing strategy of an organisation. Different types of organisations use different forms of communication to reach their customers. Increasingly, they are implementing a range of communication techniques to achieve their end goal of boosting awareness or revenue.

In this unit, you will look at the processes involved in creating a successful customer communications plan. You will learn about different types of customer and how these customers make buying decisions. You will explore the purpose of marketing communications and the range of tools available. You will prepare a customer communications plan and measure the plan's effectiveness. To complete the assessment task in this unit, you will need to draw on your learning from across your programme.

This unit will help you to progress to employment in marketing agencies or in-house marketing departments. It will also help you to move on to further study in higher education or to professional qualifications related to marketing.

## Learning aims

In this unit you will:

- A** Explore segmentation, targeting and positioning and the influences on the customer decision-making process
- B** Investigate the customer communications process for a specific product or service
- C** Plan and create customer communications for a specific product or service
- D** Present customer communications for a specific product or service.

## Summary of unit

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Explore segmentation, targeting and positioning and the influences on the customer decision-making process	<b>A1</b> Different types of customer <b>A2</b> Purpose and methods of segmenting, targeting and positioning <b>A3</b> Customer decision-making process <b>A4</b> Influences on customer decision making	A report evaluating the influences involved in customer decision making and market segmentation.
<b>B</b> Investigate the customer communications process for a specific product or service	<b>B1</b> The customer communications process <b>B2</b> Factors involved in developing customer communications <b>B3</b> Customer communication mix tools <b>B4</b> Advantages and disadvantages of different customer communications tools	A customer communications plan that includes a portfolio of research and customer communications materials.
<b>C</b> Plan and create customer communications for a specific product or service	<b>C1</b> Customer communications plan <b>C2</b> Creating customer communications materials	
<b>D</b> Present customer communications for a specific product or service	<b>D1</b> Presenting a customer communications plan <b>D2</b> Measuring and evaluating the customer communications plan <b>D3</b> Tools for measuring the effectiveness of the customer communications plan	A presentation of the customer communications plan, accompanied by an evaluation of the communication materials.

## Content

### Learning aim A: Explore segmentation, targeting and positioning and the influences on the customer decision-making process

#### A1 Different types of customer

- Define the meaning of 'customers' in different contexts, e.g.:
  - customers
  - consumers
  - buyers
  - prospects
  - business to customer (B2C)
  - business to business (B2B)
  - not for profit (NFP).

#### A2 Purpose and methods of segmenting, targeting and positioning

- Segmentation: the categorisation of stakeholders into homogenous groups.
- Purpose of segmentation:
  - matching the right customer to the appropriate organisational strength so that marketing resources are used efficiently
  - to give a greater return on investment (ROI).
- Benefits of segmentation for customers:
  - belief that their needs, desires and beliefs are best satisfied
  - receive a tailored experience
  - improved experiences.
- Benefits of segmentation for organisations:
  - maximise sales
  - maximise profits
  - ability to advertise a unique selling benefit, therefore better brand management
  - customer loyalty
  - develop products at a lower cost due to resources delivering an increased return on investment
  - fewer advertising and promotion channels needed
  - lower promotion costs as messages can be repeated only in spaces where segmented customers will hear them
  - potentially fewer distribution channels
  - reduction of sales costs.
- Segmentation bases:
  - B2C
    - by type of customer, e.g. demographics – age, sex, income, education, industry, profession
    - by spending behaviour, e.g. how often people buy, how much they spend, when they buy
    - by social media usage, e.g. access to social data to customise campaigns based on interests, friends/followers to become brand advocates, education
  - B2B
    - by organisation type, size, purpose, budget capacity and job function
    - by organisation volume and regularity of purchases
    - by organisation products, services and client base
    - by organisation culture, ethos and innovative capacity
    - by organisation requirements and relationship
  - not-for-profit
    - by donor/member type
    - by fundraising capability.

- Targeting: concentrating marketing on one or a few key segments consisting of the customers whose needs most closely match the product or service offering.
- Purpose of targeting: to attract new business, increase sales and boost business success.
- Methods of targeting:
  - special discounts, rewards and priority access to new products
  - upsell relevant products and services to encourage more spending.
- Positioning: promoting a product or service to a particular market segment to fulfil specific requirements.
- Purpose of positioning: to determine the greatest opportunity exists to increase sales, provide value to customers by meeting customer needs and expectations, to concentrate efforts on what the company does particularly well in comparison with its competitors.
- Methods of positioning:
  - customer needs and perceptions
  - brand recognition
  - pricing
  - quality, convenience and customer service.

### **A3 Customer decision-making process**

- Stages in the customer's decision-making process:
  - need recognition
  - information gathering
  - evaluation of alternatives
  - purchase decision
  - post purchase review and evaluation
  - potential repeat purchase.
- Decision-making units (DMUs):
  - initiators
  - gatekeepers
  - buyers
  - deciders
  - users
  - influencers.
- Customer decision making in different contexts:
  - business to business (B2B)
  - business to customer (B2C)
  - not for profit (NFP).
- Generating customer loyalty.

### **A4 Influences on customer decision making**

- Influences on individual decision making:
  - purchasing power
  - group influence
  - personal preferences
  - economic conditions
  - marketing campaigns
  - scarcity.
- Influences on organisational decision making:
  - business objectives
  - budgets
  - culture
  - decision makers
  - attitude to risk
  - availability of data
  - external environment.



- Online influences on decision making:
  - products/service reviews
  - websites, e.g. ease of use, comfort, jargon-free, product updates
  - social pressure
  - exposure
  - social media following
  - after-sales services.
- Offline influences on decision making:
  - face-to-face conversation with salesperson
  - face-to-face conversation with family/friends
  - recommendations
  - social pressure
  - social norms and expectations
  - exposure
  - experiences
  - in-store ambience
  - emotional connections.

### **Learning aim B: Investigate the customer communications process for a specific product or service**

#### **B1 The customer communications process**

- Models and processes of customer communication:
  - AIDA – Attention, Interest, Desire, Action
  - DAGMAR – Defining Advertising Goals for Measured Advertising Results: Awareness, Comprehension, Conviction, Action
  - Lavidge and Steiner – awareness, knowledge, liking, preference, conviction, purchase
  - drip marketing – communicating information through a steady stream of marketing messages, including emails, social media posts, postcards, calls.
- Types of communication:
  - internal
  - external.

#### **B2 Factors involved in developing customer communications**

- Target audience.
- Objectives.
- Customer profiles and preferences.
- Internal influences on the organisation.
- External influences on the organisation.
- Marketing budget, resources and time.

#### **B3 Customer communication mix tools**

- Customer communications mix:
  - advertising
  - content marketing and influencers
  - public relations
  - sales promotion
  - direct marketing
  - events and sponsorship.
- Communication tools within the mix:
  - mass communications tools, e.g. web, app, TV, radio, newspaper, magazine
  - online communications tools, e.g. email, instant messaging, live chat, online forums, voice-over IP, video conferencing
  - offline communications tools, e.g. networking, speaking engagements, print publications, direct mail, cold calls, print advertising, associations and trade shows.

**B4 Advantages and disadvantages of different customer communications tools**

- Above-the-line approaches:
  - advantages – reach, attention, brand building
  - disadvantages – cost, outdated, effectiveness and return on investment (ROI).
- Below-the-line approaches:
  - advantages – builds customer relationships, lower investment, direct reach to customers, targeted promotion, cost-effective, easy to measure, better ROI, easy to adapt, instant conversion
  - disadvantages – targeting may be difficult, training requirements, deeper understanding of customers and clients needed, lack of trust, content of promotion needs to be localised.
- Online tools:
  - advantages – cost-effective, easy to connect all over the world, efficiency and productivity, competitive advantage, easy to map consumer behaviour
  - disadvantages – time-consuming, investments in software and hardware, lack of physical contact with customers.
- Offline tools:
  - advantages – choice, tangibility, tactility, interaction
  - disadvantages – not easily measured, costly, hard to establish yourself without online presence.

**Learning aim C: Plan and create customer communications for a specific product or service****C1 Customer communications plan**

- Objectives, e.g. brand awareness, increased sales, digital engagement, increased demand.
- Message.
- Rationale for the plan, the message and the communications mix.
- Segmentation, targeting and positioning.
- Target audience and their characteristics.
- Communications mix, including online and offline channels.
- Message: content and appeal, consistency and frequency, fit with customer and organisation.
- Media and coverage.
- Resources: physical, human and financial, technological.
- Constraints, risks and contingency planning: timescales, budget, ethics, competition.
- Measurables and evaluation criteria.

**C2 Creating customer communications materials**

- Process:
  - ideas development
  - visualisation
    - mock-up
    - example
    - prototype
  - testing and briefing (for internal design or an agency)
  - revision and refinement.
- Tools:
  - software – layout, design, image manipulation, writing
  - hardware – devices, tablet, PC, camera
  - traditional – sketches, collage, setup.

- Creating:
  - written materials
  - images
  - combinations of images and writing
  - use of brand guidelines.

### **Learning aim D: Present customer communications for a specific product or service**

#### **D1 Presenting a customer communications plan**

- Types of presentation:
  - internal and external
  - face to face
  - online
  - recorded.
- Presentation:
  - client's objectives
  - audience
  - content
  - structure
  - communication: verbal, non-verbal, technical terminology
  - timing
  - use of media, e.g. audio, video, audio, graphics, aids
  - support materials, e.g. handouts, extended version, full plan
  - script
  - presentation software
  - contingency planning.

#### **D2 Measuring and evaluating the customer communications plan**

- Using relevant data to measure effectiveness:
  - linking of effectiveness measure to objectives, e.g. engagement, sales, customer growth, customer interest, budget
  - cost of communications versus campaign/plan deliverables, i.e. key performance indicators, e.g. ROI.

#### **D3 Tools for measuring the effectiveness of the customer communications plan**

- Metrics for different channels:
  - online measurement, e.g. shares, likes
  - offline measurement, e.g. response rate, call tracking metrics
  - financial measures, e.g. return on investment, sales, leads
  - non-financial measures, e.g. brand awareness, website traffic, social media engagement, blog post visits, landing-page conversions.
- Evaluation:
  - customer focus and understanding
  - selection of communication mix
  - client needs
  - research
  - plan
  - message
  - production processes
  - communication materials
  - strengths
  - areas for development.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Explore segmentation, targeting and positioning and the influences on the customer decision-making process</b>		<b>A.D1</b> Evaluate methods of segmentation, targeting and positioning of different customer types and influences on their decision making.
<b>A.P1</b> Explain types of customer and methods of customer segmentation, targeting and positioning. <b>A.P2</b> Explain the influences on the customer decision-making process.	<b>A.M1</b> Analyse methods of segmentation, targeting and positioning of different customer types and influences on their decision making.	
<b>Learning aim B: Investigate the customer communications process for a specific product or service</b>		<b>BC.D2</b> Develop a thorough communications plan and materials with effective use of relevant tools and processes for a specific product or service.
<b>B.P3</b> Outline customer communications processes and development. <b>B.P4</b> Research customer communication tools for a specific product or service.	<b>B.M2</b> Compare relevant communications processes and tools for a specific product or service.	
<b>Learning aim C: Plan and create customer communications for a specific product or service</b>		
<b>C.P5</b> Develop a communications plan that meets set objectives and includes an appropriate message and communication mix. <b>C.P6</b> Develop communication materials that appropriately meet set objectives.	<b>C.M3</b> Develop a detailed communications plan and materials informed by detailed assessment of objectives.	
<b>Learning aim D: Present customer communications for a specific product or service</b>		<b>D.D3</b> Reflect on the effectiveness of the communications plan, materials and presentation using audience feedback, making justified recommendations for improvement.
<b>D.P7</b> Present a communications plan and materials to an audience using appropriate technical language and formatting. <b>D.P8</b> Reflect on the communications plan, materials and presentation suggesting improvements.	<b>D.M4</b> Present a communications plan and materials to an audience selecting and using effective methods and content. <b>D.M5</b> Reflect on the effectiveness of the communications plan, materials and presentation suggesting recommendations.	

## Essential information for assignments

The recommended structure of assessment is shown in the unit summary along with suitable forms of evidence. *Section 6 Internal assessment* gives information on setting assignments and there is further information on our website.

There is a maximum number of three summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aims: B and C (B.P3, B.P4, C.P5, C.P6, B.M2, C.M3, BC.D2)

Learning aim D: (D.P7, D.P8, D.M4, D.M5, D.D3)

## Further information for teachers and assessors

### Resource requirements

There are no special resources needed for this unit.

### Essential information for assessment decisions

#### Learning aim A

**For distinction standard,** learners will make insightful and perceptive observations of customer demographics, characteristics and segmentation, targeting and positioning, based on interpretation. They will apply customer segmentation, targeting and positioning methods confidently in the context of specific marketing objectives, making clear and relevant connections between customer decision-making processes and the influences that the contexts have on them.

**For merit standard,** learners will present the outcome of methodical and detailed examination of customer decision-making processes in different contexts, making informed connections between the influences within the contexts and customer choices. They will consider the varied types of customers and methods of segmentation, targeting and positioning, showing how they relate to the customer decision-making process.

**For pass standard,** learners will show clear details and give evidence of most types of customer and methods of customer segmentation, covering appropriate benefits of applying market segmentation, targeting and positioning. They will illustrate the stages of the customer decision-making process in general contexts and the influences on this.

#### Learning aims B and C

**For distinction standard,** learners will produce a thorough and sophisticated communications plan. The message will be well developed and the strategy for implementation will be perceptively informed by in-depth consideration of customer needs with clear objectives. They will develop sophisticated communication materials, based on an in-depth evaluation of the needs of their customers. Links to the selected product or service and the plan objectives will be detailed, justified and well developed.

**For merit standard,** learners will consider different opportunities for customer communication tools and processes within the context of the objectives, identifying the distinctions and defining the benefits within relevant contexts. They will use this to develop a secure and efficient communication plan, message and communication mix to meet objectives. They will develop effective communication materials linking to the needs of their customers and the objectives of the plan.

**For pass standard,** learners will provide an overview of the customer communication development process stages for internal and external communications. They will identify some of the key tools available for developing communications. They will develop a communication plan, with objectives and a message that are mostly relevant and logical. They will develop communication materials mostly in line with the plan using adequate creation methods.

## Learning aim D

**For distinction standard,** learners will present their communications plan, showing fluent communication skills. They will prioritise key information in a concise way, making sophisticated and logical connections between the message, communication mix and objectives, using presentation skills, including a professional tone, that are relevant to the circumstances. They will also present an appraisal of the plan, materials and presentation, with balanced and perceptive consideration of its effectiveness in relation to the comprehensive evaluation of objectives, measures and deliverables. The presentation will be objective. They will provide analytical and confident responses to questions from the audience, demonstrating in-depth knowledge and understanding of the communications plan and materials.

**For merit standard,** learners will present the breadth and scope of their communications plan, showing consistent and secure communication skills. They will give relevant insight into the development of the plan, with some justification demonstrating its efficiency and effectiveness. Learners will measure and evaluate their communications plan, materials and presentation using effective tools and metrics, making relevant suggestions for improvements to the plan. They will give appropriate responses to questions from the audience, demonstrating knowledge of the communications plan and materials.

**For pass standard,** learners will competently present a communications plan to an audience, covering most general details of the objectives, message and communication mix. They will use adequate presentation skills and will present information in a coherent format and structure. Learners will give a general reflection of the effectiveness of the plan, materials and presentation covering most parameters. Their responses to questions from the audience will be mostly appropriate.

## Links to other units

This unit links to:

- Unit 1: Careers in Marketing
- Unit 2: Marketing Principles
- Unit 5: Branding Products and Services
- Unit 6: Generating Customer Loyalty
- Unit 10: Work Experience in Marketing
- Unit 12: Market Research for a Start-up Business.

## Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers from marketing and communications agencies or in-house
- audience members in the form of marketing professionals.





# Unit 4: Applying Digital Marketing

Level: **3**

Unit type: **Internal**

Guided learning hours: **180**

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## Unit in brief

Learners explore the application of digital marketing in organisations and develop their own digital marketing campaign.

## Unit introduction

Digital marketing is used by organisations of all sizes, in all sectors and in all countries. Digital marketing has made it easier for organisations to instantly connect with customers, gain feedback from campaigns and adapt their products to meet customers' needs. Customers use digital marketing to discover new products, ask questions, make purchases and share content. As a result, customer behaviour has changed, using different tools such as social media, search engines, online platforms, websites and emails. This has altered the way in which customers interact with organisations, which must adopt digital marketing practices and adapt in order to stay ahead. This fast-moving environment has been facilitated by new technology and constant access to the internet, although traditional marketing remains valid as not all customers may have access to digital devices. This means that digital and traditional marketing campaigns should be integrated to ensure consistency.

In this unit, you will explore the principles of digital marketing practice. You will develop a digital marketing campaign for a specific organisation based on an assessment of its use of digital marketing. You will then review the effectiveness and potential contribution to the organisation. To complete the assessment task, you will need to draw on your learning from across your programme.

This unit will help you to progress to employment in the digital marketing industry. It will also help you to move on to further study in higher education or to professional qualifications related to marketing.

## Learning aims

In this unit you will:

- A** Explore the principles of digital marketing practice used in the marketing industry
- B** Explore the use of digital marketing in a specific product or service
- C** Develop a digital marketing campaign for a specific product or service
- D** Review the development and effectiveness of a digital marketing campaign.

## Summary of unit

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Explore the principles of digital marketing practice used in the marketing industry	<b>A1</b> Principles of digital marketing <b>A2</b> Digital technology and marketing tools	Case study on the digital marketing practice in a selected organisation, including the types of digital marketing technology and why they are used, with examples of feedback from customers on the impact on them.  Case study that investigates the use of digital marketing tools.
<b>B</b> Explore the use of digital marketing in a specific product or service	<b>B1</b> Digital marketing opportunities for organisations <b>B2</b> Advantages and disadvantages of digital marketing <b>B3</b> Comparison with competitors and their use of digital marketing	
<b>C</b> Develop a digital marketing campaign for a specific product or service	<b>C1</b> Planning a campaign <b>C2</b> Developing materials	A completed plan and associated materials.  A presentation of a digital marketing campaign that shows the types of digital content to be used by a selected organisation. The materials will be outlined in a content/marketing calendar.
<b>D</b> Review the development and effectiveness of a digital marketing campaign	<b>D1</b> Reviewing stages in planning digital marketing campaigns <b>D2</b> Reviewing the production of the campaign materials <b>D3</b> Measuring the effectiveness of digital marketing campaigns	

## Content

### Learning aim A: Explore the principles of digital marketing practice used in the marketing industry

#### A1 Principles of digital marketing

- Integration with traditional marketing.
- Contribution to organisation goals, e.g.:
  - opportunities
  - online visibility
  - improving customer acquisition costs, and revenue
  - use of metrics, e.g. opens, shares and time on page.
- 7Ps: product, price, place, promotion, people, physical evidence and processes.
- Agile delivery:
  - what customers want and what competitors are doing change constantly
  - personalising delivery of the right message to the right people at the right time.
- Factors driving customer behaviour, e.g.:
  - improved technology
  - widespread access to the internet
  - cost to access.
- Legal and ethical issues in digital marketing, e.g.:
  - General Data Protection Regulations (GDPR)
  - safeguarding data
  - electronic communications regulations
  - deceptive marketing practices
  - accessibility.

#### A2 Digital technology and marketing tools

- Digital marketing technology, e.g.:
  - computers
  - mobile phones
  - tablets
  - wearable computing, such as smart watches, wearable cameras
  - apps
  - WiFi
  - instant data
  - Internet of Things (IoT)
  - automation
  - analytics
  - changes in organisation practice.
- Digital marketing toolbox e.g.:
  - social media marketing
    - online communities
    - online interaction, such as messaging, chat now
    - stories, live video
  - search engine optimisation (SEO)
    - organic search results
    - keyword analysis

- search marketing (SEM)
  - pay per click (PPC)
  - online advertising, such as display adverts on websites
  - affiliate marketing
  - referrals
  - digital display advertising
- online marketing platforms, such as:
  - auction sites, comparison websites, intermediary websites, crowdfunding websites, review platforms, crowdsourcing websites
- website marketing
  - ecommerce and organisation websites
  - blogs, vlogs
  - dynamic content
  - pop-ups
  - live chat
- email marketing
  - email newsletters.

### **Learning aim B: Explore the use of digital marketing for a specific product or service**

#### **B1 Digital marketing opportunities for organisations**

- Acquiring new customers.
- Moving into new markets.
- Generating sales.
- New product development, e.g.:
  - generating new product ideas online
  - insights by monitoring online data.
- Launching new products.
- Customer segmentation, e.g. based on interests and behaviour.
- Brand awareness and management.
- Customer service.
- Adapting to customer behaviour, e.g.:
  - showrooming – where customers look in store but buy online
  - webrooming – where customers look online but buy in store
  - using intermediaries, e.g. third-party portals to access the goods or services
  - online research, e.g. searching for the organisation, looking at staff profiles online, checking online activity
  - increased consumer power, e.g.
    - online campaigns
    - reviews and comments
    - online complaining
    - social media campaign groups.

#### **B2 Advantages and disadvantages of digital marketing**

- Assessment of factors affecting the digital marketing approach:
  - human resources
  - cost
  - time
  - materials and resources, e.g. software and hardware
  - opportunities for automation
  - audience reach
  - response mechanisms
  - legal and ethical considerations.

**B3 Comparison with competitors and their use of digital marketing**

- Market research into the sector and current digital trends, e.g.:
  - changes to the sector
  - trending keywords
  - topical themes.
- Reviewing competitors online, e.g.:
  - product offers online
  - pricing transparency
  - promotional tools used
  - physical evidence, such as forms, downloads
  - online processes available, such as live chat, product comparisons, wish lists.

**Learning aim C: Develop a digital marketing campaign for a specific product or service****C1 Planning a campaign**

- Objectives for campaign success.
- Audiences and their digital marketing content needs and preferences.
- Types of campaigns, e.g.:
  - email campaign to encourage downloads
  - mini website for a new product
  - pop-ups for an existing website to encourage conversion
  - blog articles about new products, the organisation's background
  - organic social media campaigns
  - social media advertising
  - online advertising
  - stories to increase fans or followers.
- Resources required in developing digital marketing content, e.g.:
  - budget required
  - people involved
  - time in uploading content
  - tools to schedule content
  - monitoring feedback.

**C2 Developing materials**

- Processes in producing the digital marketing campaign, e.g.:
  - timing
  - resources: financial, physical, human
  - developing campaign materials
    - software
    - hardware
    - design
    - image/video manipulation and editing
    - sourcing content
    - identifying, organising and creating required materials
    - refining materials, e.g. adding other details, reducing file size, optimising for different platforms
    - exporting and compression
  - creating content calendar
    - timescale required
    - digital marketing tools used
    - when content is posted
    - how content is posted (manually, automated)
  - testing (A/B, multivariate).

- Digital marketing content formats:
  - messages
  - words for blog posts
  - website copy
  - images
  - GIFs
  - video.
- The role of customers in content creation and user-generated content, e.g.:
  - product reviews
  - feedback online
  - unboxing videos
  - testimonials.

## **Learning aim D: Review the development and effectiveness of a digital marketing campaign**

### **D1 Reviewing stages in planning digital marketing campaigns**

- Reflection on the stages of the digital marketing campaign:
  - design and production stages
  - criteria
    - marketing objectives
    - target audience
    - management
    - efficiency
    - comparison with competitors
    - use of technology
    - content
    - messaging
    - timing
    - budget
    - testing.

### **D2 Reviewing the production of the campaign materials**

- Campaign materials, e.g.:
  - ease or challenges with creating materials
  - clarity of message
  - relevance of message to media
  - any issues with third-party resources
  - timing.

### **D3 Measuring the effectiveness of digital marketing campaigns**

- Purpose of measuring campaigns.
- Types of measurement available for digital marketing communication campaigns, e.g.:
  - number of likes
  - engagement
  - shares
  - click-throughs
  - subscribers
  - downloads
  - sales.
- Methods of sharing the results, e.g.:
  - dashboards
  - reports
  - summaries
  - presentations.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Explore the principles of digital marketing practice used in the marketing industry</b>		<b>AB.D1</b> Analyse the digital marketing used for a specific product or service, making justified recommendations for improvement.
<b>A.P1</b> Explain the principles of digital marketing practice. <b>A.P2</b> Explain the digital marketing tools used in the marketing industry.	<b>A.M1</b> Assess how digital marketing tools have changed marketing practice.	
<b>Learning aim B: Explore the use of digital marketing for a specific product or service</b>		
<b>B.P3</b> Explain the advantages and disadvantages of digital marketing for a specific product or service. <b>B.P4</b> Explain the use of digital marketing for a competitor's product or service.	<b>B.M2</b> Compare the digital marketing of a specific product or service with that of a competitor.	
<b>Learning aim C: Develop a digital marketing campaign for a specific product or service</b>		<b>CD.D2</b> Create a detailed digital marketing campaign with a proficient use of technology, and a reflection to recommend methods to overcome challenges and improve future digital marketing materials.
<b>C.P5</b> Plan a digital marketing campaign and content calendar for a specific product or service. <b>C.P6</b> Create materials using digital marketing tools for a specific product or service.	<b>C.M3</b> Create a realistic digital marketing campaign, using a range of digital marketing tools and a sustained content calendar that meets objectives.	
<b>Learning aim D: Review the development and effectiveness of a digital marketing campaign</b>		
<b>D.P7</b> Review the challenges of the stages in the digital marketing campaign. <b>D.P8</b> Gather feedback on the effectiveness of the digital marketing materials.	<b>D.M4</b> Assess the impact that the challenges present on the effectiveness of the digital marketing materials taking feedback into account.	

## Essential information for assignments

The recommended structure of assessment is shown in the unit summary along with suitable forms of evidence. *Section 6 Internal assessment* gives information on setting assignments and there is further information on our website.

There is a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aims: A and B (A.P1, A.P2, B.P2, B.P3, B.P4, A.M1, B.M2, AB.D1)

Learning aims: C and D (C.P5, C.P6, D.P7, D.P8, C.M3, D.M4, CD.D2)



## Further information for teachers and assessors

### Resource requirements

For this unit, learners will need access to current marketing information and to software and hardware for developing digital marketing materials.

### Essential information for assessment decisions

#### Learning aims A and B

**For distinction standard,** learners will present a detailed examination of the principles of digital marketing practice and the integration with traditional marketing. They will analyse digital elements of the 7Ps and agile delivery. They will draw valid conclusions to justify the factors driving customer behaviour and the impact of legal and ethical issues. They will also justify recommendations for the use of digital technology and tools and the use of digital marketing. They will make relevant comparisons between competitors and justify recommendations for improvement.

**For merit standard,** learners will present a careful consideration of the principles of digital marketing practice, the integration with traditional marketing, the 7Ps and agile delivery. They will explain the factors driving customer behaviour and the impact of legal and ethical issues. They will also assess digital technology and tools and review the use of digital marketing, making relevant comparisons between competitors.

**For pass standard,** learners will show clear details of the principles of digital marketing practice, the integration with traditional marketing, the 7Ps and agile delivery, factors driving customer behaviour, and the legal and ethical issues. They will also outline digital technology and tools and the use of digital marketing.

#### Learning aims C and D

**For distinction standard,** learners will plan a detailed and well-developed digital marketing campaign. The plan will contain full coverage of the objectives, the audience and resources. Learners will create thorough materials, including a content calendar showing comprehensive planned activity to meet the objectives of the plan. They will evaluate the stages in digital marketing campaigns and reflect on the challenges in the process in order to recommend justified improvements. They will gather thorough feedback on the digital marketing materials and recommend improvements for future campaigns and materials.

**For merit standard,** learners will plan a realistic digital marketing campaign and develop relevant materials. The plan will contain many of the objectives, the audience and resources but may be missing some elements. Learners will include a content calendar showing the planned activity to meet the objectives of the plan. They will review the stages in digital marketing campaigns to reflect on the challenges in the process as well as gathering relevant feedback on the digital marketing materials and assessing the product of the materials.

**For pass standard,** learners will plan a digital marketing campaign and develop materials. The plan will contain some of the objectives, the audience and the resources but will give them only brief consideration. It will meet basic but adequate needs of the campaign. Learners will include a content calendar, mostly in line with the plan. They will review the stages in digital marketing campaigns to reflect on the challenges in the process as well as gather appropriate feedback on the digital marketing materials.

### **Links to other units**

This unit links to:

- Unit 1: Careers in Marketing
- Unit 2: Marketing Principles
- Unit 5: Branding Products and Services
- Unit 6: Generating Customer Loyalty
- Unit 10: Work Experience in Marketing
- Unit 11: Influencer Marketing.

### **Employer involvement**

This unit would benefit from employer involvement in the form of:

- guest speakers
- visits to appropriate organisations
- work experience
- organisational materials as exemplars.

# Unit 5: Branding Products and Services

Level: **3**

Unit type: **Internal**

Guided learning hours: **60**

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## Unit in brief

Learners will investigate the role of branding and how it is used. They will give recommendations for changes to a brand for a selected product or service.

## Unit introduction

Brands surround us in our everyday lives. People may judge others by their brand of car, their brand of clothes or the brand of drinks they consume. Brands can help give people identity and image. Because of this, marketing is often brand driven, with the objective of establishing a product or service with a separate identity in consumers' minds, making the product or service desirable, wanted and even needed. Messages are carefully crafted to build customer views and expectations of the products or services associated with the brand. Constant advances in digital-based processes and systems, and changes in customer behaviour and use of social media, present a challenge for organisations which work to maintain, develop or reinforce their brand identity. Organisations invest a huge amount of effort and resources to ensure that the customer recognises and responds to their brand identity in the right way.

In this unit, you will consider the ways in which organisations use branding to achieve their marketing objectives and organisation aims. You will explore the ways in which branding influences the marketing mix and how brand-strategy recommendations are developed according to market needs.

This unit will support you in continuing your studies of branding through a marketing-related degree or a professional qualification. The unit will also give you the skills to progress to employment in a branding-related role.

## Learning aims

In this unit you will:

- A** Investigate the role of branding in a selected organisation
- B** Review how branding is used by a selected organisation
- C** Recommend improvements to a brand for an existing product or service.

## Summary of unit

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Investigate the role of branding in a selected organisation	<b>A1</b> Principles of branding <b>A2</b> Brand as an asset <b>A3</b> Benefits and limitations of branding	A report evaluating the impact of branding in a selected organisation.
<b>B</b> Review how branding is used by a selected organisation	<b>B1</b> Branding as part of organisation strategy <b>B2</b> Brand design <b>B3</b> Factors influencing branding activities	A report on the extent to which the branding of a product or service meets the aim(s) of the selected large organisation, including recommendations on changes to be made to a brand in response to a brand audit.
<b>C</b> Recommend improvements to a brand for an existing product or service	<b>C1</b> Challenges of managing brands <b>C2</b> Improving a brand	

## Content

### Learning aim A: Investigate the role of branding in a selected organisation

#### A1 Principles of branding

- Product or service.
- Branding: the elements that define the image, ethos and tone of an organisation and its products or services.
- Brand: a characteristic name, symbol or shape that distinguishes a product or service from that of another supplier.
- Brand portfolio: a collection of brands under the control of an organisation.
- Types of brand:
  - organisation name, such as manufacturers and retailers
  - product and product ranges, such as cars or drinks
  - person, such as a celebrity, actor, singer or entrepreneur.
- Use of branding:
  - new brands
  - brand extensions
  - sub-brands
  - product extension.
- Target audiences for brands.
- Consumer feelings about and connections with a brand:
  - brand awareness and recognition of the brand
  - perceived qualities associated with the brand
  - loyalty to the brand.
- Customer loyalty ladder:
  - suspects to prospects
  - prospects to customers
  - customers to clients
  - clients to advocates.
- Branding as part of the marketing mix.

#### A2 Brand as an asset

- Value of a brand: the total financial value of a brand.
- Brand equity (positive and negative): the differential effect that knowing the brand name has on a customer's response to the product or service and its marketing, the value of your brand beyond physical assets.
- Customer equity: the value of customer relationships that a brand creates.
- Protecting the brand: legal issues – trademark registration, copyright, patent registration/IP (intellectual property).

#### A3 Benefits and limitations of branding

- Benefits of strong branding:
  - differentiates the product or service from the competition
  - increases customer engagement
  - increases customer loyalty and customer advocates
  - can command premium prices/higher prices than non-branded products or services
  - reduces price sensitivity
  - increases value of the organisation
  - makes consumer choice and recognition of products or services easier
  - strong brand awareness leads to high sales and high market share
  - retailers and service sellers are more likely to stock top-selling brands than less well-known brands

- brand portfolios allow organisations to compete in many different marketplaces with a range of product lines or services.
- Limitations of branding:
  - may take years to build a brand
  - high cost of promotion, keeping brand in the customers' eyes
  - loss of brand value for one product or service can affect a range of similar products or services
  - brands invite competition and copycats
  - high cost of research and development in ensuring brand continues to develop and lead the market.

## **Learning aim B: Review how branding is used by a selected organisation**

### **B1 Branding as part of organisation strategy**

- Brand strategy:
  - a long-term plan for the development of a successful brand in order to achieve specific goals
  - aligns with organisation aims and objectives for the product or service
  - influences the marketing strategy of an organisation.

### **B2 Brand design**

- Brand values: reflecting the core values and culture of the organisation and its employees.
- Brand personality and voice.
- Brand identity.
- Brand names: descriptive, evocative, inventive, geographical, acronym, founder, lexical.
- Brand elements:
  - intangibles – promise, personality, positioning and emotion
  - tangibles – identifying symbols, e.g. logos, graphics, colours, and sounds, e.g. music, jingles, voice.
- Using packaging to communicate a brand.
- Touchpoints – any place where consumers encounter a brand, such as:
  - advertising
  - organisation vehicles and livery used
  - company clothing, e.g. uniforms
  - signage and logos
  - branded mobile apps
  - content marketing, to include web landing pages, blogging, videos, podcasts, email, social media sites and communities
  - staff.

### **B3 Factors influencing branding activities**

- Internal influences:
  - size of the organisation
  - stage of the organisation – start-up, growth, decline
  - type of product or service
  - geographical location of organisation
  - budget for branding.
- External influences:
  - competition from other organisations
  - social pressure and conventions relating to the product or service
  - political climate
  - advances in technology and scope of digital platforms available
  - digital impact of customers communicating positively and negatively about the brand.

## **Learning aim C: Recommend improvements to a brand for an existing product or service**

### **C1 Challenges of managing brands**

- Brand management: analysis and planning of how a brand is perceived in the market, brand success and brand failure.
- Maintaining branding relationship with customers throughout the product or service life cycle.

### **C2 Improving a brand**

- Brand audit – a formal assessment of a brand’s strengths and weaknesses, to include:
  - existing marketing strategies, materials and communications
  - the customer perception of brand through primary and secondary data, such as questionnaires, focus groups, customer satisfaction surveys, sales and revenue data, blogs
  - comparison with competitors’ brands for similar products or services.
- Changing the perceptions of a brand:
  - re-branding
  - brand refreshing
  - brand relaunching.
- Reasons for changing a brand:
  - change in organisation focus
  - changes in the market
  - trends
  - changes in customer behaviour, values and needs
  - competitors branding strategies
  - technological and digital impact.
- Changes in branding and promotion to reflect social trends:
  - viral marketing – encouraging consumers to share information about products or services via the internet
  - social media sites – used to show benefits and features of products or services to differentiate from the competition
  - emotional branding – creating a bond between the consumer and the product or service by creating an emotional response to the advertising.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Investigate the role of branding in a selected organisation</b>		<b>A.D1</b> Evaluate the impact of branding on a selected organisation, making a judgement on its significance.
<b>A.P1</b> Explain the principles of branding for a selected organisation. <b>A.P2</b> Explain how brands can be an asset to a selected organisation.	<b>A.M1</b> Analyse the advantages and disadvantages of branding to a selected organisation.	
<b>Learning aim B: Review how branding is used by a selected organisation</b>		<b>B.D2</b> Evaluate the extent to which the branding of a product or service meets the aim(s) of a selected large organisation.
<b>B.P3</b> Explain the reasons for a selected large organisation to have a brand strategy. <b>B.P4</b> Explain the branding of contrasting products or services in a selected large organisation.	<b>B.M2</b> Analyse the potential impact of internal and external factors on branding activities of a product or service.	
<b>Learning aim C: Recommend improvements to a brand for an existing product or service</b>		<b>C.D3</b> Justify suggested changes to an existing brand for a product or service.
<b>C.P5</b> Explain the challenges of managing an existing brand for a product or service. <b>C.P6</b> Explain an existing brand for a product or service using a brand audit.	<b>C.M3</b> Analyse the reasons why an existing brand for a product or service may need to change.	



## Essential information for assignments

The recommended structure of assessment is shown in the unit summary along with suitable forms of evidence. *Section 6 Internal assessment* gives information on setting assignments and there is further information on our website.

There is a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aims: B and C (B.P3, B.P4, C.P5, C.P6, B.M2, C.M3, B.D2, C.D3)

## Further information for teachers and assessors

### Resource requirements

For this unit, learners will need access to a range of current branding information.

### Essential information for assessment decisions

#### Learning aim A

Learners will carry out an investigation into an organisation that has a reputation for strong brands. They must ensure that they select an organisation that will give them the depth of information required to fully cover all the assessment criteria. The choice of organisation will be individual and not tutor led.

**For distinction standard,** learners will draw on varied information, considering the relevance or significance of the branding used by an organisation. They will use their results to make reasoned judgements. They will come to a supported conclusion on the impact of branding. They will show understanding of the link between branding and achieving the aims and objectives, such as an increase or improvement in market share or improved competitive advantage.

**For merit standard,** learners will present a methodical and detailed examination of the branding and its application used by an organisation. They will present the outcome of their analysis by detailing the advantages and disadvantages of branding to the organisation, including an explanation of how brands can be an asset.

For pass standard, learners will show clear details of the principles of branding in a selected organisation and give reasons as to why brands can be an asset.

#### Learning aims B and C

Learners will continue their investigation into the organisation chosen for learning aim A.

**For distinction standard,** learners will draw on varied information for the relevance of the organisation's brand strategy. They will look in more depth at the branding of one of the two contrasting products or services investigated and explain the challenges of managing this brand and the potential impact of internal and external factors on the branding activities for the product or service. They will evaluate the extent to which branding of this product or service meets the aim(s) of the organisation. With a view to improving the brand, they will carry out a brand audit to inform an analysis of reasons to change the brand, justifying all recommended changes.

**For merit standard,** learners will present a methodical and detailed examination of the reasons for the organisation having a brand strategy. They will look in more depth at the branding of one of the two contrasting products or services investigated and explain the challenges of managing this brand and the potential impact of internal and external factors on the branding activities for the product or service. Using a brand audit, they will analyse the reasons for changing the brand.

**For pass standard,** learners will give reasons for the organisation having a brand strategy and use examples to explain the branding of two of its contrasting products or services. They will choose one of these contrasting products or services and explain the challenges of managing the brand. They will use primary and secondary research to carry out a brand audit on the product or service, including the existing marketing strategies, materials and communications, the customer perception of the brand, and a comparison with competitors' brands for similar products or services.

## Links to other units

This unit links to:

- Unit 1: Careers in Marketing
- Unit 2: Marketing Principles
- Unit 3: Customer Communications
- Unit 4: Applying Digital Marketing
- Unit 6: Generating Customer Loyalty
- Unit 8: Customer Immersion Experiences
- Unit 9: Activating a Brand
- Unit 10: Work Experience in Marketing
- Unit 11: Influencer Marketing
- Unit 12: Market Research for a Start-up Business.

## Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers and interview/discussion opportunities
- work experience
- opportunities to visit suitable organisations
- support from a local organisations staff as mentors
- provision of an organisations materials as exemplars
- ideas and suggestions to contribute to unit assessment.



# Unit 6: Generating Customer Loyalty

Level: **3**

Unit type: **Internal**

Guided learning hours: **60**

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## Unit in brief

Learners explore the purposes and benefits of generating customer loyalty and the methods used by a selected organisation to attract and retain customers.

## Unit introduction

Generating customer loyalty puts the customer and customer retention at the centre of the organisation, ahead of its products and services. Organisations engage in generating customer loyalty to continually attract repeat business. Strategies are designed to increase loyalty, interaction, communication and long-term engagement by providing information directly suited to customer needs and interests.

You will learn how generating customer loyalty attempts to keep customers engaged by providing marketing information and responses to enquiries, and promoting and selling additional products and services. In this unit, you will focus on how technology supports and facilitates this as organisations build databases of customer details that they then use to create loyalty and tailored relationships with individual customers. Similarly, you will look at how social media offers a direct and instant way for organisations and customers to communicate with each other. You will explore how effective generation of loyalty results in customers who continue to buy goods and services, satisfying their needs and helping organisations meet their objectives.

This unit will support you in continuing your study of generating customer loyalty through a marketing-related degree or a professional qualification. It will also give you the skills to progress to employment in this area.

## Learning aims

In this unit you will:

- A** Examine the purposes and benefits to a selected organisation of generating customer loyalty
- B** Investigate the information required to implement customer loyalty strategies
- C** Review the methods of generating customer loyalty in a selected organisation.

## Summary of unit

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Examine the purposes and benefits to a selected organisation of generating customer loyalty	<b>A1</b> Purposes of customer loyalty strategies <b>A2</b> Organisation benefits <b>A3</b> Customer benefits	A report evaluating the purposes of generating customer loyalty and the benefits to a selected organisation and its customers.
<b>B</b> Investigate the information required to implement customer loyalty strategies	<b>B1</b> Gathering and using customer loyalty information <b>B2</b> Implementing relationship marketing strategies <b>B3</b> Customer loyalty strategies and the marketing mix	A report evaluating the importance of gathering and using customer information in order to develop and implement the successful customer loyalty strategies in a selected organisation, and the effectiveness of these methods in terms of customer loyalty and purchasing behaviour.
<b>C</b> Review the methods of generating customer loyalty in a selected organisation	<b>C1</b> Key factors of generating loyalty <b>C2</b> Attracting and retaining customers using financial and non-financial methods <b>C3</b> Performance measurement	

## Content

### Learning aim A: Examine the purposes and benefits to a selected organisation of generating customer loyalty

Learners will understand the purpose of generating customer loyalty and how it can benefit both the organisation and the customer.

#### A1 Purposes of customer loyalty strategies

- Difference between transactional marketing and generating customer loyalty:
  - transactional marketing focuses on obtaining new customers, with little emphasis on customer service
  - generating customer loyalty focuses on customer retention, with a high emphasis on customer service.
- Generating customer loyalty:
  - is part of the marketing plan of an organisation
  - makes a bridge between the buyer and the seller
  - emphasises customer retention, satisfaction and lifetime customer value
  - markets to current customers rather than acquiring customers through sales and advertising
  - builds brand awareness and positions brand as the customer's best option
  - facilitates two-way conversations with customers
  - tailors marketing activities to customers' needs and interests using digital and social networks
  - contributes to the achievement of marketing objectives such as an increase in market share, repeat sales, satisfaction ratings, revenue growth and brand recognition.

#### A2 Organisation benefits

- Retains long-term customers and improves repeat sales.
- Improves ability to cross-sell.
- Builds better client relationships.
- Builds brand loyalty and trust.
- Increases the likelihood of referrals.
- Improves reputation.
- Adds/attracts new customers.
- Profiles customer, which supports targeted marketing and increases sales.
- Reduces costs by restricting:
  - customer loss/customer turnover/churn
  - negative customer perceptions that affect future sales
  - reputational damage.
- Adds value to the customer relationship by developing further revenue-generating opportunities.
- Supports organisational objectives such as an increase/improvement in market share, quality of service to existing customers and competitive advantage.

#### A3 Customer benefits

- Needs are better understood.
- Provides preferential treatment and premium products and services.
- Targets the marketing of products and services.
- Offers financial and non-financial rewards.

## **Learning aim B: Investigate the information required to implement customer loyalty strategies**

Learners will understand the importance of gathering and analysing customer data to inform customer loyalty strategies.

### **B1 Gathering and using customer loyalty information**

- Customer databases.
- Data mining to analyse information for marketing purposes.
- Customer profiling and categorisation.
- Segmenting the market:
  - macro – dividing the market into groups of consumers that share one or more common characteristics
  - micro – grouping consumers into very specific audiences within various niche markets.
- Behavioural patterns and associations.
- Behaviour prediction.
- Transaction tracking and follow through.
- Customer defection.
- Identifying and removing unprofitable/unwanted customers.

### **B2 Implementing relationship marketing strategies**

- Building a customer-centric culture.
- Providing communication:
  - digital media such as email, digital messaging, mobile apps, push notifications, social media, real-time social software, chipped data carriers (loyalty cards, payment cards), data terminals, point-of-sale (PoS) terminals, contactless systems, use of cookies
  - print-based media
  - telephone based, to include fixed line and mobile
  - scripts and machine learning.
- Use of house style.
- Providing web pages with personalised information such as login, transaction history, browsing history, preferences, wish lists, order tracking.
- Gathering customer feedback through satisfaction surveys and rating tools.

### **B3 Customer loyalty strategies and the marketing mix**

- Product: using mined data to customise products according to customer wishes.
- Price: 'made-to-measure' prices for customers.
- Place: offering a wide range of possibilities for the customer to get the product.
- Promotion: individual communication with customers.
- People: personal touch points with customers.
- Physical evidence: offline and online customer journey.
- Processes: simplicity of access to product or service.



### **Learning aim C: Review the methods of generating customer loyalty in a selected organisation**

Learners will understand the key factors of generating customer loyalty, and the advantages and disadvantages of using financial and non-financial methods to attract and retain customers.

#### **C1 Key factors of generating customer loyalty**

- Provides customer satisfaction.
- Ensures high standards of customer service.
- Develops segmentation techniques to focus on the right customer.

#### **C2 Attracting and retaining customers using financial and non-financial methods**

- Financial methods:
  - bonuses such as cash rewards and vouchers
  - discounts and reductions.
- Non-financial methods:
  - loyalty/reward programmes such as store points, frequent user credits, clubs with regular and tiered memberships, subscriptions, fostering positive relationships
  - additional products and services such as airline lounges, tailored products and customised services
  - preferential services such as previews, special events, gifts, offers, coupons, priority booking, upgrades
  - live-in marketing: consumers use products and services for free before making a purchase
  - helplines and named points of contact
  - 'nudge' marketing with mobile communication systems such as check-in reminders, availability of ancillary products and services, proximity of products and services
  - social media such as building an engaged community, social proofing
  - response speeds such as use of QR codes, order confirmation, order tracking.
- Relationship costs: the costs involved in setting up and maintaining relationships.

#### **C3 Performance measurement**

- Setting standards for customer loyalty activities:
  - service levels
  - quality standards
  - customer charters.
- Loyalty profitability: the value outcome from the generation of loyalty.
- Lifetime value: the value of customers' purchasing over the lifetime of relationship.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Examine the purposes and benefits to a selected organisation of generating customer loyalty</b>		<b>A.D1</b> Evaluate the extent to which generating customer loyalty can contribute to the achievement of the organisational objectives of a selected organisation.
<b>A.P1</b> Explain the purposes of customer loyalty strategies. <b>A.P2</b> Explain how generating customer loyalty benefits an organisation and its customers.	<b>A.M1</b> Analyse the importance of generating customer loyalty to a selected organisation in achieving its organisational objectives.	
<b>Learning aim B: Investigate the information required to implement customer loyalty strategies</b>		<b>B.D2</b> Evaluate the importance of customer information to the development and implementation of customer loyalty strategies.
<b>B.P3</b> Explain the types of information used by a selected organisation to generate customer loyalty. <b>B.P4</b> Explain the impact of generating customer loyalty on the marketing mix of a selected organisation.	<b>B.M2</b> Analyse the use of customer loyalty information in developing customer relationships and establishing loyalty in a selected organisation.	
<b>Learning aim C: Review the methods of generating customer loyalty in a selected organisation</b>		<b>C.D3</b> Evaluate the effectiveness of customer loyalty methods in a selected organisation and their effect on loyalty and purchasing behaviour.
<b>C.P5</b> Explain the key factors in generating customer loyalty and the financial and non-financial methods <b>C.P6</b> Explain how organisations can judge the effectiveness of generating customer loyalty methods.	<b>C.M3</b> Analyse the financial and non-financial methods of generating customer loyalty of a selected organisation in achieving its organisational objectives.	

## Essential information for assignments

The recommended structure of assessment is shown in the unit summary along with suitable forms of evidence. *Section 6 Internal assessment* gives information on setting assignments and there is further information on our website.

There is a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aims: B and C (B.P3, B.P4, C.P5, C.P6, B.M2, C.M3, B.D2, C.D3)

## Further information for teachers and assessors

### Resource requirements

There are no specific additional requirements for this unit, but centres must give learners access to information on a range of organisations and their relationship marketing activities.

### Essential information for assessment decisions

#### Learning aim A

For learning aim A, learners must ensure that they select an organisation that gives them the necessary depth of information on generating customer loyalty. The choice of organisation will be individual and not teacher led. To ensure the material they require is available, learners could research a few organisations before they select one for study.

**For distinction standard,** learners will draw on varied information about the impact that generating customer loyalty has on a selected organisation. To support their conclusion, they should use this information to make reasoned judgements on the extent to which generating customer loyalty can contribute to the achievement of the organisational objectives.

**For merit standard,** learners will present a clear understanding of the purpose of generating customer loyalty, including the difference between transactional and customer loyalty marketing, the benefits to the organisation of engaging in relationship marketing, and the achievement of organisational objectives and how these benefit customers.

**For pass standard,** learners will show clear details and give reasons and evidence to support their view on the purpose of customer loyalty strategies, the benefits to the organisation of engaging in relationship marketing and how this benefits customers.

#### Learning aims B and C

Learners will continue their study of the organisation chosen for learning aim A.

**For distinction standard,** learners will draw on varied information to consider how a selected organisation gathers and uses customer loyalty information and implements customer loyalty marketing strategies and the marketing mix. They will give a supported judgement on the key factors of generating customer loyalty and the advantages and disadvantages of using financial and non-financial methods to attract and retain customers to the selected organisation in meeting its objectives.

**For merit standard,** learners will present the outcome of a methodical and detailed examination on how a selected organisation gathers and uses customer loyalty information and implements customer loyalty strategies and the marketing mix. They will also interpret key factors of generating customer loyalty and the advantages and disadvantages of using financial and non-financial methods to attract and retain customers to the selected organisation in meeting its objectives.

**For pass standard,** learners will give reasons to support their view on how a selected organisation gathers and uses customer loyalty information and the marketing mix. They will give evidence of the key factors of generating customer loyalty and make judgements on methods of generating customer loyalty used by a selected organisation.

## Links to other units

This unit links to:

- Unit 1: Careers in Marketing
- Unit 2: Marketing Principles
- Unit 3: Customer Communications
- Unit 4: Applying Digital Marketing
- Unit 5: Branding Products and Services
- Unit 8: Customer Immersion Experiences
- Unit 9: Activating a Brand
- Unit 10: Work Experience in Marketing
- Unit 11: Influencer Marketing
- Unit 12: Market Research for a Start-up Business.

## Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers and interview/discussion opportunities
- work experience
- opportunities to visit suitable organisations
- support from a local organisations staff as mentors
- provision of an organisations materials as exemplars
- ideas and suggestions to contribute to unit assessment.



# Unit 7: Marketing an Event

Level: **3**

Unit type: **Internal**

Guided learning hours: **120**

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## Unit in brief

Learners plan, design and implement a promotional campaign for a selected event and evaluate its success.

## Unit introduction

The success and outcomes of events rely heavily on the creativity and innovation of marketing materials and promotional methods to capture the trends, needs and excitement of audiences through the combination of traditional and digital methods. Organisations that implement a cohesive, engaging and innovative marketing campaign are more likely to achieve their goals, increase attendance and demonstrate sustainability.

In this unit, you will investigate how different types of marketing are used for events. Using your findings, you will creatively develop and implement a marketing campaign and materials for a selected event. You will then develop the skills to evaluate the success of the event marketing campaign, making suggestions on how this could be improved. To complete the assessment task, you will need to draw on your learning from across your programme.

This unit will help you to progress to employment in marketing and events management roles. It will also help you to move on to further study in higher education and to professional qualifications related to marketing, promotion and events management.

## Learning aims

In this unit you will:

- A** Explore how organisations use promotion to successfully market events
- B** Develop a marketing campaign to promote an event
- C** Market and promote an event for a given audience
- D** Evaluate the success of the marketing campaign in meeting objectives.

## Summary of unit

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Explore how organisations use promotion to successfully market events	<b>A1</b> Events, audiences and stakeholders <b>A2</b> Purpose and scope of marketing for events <b>A3</b> Principles of events marketing <b>A4</b> Marketing strategies for events	A report that evaluates different marketing strategies used by contrasting events and which considers the purpose and success factors of marketing in events.
<b>B</b> Develop a marketing campaign to promote an event	<b>B1</b> Research and feasibility <b>B2</b> Preparing a marketing campaign <b>B3</b> Creating marketing media <b>B4</b> Audience touchpoints <b>B5</b> Post-event marketing	A marketing campaign plan that includes a budget, timescale, pre- and post-event marketing materials and audience touchpoint planning for a selected event based on research and feasibility findings.
<b>C</b> Market and promote an event for a given audience	<b>C1</b> Marketing implementation <b>C2</b> Audience touchpoints <b>C3</b> Post-event marketing	Photographic/video evidence of learner-produced, post-event marketing materials, witness statements and assessor records must be presented.
<b>D</b> Evaluate the success of the marketing campaign in meeting objectives	<b>D1</b> Evaluation of the marketing of an event <b>D2</b> Critical success factors in marketing for events <b>D3</b> Suggestions for improvements	A report evaluating the success of the marketing campaign, with suggestions for improvement.



## Content

### Learning aim A: Explore how organisations use promotion to successfully market events

#### A1 Events, audiences and stakeholders

- Different types of events:
  - corporate, e.g. seminars, conferences, trade shows, exhibitions, workshops
  - social, e.g. reunions, parties, celebrations, conventions
  - private, e.g. weddings, birthdays, anniversaries, family events
  - virtual, e.g. webinars, networking events, webcasts, streaming events
  - charity, e.g. fundraisers, gala dinners, auctions
  - entertainment, e.g. festivals, concerts, carnivals, exhibitions, ceremonies, parades.
- Audience classification:
  - demographic segmentation – age, gender, ethnicity, geography, employment, income
  - psychographic segmentation – behaviour, needs, hobbies, social status, lifestyle.
- Stakeholders:
  - attendees
  - team members
  - community
  - suppliers
  - press and media
  - competitors
  - performers and participants.

#### A2 Purpose and scope of marketing for events

- Promoting brands, products and organisations.
- Generating income, fundraising, sales.
- Relationship building, audience engagement.
- Improving knowledge of products and services.
- Promoting community, groups, organisations.
- Improving collaboration and cohesion among stakeholders.

#### A3 Principles of events marketing

- Qualitative and quantitative research.
- Event objectives, purpose and reasoning.
- Branding and personality.
- Audience and target market.
- Budget planning.
- Timelines.
- Project management.
- Sustainability.
- Ethics.
- Managing risk.

**A4 Marketing strategies for events**

- Cause marketing: alignment of the brand to a well-known or on-trend issue.
- Relationship marketing: enhancement and building of relationships with customers through marketing campaigns and interactions.
- Diversity marketing: targeting different marketing segments with different marketing campaigns and promotional materials.
- Fully digital marketing: progressive marketing focusing solely on the online and digital promotion and advertising of events.
- Content marketing: creation and sharing of online materials to stimulate interest in products or services rather than the overarching brand.
- Influencer marketing: implementation of endorsements, brand partnerships, gifting and product placement with people and organisations with expert knowledge or social influence.
- Experiential marketing: creation of experiences to build relationships with an audience through emotional stimulation and interactive, collaborative activities.
- Guerrilla marketing: enhancement of audience interest and interaction through surprise and unconventional interactions, e.g. flashmobs, publicity stunts, live art and street performance.

**Learning aim B: Develop a marketing campaign to promote an event****B1 Research and feasibility**

- Research activities:
  - primary and secondary research
  - qualitative and quantitative research
  - stakeholder interviews
  - event trends and themes
  - market and audience – size, demographic, affordability
  - event venue – location, size, availability, audience perception
  - competition – similarity, location, cost, experience, reputation, marketing methods.
- Feasibility factors:
  - event clarity and purpose
  - aims and objectives of event
  - constraints: budget, technical, resources; human and physical
  - technical feasibility
  - operational feasibility
  - economic feasibility
  - ethical feasibility.

**B2 Preparing a marketing campaign**

- Rationale of the campaign and event.
- Aims and objectives of the marketing campaign.
- Key performance indicators.
- Research and analysis:
  - primary, e.g. surveys, questionnaires, focus groups
  - secondary, e.g. reports and studies done by government agencies, trade associations or other organisations in the industry.
- Situational analysis:
  - SWOT (strengths, weaknesses, opportunities, threats)
  - PESTLE (political, economic, social, technological, legal and environmental)
  - Porter’s Five Forces.
- Event image and branding.
- Budgeting.
- Timelines for campaign, including monitoring and milestones.

**B3 Creating marketing media**

- Print-based media: flyers, leaflets, posters, brochures, tickets, newspaper, billboard, programmes, running orders, signage.
- Digital media: videos, social media, email, websites, SEO, blogs.
- Content: venue information, directions, transport links, pricing, registration and booking instructions, add-ons, promotional offers, sponsor and partner information, QR codes.
- Design and proofing: layout, storyboarding, colour schemes, themes, typography, quality checks, brand and event image alignment.
- Communication: tone, language, formality, accuracy.
- Distribution: location, methods, frequency, digital sources.
- Promotional methods: sales promotions, competitions, giveaways, VIP experiences, social media interactions, discounts, early-bird deals.

**Learning aim C: Market and promote an event for a given audience****C1 Marketing implementation**

- Communication of the plan.
- Timescales, deadlines and milestones.
- Campaign launch.
- Distribution of marketing materials.
- Digital marketing tracking, monitoring and responding.
- Adjustments and contingencies.

**C2 Audience touchpoints**

- Physical touchpoints:
  - entrance and exit points
  - feedback stations
  - promotion personnel
  - sales personnel
  - promotional giveaways or samples.
- Digital touchpoints:
  - social media interaction
  - website interaction
  - hashtagging
  - virtual marketing
  - mobile applications.

**C3 Post-event marketing**

- Delayed feedback: post-event email, surveys, feedback competitions, paper surveys, post-event social media updates, recommendation polls.
- Sharing event highlights: social media coverage, press coverage, website updates.
- Follow-up marketing: email, social media, letters, cards.
- Appreciation: gratitude letters, recognition awards, delegate thanks.
- Responding to audience complaints, feedback and suggestions.

## **Learning aim D: Evaluate the success of the marketing campaign in meeting objectives**

### **D1 Evaluation of the marketing of an event**

- Review of success: meeting aims and objectives, timing, keeping to set budget.
- Effectiveness of research and planning.
- Effectiveness of marketing methods.
- Effectiveness of pre-event and post-event marketing.
- Analytics of digital marketing methods: number of shares, website views, social media interactions.
- Impact of teamwork and communication across team members.
- Analysis of audience feedback.
- Review of attendance figures.
- Review of challenges and issues faced.

### **D2 Critical success factors in marketing for events**

- Setting of targets and goals.
- Timescales; pre-event, during and post-event.
- Attendance targets; ticket sales, audience numbers, venue capacities.
- Audience engagement: feedback, interactions, post-event promotion.
- Income generation: breakeven, profit margins, upselling.

### **D3 Suggestions for improvements**

- Improvements to pre-event marketing.
- Improvements to marketing: materials, distribution, length of campaign, appropriateness of media, a variety of media.
- Improvements to audience touchpoints and interactions.
- Staffing, skills, scheduling, training and development.
- Audience feedback and areas of development.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Explore how organisations use promotion to successfully market events</b>		A.D1 Evaluate the success of marketing strategies and methods used in different events, recommending areas of improvement.
<b>A.P1</b> Explain the purpose of marketing used to promote different events. <b>A.P2</b> Explain different marketing strategies that could be used to achieve event objectives.	<b>A.M1</b> Analyse the effectiveness of marketing strategies in supporting the achievement of event aims and objectives for different events.	
<b>Learning aim B: Develop a marketing campaign to promote an event</b>		B.D2 Produce a thorough and effective marketing plan for an event, with detailed research, budgeting, time-planning and effective promotional materials.
<b>B.P3</b> Produce an outline marketing plan for a selected event to support a given purpose. <b>B.P4</b> Produce marketing materials to meet the aims and objectives of the marketing campaign and event.	<b>B.M2</b> Produce a detailed marketing plan for an event with research, budgeting, time-planning, and appropriate promotional materials.	
<b>Learning aim C: Market and promote an event for a given audience</b>		CD.D3 Evaluate the success of the implementation and outcomes of the marketing campaign, justifying suggestions for improvements.
<b>C.P5</b> Promote an event using marketing materials and methods to a given audience	<b>C.M3</b> Demonstrate effective marketing skills when promoting an event and gathering audience feedback.	
<b>Learning aim D: Evaluate the success of the marketing campaign in meeting objectives</b>		
<b>D.P6</b> Review the success of the marketing campaign in meeting aims and objectives.	<b>D.M4</b> Analyse the planning and implementation of the marketing campaign, making recommendations for future improvements.	

## Essential information for assignments

The recommended structure of assessment is shown in the unit summary along with suitable forms of evidence. *Section 6 Internal assessment* gives information on setting assignments and there is further information on our website.

There is a maximum number of three summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aim: B (B.P3, B.P4, B.M2, B.D2)

Learning aims: C and D (C.P5, D.P6, C.M3, D.M4, CD.D3)

## Further information for teachers and assessors

### Resource requirements

For this unit, learners will need access to a range of current events management and marketing information from websites and printed resources. They will also need access to an appropriate live event with which they can develop and run a marketing campaign.

### Essential information for assessment decisions

The event selected should allow learners to fulfil the skills and activities required by the assessment criteria while ensuring learners and participants are safe. The selected event needs to provide opportunities for a reasonable range of marketing media to be developed and implemented and a reasonable level of audience interaction.

Learners should produce their own independent evidence if working in a group.

### Learning aims A

**For distinction standard,** learners will draw on varied information of how one event uses different strategies and methods of marketing to achieve goals and outcomes. They will include justification of how promotion helps to meet the purpose of marketing for an event, and how this contributes to its overall success, giving recommendations for improvement.

**For merit standard,** learners will present the outcome of a detailed examination of the marketing strategies in relation to two contrasting events, scrutinising the ways in which these are effective in supporting events to achieve their aims and objectives. They will offer a methodical examination of the purpose of each event and align this to the marketing strategies being implemented.

**For pass standard,** learners will show clear details of different events and the purpose and strategies of marketing in an events context. They will also give reasons for different marketing strategies and how they can support an event in reaching objectives.

### Learning aim B

**For distinction standard,** learners will produce a robust marketing plan which is accompanied and supported by detailed research and findings. The marketing plan will include a comprehensive coverage of the marketing mix, budgeting and timescales which align to the purpose and scope of the event and its aims and objectives. Learners will present effective promotional materials that are fully representative of the event, purpose and scope in line with the target audience.

**For merit standard,** learners will produce a detailed marketing plan for a selected event which reflects research findings. The marketing plan will consider the marketing mix, budgeting and timescales in line with the event context and will be accompanied by marketing materials which are suited to the audience and purpose.

**For pass standard,** learners will produce an outline plan for the marketing of a selected event considering research, aims and objectives. They will select and produce marketing materials in order to promote the event to an identified audience.

### Learning aims C and D

**For distinction standard,** learners will implement a comprehensive marketing campaign for a selected event, effectively gathering feedback in order to evaluate and justify its success in meeting aims and objectives. They will draw on a variety of information, including combining feedback with personal evaluation in order to justify the success of the marketing campaign, giving detailed suggestions for improvement and development.

**For merit standard,** learners will effectively promote a selected event in line with their campaign plan, implementing marketing materials and using audience touchpoints and post-event marketing to continue the promotion of the event. They will consider the planning and implementation of the campaign methodically, examining its success in line with feedback to make recommendations for improvement.

**For pass standard,** learners will implement their marketing campaign to promote an event and gather feedback. They will make a formal assessment of the success of the campaign in meeting aims and objectives and in line with the campaign's achievements and shortfalls.

### Links to other units

This unit links to:

- Unit 1: Careers in Marketing
- Unit 8: Customer Immersion Experiences
- Unit 10: Work Experience in Marketing.

### Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers from marketing and events management organisations
- marketing materials as exemplars
- event planning materials as exemplars
- support from marketing and events management professionals as mentors.



# Unit 8: Customer Immersion Experiences

Level: **3**

Unit type: **Internal**

Guided learning hours: **60**

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## Unit in brief

Learners plan and manage a customer immersion event for a selected product or service and evaluate its success.

## Unit introduction

The marketing of products and services no longer relies on traditional audience interactions but instead on the emotional and physical connections that are formed with consumers. Marketeers are therefore implementing methods to align with consumers on a personal level, encouraging human interaction, excitement and engagement through unusual and creative experiences and events. Products and services that implement creative and innovative experiential events are more likely to improve sales and recognition by capturing consumers through emotions and experiences.

In this unit you will investigate how customer experiences are used in campaigns through experiential marketing. Using your findings, you will develop and manage an experiential marketing event for a selected product or service. Based on the success and feedback of your event you will evaluate the success of experiential marketing and make suggestions for improvements.

This unit will help you to progress to employment in marketing and events management roles. It will also help you to move on to further study in higher education and to professional qualifications related to marketing, promotion and events management.

## Learning aims

This unit links to:

- A** Investigate the marketing of customer experiences for different products and services
- B** Plan and deliver a customer experience to meet objectives
- C** Reflect on the success of the customer experience in meeting set objectives.

## Summary of unit

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Investigate the marketing of customer experiences for different products and services	<p><b>A1</b> Purpose of customer experiences as marketing tools</p> <p><b>A2</b> Experiential marketing strategies</p> <p><b>A3</b> Immersion experiences in customer experience events</p>	A report evaluating the purpose and use of customer immersion experiences in marketing campaigns for different products or services.
<b>B</b> Plan and deliver a customer experience to meet objectives	<p><b>B1</b> Research, feasibility and success factors</p> <p><b>B2</b> Creating a customer experience plan</p> <p><b>B3</b> Contingency, emergency planning and risk management</p> <p><b>B4</b> Management of the customer experience</p> <p><b>B5</b> Gathering feedback</p>	<p>A plan detailing customer immersion experiences, budgeting and timescales.</p> <p>Working as part of a group, learners must take an active role in the management of an experiential customer event, providing photographic evidence, witness statements.</p> <p>A report evaluating the success of the customer experience event, with clear suggestions for improvement.</p>
<b>C</b> Reflect on the success of the customer experience in meeting set objectives	<p><b>C1</b> Evaluation of the customer experience</p> <p><b>C2</b> Suggestions for improvements</p>	

## Content

### Learning aim A: Investigate the marketing of customer experiences for different products and services

#### A1 Purpose of customer experiences as marketing tools

- Improve image and representation.
- Increase digital/physical foot fall.
- Increase sales and revenue.
- Improve interaction with consumers and target audience.
- Branch into a new target market or demographic.
- Gain publicity, news mentions and exposure.
- Improve social media marketing and interactions.
- Launch new products/services.

#### A2 Experiential marketing strategies

- Showcase strategy: allowing consumers to experience the product/service face to face through immersive interactions.
- Guerrilla strategy: use of surprise experiences and the 'shock' factor to engage consumers and generate interactions.
- Digital experience strategy: use of technology, virtual reality, online platforms, gaming to promote a product or service by offering a digital experience.
- Sense strategy: using events and interactions with consumers to target their five senses individually or simultaneously to promote engagement.
- Giveaway strategy: promoting products or services through giveaways, freebies and mass-marketing audience touchpoints.
- Emotive strategy: using events, touchpoints and experiences to target emotional responses in consumers to promote interactions and engagement.

#### A3 Immersion experiences in customer experience events

- Pop-up attractions.
- Augmented/virtual reality.
- Interactive activities.
- Demonstrations.
- Performances.
- Livestream events and digital interactions.
- Face-to-face giveaways/promotions.
- Brand experiences.
- Character meets.
- Product testing.

### Learning aim B: Plan and deliver a customer experience to meet objectives

#### B1 Research, feasibility and success factors

- Research activities:
  - primary and secondary research
  - qualitative and quantitative research
  - competitor review
  - analysis of previous experiential marketing events.

- Feasibility factors:
  - event clarity and purpose
  - aims and objectives of the customer experience
  - brand/product/service personality
  - technical feasibility
  - legal feasibility
  - health and safety constraints
  - ethical feasibility.
- Success factors:
  - customer experience aims and objectives
  - engagement targets
  - audience interaction targets.

### **B2 Creating a customer experience plan**

- Customer experience rationale and purpose.
- Aims and objectives.
- Logistics:
  - venue selection/location and layout
  - catering and refreshments
  - activities and entertainment
  - staffing – management, volunteers, temporary staff, performance artists
  - outsourcing and external human resources
  - promotional materials
  - technological resources.
- Partnerships/co-promotions.
- Publicity, press, social media.
- Budgets and financial forecasts.
- Timelines and milestones.
- Customer experience planning tools:
  - the customer experience planning process: research, design, planning, coordination and evaluation
  - mind mapping
  - Gantt charts
  - critical path analysis
  - production schedules
  - online planning tools.

### **B3 Contingency, emergency planning and risk management**

- Physical contingencies: weather, damage, venue access.
- Human resource contingencies: sickness, holidays, skills shortages, no-shows.
- Technical contingencies: power failure, internet outage, computer malfunction.
- Emergency incidents: fire, flood, injury, venue damage, electrocution, terrorism.
- Safety measures: crowd management, evacuation procedures, incident control, first aid.

### **B4 Management of the customer experience**

- Contracts for venue: suppliers, personnel, catering, entertainment.
- Staffing and scheduling.
- Entertainment, e.g. music, live art, videos.
- Security and health and safety.
- Logistics: deliveries, transport, directions, parking.
- Resources: audio, visual, technological, tools, furniture, supplies, payment processes.
- Catering and refreshments.
- Promotional materials and giveaways.
- Customer service, e.g. meet and greet, interaction points, guides, help points.

**B5 Gathering feedback**

- Audience touchpoints.
- Collecting data methods, e.g.:
  - interviews
  - survey
  - face to face
  - live social media updates
  - feedback buttons
  - event apps.
- Delayed feedback: post-event email, surveys, feedback, competitions, paper surveys, post-event social media updates, recommendation polls.
- Social media shares, highlights, interaction data.

**Learning aim C: Reflect on the success of the customer experience in meeting set objectives****C1 Evaluation of the customer experience**

- Review of success: meeting aims and objectives, timing, keeping to budget set.
- Effectiveness of events management planning.
- Effectiveness of pre-event and post-event information.
- Analytics of digital marketing methods: number of shares, website views, social media interactions.
- Impact of teamwork and communication across team members.
- Analysis of audience feedback.
- Review of attendance figures.
- Review of challenges and issues faced.

**C2 Suggestions for improvements**

- Improvements to the customer experience: location, type, audience size, resources, suppliers, venues.
- Improvements for marketing: materials, distribution, length of campaign, appropriateness of media.
- Staffing, skills, scheduling, training and development.
- Audience feedback and areas of development.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Investigate the marketing of customer experiences for different products and services</b>		
<p><b>A.P1</b> Explain the purpose of using customer experiences in marketing campaigns.</p> <p><b>A.P2</b> Describe the use of customer immersion experiences in the promotion of different products/services.</p>	<p><b>A.M1</b> Analyse the effectiveness of customer immersion experiences in the promotion of different products/services.</p>	<p><b>A.D1</b> Evaluate the importance of customer immersion experiences in the promotion of different products/services to achieve successful outcomes.</p>
<b>Learning aim B: Plan and deliver a customer experience to meet objectives</b>		
<p><b>B.P3</b> Produce an outline plan including immersion experiences for an experiential marketing event that will promote a selected product or service.</p> <p><b>B.P4</b> Produce a basic budget and timescale for an experiential marketing event.</p> <p><b>B.P5</b> Demonstrate relevant management and marketing skills when running an experiential event and gathering audience feedback.</p>	<p><b>B.M2</b> Produce a detailed plan including appropriate immersion experiences with detailed research, budgeting and timescales that will promote a selected product or service.</p> <p><b>B.M3</b> Demonstrate effective management and marketing skills when running an experiential event and gathering audience feedback.</p>	<p><b>B.D2</b> Implement a comprehensive plan including well developed immersion experiences to effectively promote a selected product or service.</p> <p><b>C.D3</b> Evaluate the importance of the detailed customer experience plan and immersion experiences in the effective promotion of a selected product or service, justifying suggestions for improvement.</p>
<b>Learning aim C: Reflect on the success of the customer experience in meeting set objectives</b>		
<p><b>C.P6</b> Review the success of the customer experience in meeting aims and objectives.</p>	<p><b>C.M4</b> Analyse the success of planning and use of immersion experiences in promoting a product or service effectively outlining relevant areas for improvement.</p>	

## Essential information for assignments

The recommended structure of assessment is shown in the unit summary along with suitable forms of evidence. *Section 6 Internal assessment* gives information on setting assignments and there is further information on our website.

There is a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aims: B and C (B.P3, B.P4, B.P5, C.P6, B.M2, B.M3, C.M4, B.D2, C.D3)

## Further information for teachers and assessors

### Resource requirements

For this unit, learners will need access to a range of information on current events and marketing, from websites and printed resources.

### Essential information for assessment decisions

#### Learning aim A

**For distinction standard,** learners will draw on varied information about the importance of the ways that experiential marketing events and immersion experiences are used to successfully promote a product or service. There will be clear justification as to how such marketing events have helped the success of the marketing and achievement of a purpose and outcome for each of the products or services explored.

**For merit standard,** learners will present the outcomes of methodical and detailed examination about events and immersion experiences used to market two products or services, highlighting success factors and achievements. They will interpret the effectiveness of such methods in achieving outcomes and will analyse their findings.

**For pass standard,** learners will show clear details of events in marketing campaigns to explain their purpose and impact. They will give evidence on how two products or services have used events and immersion experiences as part of a marketing campaign to achieve successful outcomes.

#### Learning aims B and C

**For distinction standard,** learners will present a comprehensive plan for an event including immersion experiences to promote a selected product or service. They will implement their plan, managing the event from pre to post stage while gathering feedback and demonstrating effective marketing and management skills. Learners will evaluate the importance of the event plan and experiences and make suggestions for improvement using delegate feedback and self-reflection to underpin justifications.

**For merit standard,** learners will run and manage an experiential marketing event including immersion experiences in line with a detailed plan, research, budget and timescales to promote a selected product or service. They will engage effectively with audience members to gather feedback and demonstrate effective management and marketing skills.

**For pass standard,** learners will run and manage an experiential marketing event including immersion experiences for a selected product or service in line with a basic event plan, budget and timescale to demonstrate management and marketing skills. They will gather feedback from audiences in order to review the success of the event in meeting expected outcomes.

### Links to other units

This unit links to:

- Unit 1: Careers in Marketing
- Unit 7: Marketing an Event
- Unit 10: Work Experience in Marketing.

### Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers from marketing and events management businesses
- marketing materials as exemplars
- support from marketing professionals as mentors.



# Unit 9: Activating a Brand

Level: **3**

Unit type: **Internal**

Guided learning hours: **60**

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## Unit in brief

Learners apply techniques used to visually promote the sale of products in outlets.

## Unit introduction

Retail environments, whether physical or digital, use techniques designed to encourage the sale of products or services. Activating a brand is the art of displaying products in ways that customers will find engaging and appealing. Physical, visual and experiential promotional techniques in retail environments are all important aspects of brand activation, designed to increase traffic and sales volume.

In this unit, you will investigate brand-activation techniques, including the use of locations, communication and legal and ethical practice. You will use this to inform your creation of brand activation in response to a client brief. You will apply testing, collection of feedback and reflection throughout the development, using marketing industry practice.

This unit will help you to progress to employment, vocational training and higher apprenticeships, and to higher education in marketing-related roles or qualifications.

## Learning aims

In this unit you will:

- A** Investigate brand activation practice for a selected organisation
- B** Create brand activation for a specific client brief
- C** Respond to testing, feedback and reflection in the development of brand activation for a client brief.

## Summary of unit

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Investigate brand activation practice for a selected organisation	<b>A1</b> Organisation needs for brand activation <b>A2</b> Spaces for brand activation <b>A3</b> Brand activation techniques <b>A4</b> Communication practice in brand activation <b>A5</b> Legal, safety and ethical considerations	A portfolio of research and analysis into a range of brand activation strategies.
<b>B</b> Create brand activation for a specific client brief	<b>B1</b> Design development <b>B2</b> Media and materials <b>B3</b> Production techniques and processes	A portfolio of brand activation design development with a final outcome.
<b>C</b> Respond to testing, feedback and reflection in the development of brand activation for a client brief	<b>C1</b> Testing and feedback <b>C2</b> Reflection of development and production <b>C3</b> Evaluative factors	

## Content

### Learning aim A: Investigate brand activation practice for a selected organisation

#### A1 Organisation needs for brand activation

- Specific purposes, e.g.:
  - increase awareness
  - instilling confidence in customers
  - increase sales
  - promote specific products
  - differentiate
  - target specific markets
  - increase market reach
  - rebrand
  - brand loyalty
  - provide information.

#### A2 Spaces for brand activation

- Spaces for visual merchandising, e.g.:
  - online and physical
  - department and discount stores
  - supermarkets
  - convenience, factory outlets, warehouses
  - not-for-profit, such as charities
  - non-standard, such as 'pop-up' shops, farm shops, markets, events spaces
  - leisure complexes.

#### A3 Brand-activation techniques

- Styling, presentation, art direction.
- Product segmentation: by theme, promotion, event, and season; across business.
- Approach: themes/stories, coordination, colour/style blocks, complementary/contrasting colours, repetition, mirror imaging and triangular formulation, focal points, branding/signage, mass display, micro-merchandising, demonstrations, fresh and relevant products.
- Experiential merchandising: augmented reality, immersive experience.
- Props: mannequins/busts/forms, furnishing enhancements.
- Fixtures: gondolas, end caps, dump tables/bins, garment rails, slat walls, counters, shelves, platforms, showcases, forms.
- Free-standing displays: stacks, islands.
- Imaging and online content: photography, lighting, text, image manipulation.

#### A4 Communication practice in brand activation

- Brand activation:
  - images
  - experiential
  - formal elements
  - typography
  - materials
  - textures
  - lighting
  - scale
  - use of branding
  - signage.

- Non-visual communication, e.g.:
  - sound and music
  - scent
  - touch
  - taste
  - atmosphere
  - interaction, such as screens.
- Positioning and visibility, e.g.:
  - placement
    - physical, such as windows, transition zones, fitting rooms, proximity to high-traffic areas
    - online, such as above the fold, landing page, consistency, accessibility, hierarchy
    - event spaces
  - sight lines
  - ergonomics and anthropometrics
  - composition – vertical or horizontal
  - directions, such as announcements, signage.

#### **A5 Legal, safety and ethical considerations**

- Point of sale (POS) and ticketing:
  - selling price and ticket positioning legislation
  - product labelling legislation: quantity, size, composition, origin.
- Product safety legislation.
- Weights and measures legislation.
- Consumer protection legislation.
- Food safety legislation.
- Health and safety legislation.
- Display safety: height of merchandise, stability, weight distribution/capacity, correct temperature, signage.
- Ethical considerations, e.g. inclusivity, accessibility, age, vulnerable people, consent.

### **Learning aim B: Create brand activation for a specific client brief**

#### **B1 Design development**

- Brand activation process, e.g.:
  - defining a client brief
    - scope and parameters
    - target market
    - objectives
    - client and target market needs
  - research and scoping
  - concept visuals and drafts
  - model
  - prototyping
  - testing and feedback
  - revision and refinement
  - production.

#### **B2 Media and materials**

- Media and materials, e.g.:
  - physical – card, plastic, fabric, paper, metal, readymade objects
  - digital – images, colours, typography, video, graphics, sound.

**B3 Production techniques and processes**

- Methods of creation, e.g.:
  - design software – vector, raster, type
  - multimedia software – video, interaction
  - printing processes
  - media and material manipulation
  - fabrication, such as connecting, sculpting, fastening, adaptation
  - spatial development, such as attachment, hanging, installing, connecting, painting, arranging and organisation
  - health and safety.

**Learning aim C: Respond to testing, feedback and reflection in the development of brand activation for a client brief****C1 Testing and feedback**

- Iterative testing.
- Use of audience for testing and feedback:
  - client
  - audience, users and target market
  - peers.
- Recording information from testing.
- Visual and observation records of tests.
- Location or simulated.
- Collecting feedback, e.g. questionnaire, focus group, survey, interview.

**C2 Reflection of development and production**

- Throughout design development and production.
- Evaluating progress.
- Revising intentions, goals and targets.

**C3 Evaluative factors**

- Brand and brand guidelines.
- Initial intentions and client brief.
- Visibility.
- Impact.
- Suitability for audience.
- Development process.
- Durability and strength.
- Quality of production.
- Legal and ethical issues.
- Comparison with competition.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Investigate brand activation practice for a selected organisation</b>		<b>A.D1</b> Evaluate how the techniques and communication used in brand activation support organisation needs.
<b>A.P1</b> Explore brand activation organisation needs, use of spaces and legal and ethical issues. <b>A.P2</b> Explore brand activation techniques and communication practice in physical and online brand activation.	<b>A.M1</b> Compare how the techniques and communication used in brand activation supports organisation needs.	
<b>Learning aim B: Create brand activation for a specific client brief</b>		<b>BC.D2</b> Develop assured and sophisticated brand activation informed by in-depth and sustained assessment of development in relation to organisation and target market needs.
<b>B.P3</b> Outline the details of a brand activation brief. <b>B.P4</b> Develop appropriate brand activation for a specific client brief.	<b>B.M2</b> Develop effective brand activation informed by clear assessment of organisation and target market needs.	
<b>Learning aim C: Respond to testing, feedback and reflection in the development of brand activation for a client brief</b>		
<b>C.P5</b> Apply iterative testing and collection of feedback on development work of brand activation. <b>C.P6</b> Apply appropriate evaluation of the brand activation development and outcomes.	<b>C.M3</b> Apply effective testing and evaluation of brand activation throughout the development.	

## Essential information for assignments

The recommended structure of assessment is shown in the unit summary with suitable forms of evidence. Further information on setting assignments is given on our website. *Section 6 Internal assessment* gives information on setting assignments.

There is a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aims: B and C (B.P3, B.P4, C.P5, C.P6, B.M2, C.M3, BC.D2)

## Further information for teachers and assessors

### Resource requirements

Learners will need access to a range of current marketing information via websites and published resources. They will also need access to some design and production materials in order to meet the outcomes.

### Essential information for assessment decisions

#### Learning aim A

**For distinction standard,** learners will draw on broad and relevant information on pertinent brand activation themes and concepts. They will assess and compare the strengths, weaknesses, relevance and significance of brand activation techniques and communication used in the context of organisation needs, for both physical and online brand activation. Their judgements relating to the contribution that brand activation has on the success of the organisation will be justified, including the use of spaces, legal and ethical requirements.

**For merit standard,** learners will demonstrate clear analysis of relevant approaches and techniques used in brand activation. They will compare the brand activation techniques and communication used in different contexts and consider how these support different organisational needs, making some supported judgement about the success. Learners will also explain how brand activation techniques can be affected by organisational needs and legislative and ethical requirements, with reference to clear examples.

**For pass standard,** learners will give clear details of general brand activation techniques and communication practice for both online and physical spaces, describing and explaining the key factors with reference to examples. Learners will also explain how brand activation techniques can be affected by organisational needs and legislative and ethical requirements.

#### Learning aims B and C

**For distinction standard,** learners will create perceptive and effective brand activation either online or in traditional formats. Each aspect will be well developed, and the use of development and production techniques will be consistently applied. Brand activation will be comprehensively tested, considering target market needs and objectives using thorough methods. The message communicated and the formats applied will be engaging and assured in response to in-depth assessment of the organisation's needs, and the scope, parameters and opportunities in the brief.

**For merit standard,** learners will create appropriate brand activation either online or in traditional formats. Most aspects of the brand activation will be well developed. The use of development and production techniques will mostly be cohesive and competent. The brand activation will be tested at relevant stages of development, considering target market needs and objectives using suitable methods. The message communicated will be competent and considered, and the formats and materials development will be clearly informed by broad research into the target market and organisational needs.

**For pass standard,** learners will give a clear account of the scope, parameters and details of the brand activation brief, going into some logistical details of the requirements. They will use some of this information to inform brand activation for a specific client brief. The communication in the brand activation will generally relate to the organisation's objectives and will be coherent for the audience. Learners will apply some testing and collection of feedback throughout the development, which will have a limited impact on the development process. Learners will partially review their progress and outcomes using some relevant criteria on which to base their decisions and actions.



### Links to other units

This unit links to:

- Unit 5: Branding Products and Services
- Unit 6: Generating Customer Loyalty
- Unit 10: Work Experience in Marketing.

### Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers
- work experience
- participation in audience assessment of presentations
- opportunities to visit suitable organisations.



# Unit 10: Work Experience in Marketing

Level: **3**

Unit type: **Internal**

Guided learning hours: **60**

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## Unit in brief

Learners prepare and carry out work experience in a marketing environment. They will complete 40 hours of work experience, which allows them to assess and reflect on their practical workplace skills.

## Unit introduction

Work experience in marketing offers you valuable first-hand practical experience and the chance to look at and find out about a variety of jobs, including some you may never have considered. Engaging with employers and organisations allows insight into the systems, protocols and methods used by employers and organisations in the marketing industry. This will give you significant value; it will enrich your CV, improve and expand your work-based professional skills and enable you to make informed decisions about your career in marketing.

In this unit, you will engage in the complete process that undertaking work experience involves. You will explore marketing work-experience opportunities and develop application skills and techniques for obtaining work experience. You will apply professional skills and behaviours in the workplace to meet objectives set by an employer, while reflecting on your progress and development in order to sustain improvement, and to increase efficiency and productivity.

Work experience is highly valued by employers for a variety of careers in the marketing industry. This unit will support you in progressing to employment in a junior position and to studying marketing-related qualifications in higher education and apprenticeships.

## Learning aims

In this unit you will:

- A** Prepare for work experience to support progression into a career in marketing
- B** Carry out work experience in a marketing-related role to meet set objectives
- C** Reflect on work experience in a marketing-related role to inform own career progression.

## Summary of unit

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Prepare for work experience to support progression into a career in marketing	<b>A1</b> Work experience opportunities <b>A2</b> Marketing work experience preparation in relation to personal goals	A portfolio, including details of research on a marketing work experience and development of preparation materials.
<b>B</b> Carry out work experience in a marketing-related role to meet set objectives	<b>B1</b> Requirements in employment and employer needs <b>B2</b> Marketing skills for work experience duties	A logbook and portfolio. It will cover tasks carried out and refer to health and safety. Reflection for a personal/professional development portfolio (PDP).
<b>C</b> Reflect on work experience in a marketing-related role to inform own career progression	<b>C1</b> Reflective practice <b>C2</b> Further development opportunities in relation to career goals	

## Content

### Learning aim A: Prepare for work experience to support progression into a career in marketing

#### A1 Work experience opportunities

- Work experience opportunities, such as work placement, voluntary work, part-time work, internship.
- Types of role and their required skills and behaviours, e.g.:
  - non-sector-specific roles
    - market research assistant
    - marketing planner assistant
    - media buying executive
  - job roles in digital marketing
    - digital copywriter assistant
    - search engine optimisation (SEO) assistant
    - social media executive
    - web content assistant
  - job roles in advertising
    - account executive
    - account planning assistant
    - art executive
    - copywriter assistant
    - creative assistant
  - job roles in public relations
    - public affairs executive
    - public relations account executive
    - public relations assistant.
- Company or organisation background research:
  - sources
    - social media, web pages and marketing communications
    - professional body
    - network events
    - employees
  - information
    - type of product/service
    - size and structure of company/organisation
    - previous marketing material
    - pricing strategies
    - target audiences
    - market position
    - hours available
    - experience and skills required
    - duties and responsibilities
    - legal.

**A2 Marketing work experience preparation in relation to personal goals**

- Self-evaluation:
  - career goals, aspirations and interests
  - skills and attributes
  - knowledge and experience
  - self-audit and analysis, e.g. SWOT analysis.
- Preparation for work experience, e.g.:
  - personal aims and objectives
  - short-, medium- and long-term goals
  - actions and targets to gain work experience
  - timeline.
- Materials for work experience:
  - mapping skills and attributes to job descriptions and person specifications
  - communicating with company/organisation
  - negotiating work experience
  - application, e.g.
    - personal statement
    - CV
    - cover letter
    - application form
  - interview
    - rehearsal
    - preparing for questions
    - setting own questions
    - portfolio or presentation materials
    - dress code
    - verbal and non-verbal communication.

**Learning aim B: Carry out work experience in a marketing-related role to meet set objectives****B1 Requirements in employment and employer needs**

- Personal contribution, duties and responsibilities, e.g. negotiated and agreed.
- How role contributes to organisation.
- Organisational structure and role within the structure.
- Health and safety.
- Legal and ethical requirements:
  - copyright
  - liability
  - General Data Protection Regulations (GDPR)
  - representation
  - equality.

**B2 Marketing skills for work experience duties**

- Professional marketing skills, e.g.:
  - market research
  - internal stakeholder management
  - social media production
  - data analysis
  - database management
  - search engine optimisation (SEO)
  - content management systems (CMS)
  - content production

- USER experience (UX) and user interface (UI)
- design
- copywriting.
- Personal employment skills, e.g.:
  - punctuality and time management
  - following instructions
  - applying standards and protocols
  - communication
  - organisation
  - teamwork and collaboration
  - use of technology and IT skills
  - prioritising, setting targets and reviewing progress
  - analysis and problem solving
  - reporting on progress
  - adapting to changing circumstances
  - health and safety
  - ethical responsibilities.

### **Learning aim C: Reflect on work experience in a marketing-related role to inform own career progression**

#### **C1 Reflective practice**

- Reflection on experience:
  - formats for ongoing records, e.g. blog, journal, diary, visual records, portfolio
  - ongoing reflection and summative reflection
  - formative feedback and sources
    - appraisal
    - client
    - peer
    - tutor
    - employer, e.g. performance management
  - evaluating progress
    - learning development
    - comparison with initial skills audit
    - meeting goals and targets
    - strengths and areas for development.

#### **C2 Further development opportunities in relation to career goals**

- Defining needs:
  - knowledge and skills gaps
  - defining career path
  - strategies for development.
- Opportunities:
  - qualifications and professional body courses
  - experiences and employment
  - personal projects
  - networking
  - coaching and mentoring
  - research.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Prepare for work experience to support progression into a career in marketing</b>		<b>A.D1</b> Develop comprehensive materials through strategically aligning organisation requirements with personal skills and behaviours.
<p><b>A.P1</b> Explain the skills and behaviours required for different job roles in relation to work experience opportunities.</p> <p><b>A.P2</b> Develop basic materials for applying for work experience in marketing.</p>	<p><b>A.M1</b> Develop effective materials through detailed assessment of work experience requirements and professional skills and behaviours for work experience in marketing.</p>	
<b>Learning aim B: Carry out work experience in a marketing-related role to meet set objectives</b>		<b>B.D2</b> Perform role and responsibilities confidently, adapting to changing circumstances and applying company/organisation protocols and standards systematically.
<p><b>B.P3</b> Describe the role undertaken within the organisation structure and negotiate set objectives to meet the needs of the employer.</p> <p><b>B.P4</b> Demonstrate appropriate marketing and professional skills in order to meet set employer objectives.</p>	<p><b>B.M2</b> Demonstrate effective marketing and professional skills in order to meet set employer objectives.</p>	
<b>Learning aim C: Reflect on work experience in a marketing-related role to inform own career progression</b>		<b>C.D3</b> Evaluate the marketing and professional skills used to complete work experience, drawing reasoned conclusions as to how it can support own future career.
<p><b>C.P5</b> Review own strengths and areas for development during work experience in marketing.</p> <p><b>C.P6</b> Identify improvements to be made to own personal and professional skills in response to feedback from work experience in marketing.</p>	<p><b>C.M3</b> Assess own performance during work experience in marketing, making recommendations for personal and professional development.</p>	



## Essential information for assignments

The recommended structure of assessment is shown in the unit summary along with suitable forms of evidence. *Section 6 Internal assessment* gives information on setting assignments and there is further information on our website.

There is a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aims: B and C (B.P3, B.P4, C.P5, C.P6, B.M2, C.M3, B.D2, C.D3)

## Further information for teachers and assessors

### Resource requirements

A work placement of 40 hours in a marketing environment is required.

### Essential information for assessment decisions

#### Learning aim A

**For distinction standard,** learners will carry out in-depth research and select relevant evidence to show how they chose an appropriate marketing work experience opportunity, fully mapping their behaviours, skills and attributes to the job description, person specification and organisation requirements. They will demonstrate professional communication skills when dealing with the work experience organisation and produce a detailed and professional CV, cover letter, application form and personal statement. For their work placement interview, learners will fully prepare and rehearse answers to potential questions, set some of their own analytical questions for the interviewer, ensure they are dressed professionally and display excellent verbal and non-verbal communication skills.

**For merit standard,** learners will select and apply relevant knowledge of work experience in the marketing industry. Learners will demonstrate a clear assessment of the benefits of work experience and how it can support them in gaining a realistic understanding of opportunities in the marketing industry. They will demonstrate a clear and thorough understanding of the requirements of the placement and will demonstrate how their skills and behaviours align to most elements of the job description and person specification. They will demonstrate mostly professional communication skills when dealing with the work experience organisation and will produce a professional CV, cover letter, application form and personal statement, though some elements may be more detailed than others. For their work placement interview, learners will prepare and rehearse answers to potential questions, set some of their own questions for the interviewer, ensure they are dressed professionally and display appropriate verbal and non-verbal communication skills.

**For pass standard,** learners will carry out research that allows them to give reasons why the appropriate skills and behaviours are necessary for work experience. Learners will need to consider at least two job roles. They will demonstrate some understanding of the requirements of the placement. They will show some professional communication skills when dealing with the work experience organisation and will produce a basic CV, cover letter, application form and personal statement that may include some communication errors. For their work placement interview, learners will rehearse some answers to potential questions, ensure they are dressed professionally and display mostly appropriate verbal and non-verbal communication skills.

#### Learning aims B and C

**For distinction standard,** learners will undertake their work experience role with confidence and professionalism at all times. During the working day, they will be able to adapt to the changing needs of their employer. They will apply organisation protocols at all times and be fully aware of when and how to escalate issues to their superiors. All communication during the placement will be in line with the work experience organisation's standards and may exceed them. Learners will reflect in depth on their work experience and its benefits for their career. They will come to a reasoned conclusion, supported by relevant evidence and feedback from others, about their strengths and weaknesses and will reflect on opportunities for improvement.

**For merit standard,** learners will undertake their work experience role effectively, remaining professional. They will be able to carry out most tasks asked of them to a good standard. All communication during the placement will be in line with the organisation's standards. Learners will reflect to show that they have assessed the workplace skills they have been shown and, by listening to feedback from others, the skills they will need in the workplace in the future. Learners will be able to successfully support their assessment with examples from their work experience.

**For pass standard**, learners will undertake their work experience role appropriately, remaining mostly professional. They will be able to carry out the tasks asked of them with some support. They will be able to give a clear and objective account, recalling their work experience and the skills they demonstrated that met the needs of their employer. Learners will reflect to show an understanding of the skills needed in the workplace, both personal and professional, and will use feedback to put together goals for improvement.

### Links to other units

This unit links with all other units in the specification.

### Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers
- work experience
- own business materials as exemplars
- support from local business staff as mentors.



# Unit 11: Influencer Marketing

Level: **3**

Unit type: **Internal**

Guided learning hours: **60**

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## Unit in brief

Learners investigate influencer marketing and develop an influencer marketing plan for a specific organisation.

## Unit introduction

Influencer marketing is a growing business. While considered a new idea, the concept of influence has been established for many years and influencers are not a new concept but an updated form of opinion leader. In a changing marketing environment, where traditional methods of promotion, such as newspaper and terrestrial television advertising, have decreased, combined with a decline in trust in organisations, new ways of communication have emerged through social media platforms. This has resulted in the growth of influencers, also known as key opinion leaders, who are being engaged by organisations to promote their goods. In their online platforms, influencers generate content, share material about brands and discuss their experiences.

There are two main influencer categories – mega and micro. The major influencers have many hundreds of thousands of followers on social media platforms and may be well-known celebrities. At the other end of the scale, micro-influencers may have followings of 5,000 to 100,000, and may be more dedicated individuals focused on a particular area of interest that may have started as a hobby, sharing information about an interest, later turning professional. Many types of organisations use influencer marketing, from opinion leaders in charities to well-known businesspeople in business-to-business (B2B) organisations, as well as celebrities for well-known brands.

In this unit, you will investigate types of influencer and the requirements for a successful influencer campaign. You will contextualise this in an influencer marketing campaign. Based on this marketing research, you will develop an influencer marketing plan and a brief for the influencer.

This unit will help you to progress to employment in the digital marketing industry. It will also help you to move on to further study in higher education and to professional qualifications related to marketing.

## Learning aims

In this unit you will:

- A** Investigate influencers and their associated marketing campaigns
- B** Explore the use of influencer marketing within a specific market sector
- C** Develop an influencer marketing plan for a specific organisation.

## Summary of unit

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Investigate influencers and their associated marketing campaigns	<b>A1</b> Types of influencers and influencer requirements <b>A2</b> Types of influencer marketing campaigns	A report evaluating the relationship between influencer, type of influencer campaign and influencer requirements.
<b>B</b> Explore the use of influencer marketing within a specific market sector	<b>B1</b> Objectives of influencer marketing <b>B2</b> Legal and ethical considerations <b>B3</b> Assessing an influencer marketing campaign	Portfolio of market research, influencer marketing plan and brief for influencer.
<b>C</b> Develop an influencer marketing plan for a specific organisation	<b>C1</b> The influencer marketing plan <b>C2</b> Preparing a brief for the influencer	

## Content

### Learning aim A: Investigate influencers and their associated marketing campaigns

#### A1 Types of influencers and influencer requirements

- Early adopters (individuals who adopt new goods and services faster than others):
- the behaviour of sharing and influencing news about products and services, such as the role of early adopters (Rogers' theory of Diffusion of Innovation) and their communities
  - awareness
  - recognition
  - engagement
  - intention to buy.
- Traditional influencers:
  - opinion leaders (knowledgeable enthusiasts)
  - opinion formers (qualified experts).
- Digital influencers, e.g.:
  - macro-influencers – typically celebrities and well-known people with over 100,000 followers
  - micro influencers – typically everyday individuals with between 2,000 and 25,000 dedicated followers
  - key opinion customers.
- Influencer characteristics, e.g.:
  - dedicated following
  - regular content
  - consistency
  - clear focus
  - exposure
  - engagement.

#### A2 Types of influencer marketing campaigns

- Types of influence on customers, e.g.:
  - brand and product awareness and attention
  - interest in functionality, style, quality and performance
  - desire for brand association and status
  - action leading to purchase.
- Types of influencer marketing campaigns, e.g.:
  - paid-for endorsements
  - product reviews
  - unboxing videos
  - promotional content
  - giveaways
  - competitions
  - social media takeovers
  - guest blog posts
  - brand ambassadors
  - affiliate marketing programmes.

## **Learning aim B: Explore the use of influencer marketing within a specific market sector**

### **B1 Objectives of influencer marketing**

- Reasons for using influencers, e.g.:
  - promote a brand, product or service
  - gain awareness
  - increase engagement
  - create more links to the organisation's content
  - drive app downloads
  - change brand perception
  - direct communication with customers
  - closeness of influencer to customers' tastes/likes
  - influencing consumer trust
  - going viral – cross-platform proliferation, such as
    - forums
    - review and rating platforms
    - social media platforms
    - blogs.

### **B2 Legal and ethical considerations**

- The difference between sponsorship and endorsements:
  - paid-for sponsorship in exchange for publicity, e.g.
    - product placement
    - blog posting
    - product mentions
  - endorsement or approval of product, location or service, which may be unpaid, e.g.
    - testimonials, reviews and recommendations
    - case studies of featured customers.
- Relevant legal considerations, e.g.:
  - data protection legislation
  - competition law
  - advertising codes of practice
  - consumer protection
  - Customer Contracts Regulations (Information, Cancellation and Additional Charges) 2013
  - requirements for specific products, such as alcohol, gambling, tobacco, food, healthcare, beauty products.
- Ethical issues, e.g.:
  - transparency of commercial relationships
  - declaring sponsorship
  - disclosing free goods or services
  - fake reviews.

### **B3 Assessing an influencer marketing campaign**

- Research into an influencer campaign, e.g.:
  - audience reach
  - targeting and types of customer
  - creativity
  - disclosure of sponsorship
  - exposure
  - audience feedback
  - relevance to the brand
  - behaviour by influencers.



## Learning aim C: Develop an influencer marketing plan for a specific organisation

### C1 The influencer marketing plan

- Relevant objectives for the plan.
- Target audience and demographic.
- Key messages.
- Network or platform.
- Selecting influencers:
  - relevance to organisation
  - resonance and influence
  - reach
  - approach of influencer.
- Compensation, e.g.:
  - payment
  - free products or discounts
  - commission or royalties
  - other expenses.
- Method and format, e.g.:
  - organisation controlled
  - creative freedom, such as
    - allowing influencers personal creative decisions
    - using own photographers or videographers
  - type of content needed, such as
    - copy
    - images
    - video.
- Schedule and timelines.
- Resources required to deliver the plan, e.g.:
  - costs
  - tools
  - time
  - people
  - materials.
- Tasks and responsibilities.

### C2 Preparing a brief for the influencer

- The brief:
  - purpose of campaign
  - objectives
  - timing requirements
  - platform
  - content requirements
  - outputs
  - payment
  - people involved.
- Other relevant information, e.g.:
  - background to the organisation
  - brand or product information
  - location for campaign
  - look and style details.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Investigate influencers and their associated marketing campaigns</b>		<b>A.D1</b> Evaluate the relationship between influencer, type of influencer campaign and influencer requirements.
<b>A.P1</b> Describe the different types of influencers and their characteristics. <b>A.P2</b> Explain the different types of influencer marketing campaigns.	<b>A.M1</b> Compare the different types of influencer and influencer marketing campaigns.	
<b>Learning aim B: Explore the use of influencer marketing within a specific market sector</b>		<b>BC.D2</b> Create a proficient and detailed influencer brief and marketing plan, based on specific objectives and a thorough examination of a relevant influencer campaign.
<b>B.P3</b> Explain fundamental issues in influencer marketing within a specific market sector. <b>B.P4</b> Review an influencer marketing campaign that meets set objectives.	<b>B.M2</b> Assess an influencer marketing campaign in detail within a specific market sector that meets set objectives.	
<b>Learning aim C: Develop an influencer brief and marketing plan for a specific organisation</b>		
<b>C.P5</b> Create an appropriate influencer marketing plan for a specific organisation. <b>C.P6</b> Create an appropriate brief for the influencer.	<b>C.M3</b> Create an effective influencer marketing plan and influencer brief based on clear objectives.	

## Essential information for assignments

The recommended structure of assessment is shown in the unit summary along with suitable forms of evidence. *Section 6 Internal assessment* gives information on setting assignments and there is further information on our website.

There is a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aims: B and C (B.P3, B.P4, C.P5, C.P6, B.M2, C.M3, BC.D2)

## Further information for teachers and assessors

### Resource requirements

There are no specific additional requirements for this unit.

### Essential information for assessment decisions

#### Learning aim A

**For distinction standard,** learners will undertake a methodical and in-depth examination of types of influencer, the types of influence they exert and the campaigns they undertake. They will break down the component parts of each and explain the relationship these have with each other in detail, drawing on pertinent examples from different types of influencing to communicate and support their findings.

**For merit standard,** learners will assess the types of influencer, their influence and the campaigns they undertake. They will break down the component parts of each and explain the relationship these have with each other in some detail, drawing on relevant examples from different types of influencing to communicate and support most of their findings.

**For pass standard,** learners will give an account of the types of influencer and outline their requirements in order to have an impact. They will identify varied and relevant types of influencer marketing campaigns, using mostly relevant examples for exemplification of their points.

#### Learning aims B and C

**For distinction standard,** learners will develop a sophisticated and thorough influencer marketing campaign plan covering all the main elements. The objectives will be reasoned and the message engaging for the target audience, and the type of campaign and platform will be clearly relevant for the target audience and demographic. The campaign will be informed by detailed examination of an influencer marketing campaign within a relevant sector and the fundamental issues in influencer marketing. The plan will include a clear and focused brief for the influencer that is well informed by appropriate objectives, with details of the purpose of the campaign, timing, platform, payment and content requirements.

**For merit standard,** learners will develop a sound and logical influencer marketing campaign plan, with detailed sections for most of the main elements. The objectives will be coherent and the message relevant for the target audience, and the type of campaign and platform will be mostly relevant for the target audience and demographic. The campaign will be informed by careful consideration of the influencer marketing campaign within a relevant sector and the fundamental issues in influencer marketing. The plan will be supported by a brief for the influencer that is informed by clear objectives, with clear identification of the purpose of the campaign, timing, platform, payment and content requirements.

**For pass standard,** learners will give details of the general issues in influencer marketing within a specific market sector, exemplifying and illustrating findings and observations with relevant examples. They will investigate an influencer marketing campaign, making observations of most of the key objectives and their impact. Learners will develop an adequate plan with general details of objectives, message and logistics. Learners will also develop a brief for the influencer that outlines the objectives, purpose of the campaign, timing, platform, payment and content requirements.

## Links to other units

This unit links to:

- Unit 1: Careers in Marketing
- Unit 4: Applying Digital Marketing
- Unit 10: Work Experience in Marketing.

## Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers
- visits to appropriate businesses
- work experience.



# Unit 12: Market Research for a Start-up Business

Level: **3**

Unit type: **Internal**

Guided learning hours: **60**

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## Unit in brief

Learners explore the different aspects of market research used by start-up businesses. They will undertake a research project for a start-up business, and interpret and analyse their findings.

## Unit introduction

Market research is critical to the development and continuation of organisations. The marketing industry has seen huge growth, with a wealth of data-collection, management and analytical tools being developed and improved, providing deeper and richer understanding of audience demographics, psychographics, habits and intentions. All of this gives a fascinating insight into customers and users, and into the ability of organisations to make more strategic decisions in terms of their offering.

In this unit, you will develop your research skills and your understanding of the role that market research information plays in identifying and satisfying customers' needs. You will gain an insight into the importance of collecting and interpreting market research information as a tool for making wider business decisions. You will explore the purpose and type of market research undertaken for a start-up business, and consider the objectives of the research and the processes followed. You will plan and undertake a research activity using appropriate design and sampling methods. You will analyse and interpret market research data and present your findings. You will use this knowledge to make recommendations for a selected start-up business.

This unit will help you to progress to employment in specific market research and analysis roles that may or may not be marketing related. The unit will also help you to progress to further study in higher education or professional qualifications in marketing or social sciences.

## Learning aims

In this unit you will:

- A** Examine types of market research used by start-up businesses to inform decision making
- B** Implement market research activities to meet a specific start-up business' marketing objectives
- C** Review market research findings and make recommendations for a start-up business.

## Summary of unit

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Examine types of market research used by start-up businesses to inform decision making	<b>A1</b> Purpose of market research <b>A2</b> Marketing objectives <b>A3</b> Types of research <b>A4</b> Appropriateness of choice of research	A report evaluating the different types of research used in start-up businesses to make decisions to meet marketing objectives.
<b>B</b> Implement market research activities to meet a specific start-up business' marketing objectives	<b>B1</b> Planning stage <b>B2</b> Market research activities	Market research portfolio with research tools and analysis, supported by conclusions and recommendations for a start-up business.
<b>C</b> Review market research findings and make recommendations for a start-up business	<b>C1</b> Statistical analysis and interpretation of primary and secondary research <b>C2</b> Presentation of research results <b>C3</b> Value of the information	



## Content

### Learning aim A: Examine types of market research used by start-up businesses to inform decision making

#### A1 Purpose of market research

- Understanding customer behaviour.
- Determining buying trends.
- Investigating brand/advertising awareness.
- Helping new product and/or service development.
- Investigating feasibility of entry into new markets.
- Meeting marketing objectives.

#### A2 Marketing objectives

- Understanding customer wants and needs.
- Developing new products.
- Improving profitability.
- Increasing market share.
- Diversification.
- Increased brand awareness and loyalty.
- Adopting new pricing strategies.
- Increasing sales volume.
- Expanding locations (physical and/or digital).
- Increasing efficiency in logistics and distribution.
- Adapting elements of the physical experience for customers.
- Adapting processes to better meet customer needs.
- Amending the impact people have on the customer experience.

#### A3 Types of research

- Qualitative and quantitative.
- Secondary research:
  - internal sources
    - EPOS/sales records
    - website monitoring
    - accounting records
    - customer satisfaction surveys
  - external sources
    - internet
    - government statistics
    - competitor reports
    - specialist market intelligence agencies, e.g. Mintel.
- Primary research:
  - surveys, questionnaires
  - observation
  - e-marketing
  - focus groups
  - pilot research.

#### A3 Appropriateness of choice of research

- Cost.
- Accuracy.
- Timelines.
- Response rates.

## **Learning aim B: Implement market research activities to meet a specific start-up business' marketing objectives**

### **B1 Planning stage**

- Problem definition.
- Set research objectives.
- Budget.
- Determine what data is to be collected.

### **B2 Market research activities**

- Methods to be used:
  - quantitative and qualitative
  - primary research and relevance to marketing objectives, e.g.
    - focus groups – attendee knowledge and appropriateness, size, management
    - questionnaire/survey – design, question types, sequencing, bias, sampling plan, probability and non-probability sampling, sample size and effect on confidence levels
    - observation – what to observe, relevance of observation activity, duration of observation, timing of observation
    - e-marketing – relevance of platform to target market, uptake, desensitisation
    - pilot research – size, relevance to size of the market, uptake, bias
  - secondary research and relevance to marketing objectives, e.g.
    - sales records
    - website and cookies
    - internet research
    - competitor reports.
- Data collection, primary and secondary.

## **Learning aim C: Review market research findings and make recommendations for a start-up business**

### **C1 Statistical analysis and interpretation of primary and secondary research**

- Statistical techniques, analysis and interpretation:
  - averages including arithmetic mean, mode, median
  - range and interquartile range
  - standard deviation
  - time series
  - scatter diagrams and trends.
- Analysis and interpretation of secondary research.

### **C2 Presentation of research results**

- Graphical and tabular presentation of results
- Written presentation of results, e.g. reports, presentation software
- Feedback, e.g. suggestions and recommendations.
- Awareness of audience type.

### **C3 Value of the information**

- Limitations of the research:
  - sufficiency
  - accuracy
  - bias
  - subjectivity
  - reliability of sample.
- Recommend improvements for the start-up business.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Examine types of market research used by start-up businesses to inform decision making</b>		<b>A.D1</b> Justify the use of selected market research methods in helping to meet marketing objectives and inform supported decision making for a start-up business.
<b>A.P1</b> Explain market research methods used by a selected start-up business to meet marketing objectives.	<b>A.M1</b> Assess the appropriateness of different market research methods in helping to meet marketing objectives and inform decision making for a start-up business.	
<b>Learning aim B: Implement market research activities to meet a specific start-up business' marketing objectives</b>		<b>B.D2</b> Evaluate the effectiveness of the research, justifying changes that should be made to market research activities.  <b>C.D3</b> Make justified suggestions to meet the specific marketing objectives, using complex data effectively to validate findings.
<b>B.P2</b> Conduct secondary market research activities for selected marketing objectives.	<b>B.M2</b> Analyse the reasons for the chosen market research activities in meeting the selected marketing objectives.	
<b>B.P3</b> Conduct primary market research activities for selected marketing objectives.		
<b>Learning aim C: Review market research findings and make recommendations for a start-up business</b>		
<b>C.P4</b> Interpret findings from the market research activities undertaken, making suggestions to meet the specific marketing objectives for a start-up business	<b>C.M3</b> Analyse the findings of the market research activities using statistical techniques and comment on confidence levels making detailed suggestions to meet the specific marketing objectives for a start-up business.	
<b>C.P5</b> Present findings from the market research activities in different formats.		

## Essential information for assignments

The recommended structure of assessment is shown in the unit summary with suitable forms of evidence. Further information on setting assignments is given on our website. *Section 6 Internal assessment* gives information on setting assignments.

There is a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.M1, A.D1)

Learning aims: B and C (B.P2, B.P3, C.P4, C.P5, B.M2, C.M3, B.D2, C.D3)

## Further information for teachers and assessors

### Resource requirements

Learners will require access to research facilities so that they can carry out the research needed for the unit.

### Essential information for assessment decisions

#### Learning aim A

**For distinction standard,** learners will select market research methods used by start-up businesses to meet their marketing objectives. Work will be detailed and supported by appropriate examples throughout of how these have been used to make supported and complex decisions.

**For merit standard,** learners will present a careful consideration of the different types of research that can be used by a selected start-up business, including their appropriateness to the start-up business and in meeting the marketing objectives. They will identify which types of research have been most significant, using detailed examples made by the start-up business.

**For pass standard,** learners will show clear details in their report of types of research used by a selected start-up business. It will be fit for purpose, professional and written in appropriate business language. The report will explain at least two primary and two secondary types of research for the start-up business and will use realistic examples.

#### Learning aims B and C

**For distinction standard,** learners will undertake a small-scale market research activity to meet marketing objectives for a start-up business. They will draw on varied information, considering the relevance and limitations of each method. They will make justified recommendations regarding changes that could be made to the market research activity. Research findings will form part of an appendix to the report. Learners will give complex and supported suggestions to meet the specific marketing objectives to the start-up business which will be validated by statistical data.

**For merit standard,** learners will present the outcomes of a detailed examination of the market research activities undertaken and their suitability for meeting the marketing objectives of the start-up business. Learners will also present the outcomes of a methodical examination using statistical techniques including averages, range and trends, commenting on confidence levels. They will also interpret secondary research. Their suggestions to the start-up business on meeting its marketing objectives will be detailed but may miss some elements.

**For pass standard,** learners will undertake a small-scale market research activity to meet marketing objectives for a start-up business. They will carry out both primary and secondary research for the start-up business. At least two methods of each type must be undertaken. They will state the purpose and findings of the market research activities. These will be simplistic but will be enough to inform suggestions that can be made to the start-up business for meeting its marketing objectives. They will present these findings in different formats, including written and graphical.

## Links to other units

This unit links with all other units in the specification.

## Employer involvement

This unit would benefit from employer involvement in the form of:

- guest speakers
- participation in audience assessment of presentations
- design/ideas to contribute to unit assignment/case study/project materials
- work experience
- own business materials as exemplars
- support from local business staff as mentors.

# Unit 13: Corporate Social Responsibility

Level: **3**

Unit type: **Internal**

Guided learning hours: **60**

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## Unit in brief

Learners explore corporate social responsibility issues and plan an initiative to address them.

## Unit introduction

Consumers make informed decisions about who they select to provide the goods and services they use. You will see how demonstrating a strong corporate social image can lead to a competitive advantage. Organisations that respect and care for their stakeholders and the environment in which they operate, and that are also concerned with making the right choices are more likely to be successful in winning and maintaining customers.

In this unit, you will learn how corporate social responsibility (CSR) and ethical behaviour are a growing part of an organisation's success. You will investigate how organisations demonstrate their CSR to different internal and external stakeholder groups, considering the benefits and limitations for an organisation of implementing CSR initiatives. You will then plan your own CSR initiative, which addresses some of the CSR issues identified in an organisation.

This unit will help you to progress to employment in specific CSR roles, which may or may not be marketing related. The unit will also help you to progress to further study in higher education and to professional qualifications in marketing and social sciences.

## Learning aims

In this unit you will:

- A** Explore the CSR issues, initiatives and impacts facing organisations
- B** Explore benefits and limitations for an organisation of implementing CSR initiatives
- C** Plan a CSR initiative for an organisation to address selected issues.

## Summary of unit

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Explore the CSR issues, initiatives and impacts facing organisations	<b>A1</b> CSR and stakeholders <b>A2</b> CSR issues <b>A3</b> CSR initiatives <b>A4</b> CSR impacts	A report evaluating a range of CSR issues, initiatives and impacts undertaken by organisations, including effect on their stakeholders. The report should also include the benefits, limitations and competitive advantage of implementing CSR initiatives and of seeking recognition from external bodies.
<b>B</b> Explore benefits and limitations for an organisation of implementing CSR initiatives	<b>B1</b> Potential benefits of acting responsibly <b>B2</b> Potential limitations from adopting a corporate socially responsible approach <b>B3</b> The costs and benefits of seeking recognition from external bodies	
<b>C</b> Plan a CSR initiative for an organisation to address selected issues	<b>C1</b> Researching CSR <b>C2</b> Organisational areas of CSR <b>A3</b> Planning a CSR initiative	A plan justifying the impact of the CSR initiative on stakeholders for a selected organisation that fully addresses a given brief and the issues faced.



## Content

### Learning aim A: Explore the CSR issues, initiatives and impacts facing organisations

#### A1 CSR and stakeholders

- CSR: an evolving business practice that ensures sustainable development is incorporated in an organisation's business model.
- Purpose of CSR:
  - has a positive impact on social, economic and environmental factors
  - employees and customers are increasingly socially conscious and place a premium on working for and spending money with organisations that prioritise CSR; holding corporations accountable for effecting social change with organisation beliefs, practices and profits
  - improving organisation image
  - building a positive image of brand
  - motivating workforce.
- Key stakeholder groups:
  - owners
  - employees
  - customers
  - suppliers
  - governments
  - national governing bodies (NGBs)
  - local, national and global communities.

#### A2 CSR issues

- Environmental issues, e.g. waste, sustainability, pollution, lifespan of products and usage.
- Ethical and legal issues, e.g.:
  - misleading marketing and false descriptions, inappropriate promotion – reckless and dangerous activities
  - safety – instructions, guidance, age, effect of products on consumer health.
- Supply chain issues, e.g. working conditions, minimum/living wage, restrictive trading practices, environmental impact of sourcing, logistics and distribution practices.
- Social issues, e.g. representation and inclusivity, initiatives and investment, engagement and involvement.

#### A3 CSR initiatives

- Environmental initiatives, e.g. carbon footprint reduction, waste reduction, recycling, sustainability of resources and materials.
- Ethical and legal initiatives, e.g. promoting diversity and inclusion in marketing materials and in workplace practices, transparency with clients and other stakeholders, e.g. labelling, proactive press releases, active in the community, responding to queries openly, transparency in financial matters.
- Supply chain initiatives, e.g. fair treatment and working conditions of employees of key suppliers, minimum/living wage for both own and suppliers' workforce, reducing the environmental impact of sourcing, logistics and distribution practices, ethical trading practices.
- Social initiatives, e.g. donating money, products or services to social causes, donating resources to charities and local community programmes, education, training and support for the community.

#### **A4 CSR impacts**

- Environmental impact: environmentally responsible.
- Ethical and legal impact: compliance.
- Supply chain impact: improved worker conditions and pay.
- Social impact: investment in human resources.

### **Learning aim B: Explore benefits and limitations for an organisation of implementing CSR initiatives**

#### **B1 Potential benefits of acting responsibly**

- Improved public opinion, e.g. impact on customers and other stakeholders.
- Improve customer loyalty/brand image.
- Ability to charge premium prices.
- Enhanced recruitment, motivation and staff retention.
- Benefits to third-party causes.
- Potential cost reduction.
- Potential increase in sales and customer demand.
- Ability to select the best suppliers.

#### **B2 Potential limitations from adopting a corporate socially responsible approach**

- Cost of implementing policies.
- Distraction from core organisation objectives and lowering of operating profits.
- Smaller marketing organisations/agencies/departments less able to operate in a CSR way because of costs.
- Perceived as a 'green washing' exercise with little actual substance.
- Cost versus benefit analysis of CSR.

#### **B3 The costs and benefits of seeking recognition from external bodies**

- Types of bodies, e.g.:
  - Investors in People
  - Business in the Community
  - Fairtrade Foundation
  - FTSE4Good.
- Advantages to the organisation of recognition, e.g. focus, create market and brand value through positive exposure and interest, generate goodwill, improvement in your organisation, reporting progress to stakeholders, reporting progress in promotional activities, gain customer and supplier support, monitor ethics and policies, assist in organisational change.
- Disadvantages to the organisation of recognition, e.g. fees, time, expenses, socialising, external pressures.

### **Learning aim C: Plan a CSR initiative for an organisation to address selected issues**

#### **C1 Researching CSR**

- Primary and secondary.
- Sources of information, e.g.:
  - annual reports
  - media
  - pressure groups
  - company website
  - perception poll
  - social audits.

**C2 Organisational areas of CSR**

- Corporate governance and executive pay, e.g. division of responsibilities, divorce of ownership and control, internal checks and controls such as remuneration committees.
- Financial responsibilities, e.g. paying taxes/tax avoidance, corrupt practices including bribery and fraud, excessive remuneration, severance packages and corporate bonus systems.
- Employment and diversity policies, e.g. representation, diversity, equality, inclusivity, equal opportunities in recruitment, promotion and training.
- Ethical trading practices, e.g. worker welfare, natural resource conservation.
- Environment, e.g. offsetting, conservation, sustainability, reporting environmental impact.

**C3 Planning a CSR initiative**

- CSR brief.
- CSR initiative plan, to include:
  - initiative description and rationale
  - objective
  - budget and time considerations
  - needs case
  - activity
  - sustainability plan
  - impact on stakeholders and addressing issues.

## Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Explore the CSR issues, initiatives and impacts facing organisations</b>		<b>A.D1</b> Evaluate how effectively a selected organisation has responded to CSR issues and whether this response has strengthened their CSR image.
<b>A.P1</b> Explain CSR issues for selected organisations and their stakeholders. <b>A.P2</b> Explain CSR initiatives undertaken for the selected organisations.	<b>A.M1</b> Assess the impact of CSR issues on selected organisations.	
<b>Learning aim B: Explore benefits and limitations for an organisation of implementing CSR initiatives</b>		<b>B.D2</b> Evaluate the competitive advantage gained by a selected organisation as a result of its CSR initiatives.
<b>B.P3</b> Explain potential benefits to a selected organisation of undertaking CSR initiatives. <b>B.P4</b> Explain potential limitations to a selected organisation of undertaking CSR initiatives.	<b>B.M2</b> Assess potential benefits and limitations to a selected organisation of undertaking CSR initiatives.	
<b>Learning aim C: Plan a CSR initiative for an organisation to address selected issues</b>		<b>C.D3</b> Justify the potential impact to the stakeholders of the CSR initiative for a selected organisation.
<b>C.P5</b> Plan a basic CSR initiative in response to a given brief that addresses issues faced by a selected organisation.	<b>C.M3</b> Plan a comprehensive CSR initiative that fully addresses a given brief and the issues faced by a selected organisation.	

## Essential information for assignments

The recommended structure of assessment is shown in the unit summary along with suitable forms of evidence. *Section 6 Internal assessment* gives information on setting assignments and there is further information on our website.

There is a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aims: A and B (A.P1, A.P2, B.P3, B.P4, A.M1, B.M2, A.D1, B.D2)

Learning aim: C (C.P5, C.M3, C.D3)

## Further information for teachers and assessors

### Resource requirements

For this unit, learners will need access to research facilities in order to research CSR materials.

### Essential information for assessment decisions

Organisations could be for-profit, not-for-profit, social enterprises or voluntary organisations. Organisations could be of any size as long as they have CSR policies in place and enable learners to sufficiently meet the requirements of the criteria.

### Learning aims A and B

**For distinction standard,** learners will draw on varied information on how a selected organisation has responded to a range of CSR issues using different initiatives, considering which are most significant. They must reach a conclusion about the success of the response to issues and detail how this has strengthened the organisation's CSR image and improved its competitive advantage across stakeholders.

**For merit standard,** learners will present a careful consideration of environmental, ethical, legal, supply chain and social issues facing organisations and how they affect internal and external stakeholders. Learners will consider the potential benefits and limitations for the selected organisation of undertaking any initiatives they employ to tackle these issues, and a recognition of the role of external bodies, using relevant examples. Their conclusion will consider which benefit and which limitation have had the most impact.

**For pass standard,** learners will show clear details of the issues and initiatives for selected organisations and their stakeholders. Learners will give clear details of individually researched benefits and limitations that cover a range of environmental, ethical, social and supply chain initiatives.

### Learning aim C

**For distinction standard,** learners will present evidence of the potential impact to internal and external stakeholders of a selected, planned CSR initiative. The evidence needs to be detailed and must show extensive research.

**For merit standard,** learners will produce a clear, well-formatted and detailed plan for a CSR initiative using appropriate business language. They will show effective use of a comprehensive range of planning considerations, including a full and detailed budget forecast. This will address all elements of the brief in detail and will fully consider the CSR issues faced by the organisation.

**For pass standard,** learners will produce a simple plan outlining key objectives and planning considerations, including some information on delivery of the CSR initiative and financial planning. There may be some elements missing but the plan addresses the objective of the brief.

## **Links to other units**

This unit links to:

- Unit 1: Careers in Marketing
- Unit 10: Work Experience in Marketing.

## **Employer involvement**

This unit would benefit from employer involvement in the form of:

- guest speakers
- participation in audience assessment of presentations
- design/ideas to contribute to unit assignment/case study/project materials
- work experience
- business materials as exemplars
- support from local business staff as mentors.





## 4 Planning your programme

### How do I choose the right BTEC National qualification for my learners?

BTEC Nationals come in a range of sizes, each with a specific purpose. You will need to assess learners very carefully to ensure that they start on the right size of qualification to fit into their 16–19 study programme, and that they take the right pathways or optional units that allow them to progress to the next stage.

Some learners may want to take a number of complementary qualifications or keep their progression options open. These learners may be suited to taking a BTEC National Extended Certificate. Learners who then decide to continue with a fuller vocational programme can transfer to a BTEC National Diploma or Extended Diploma, for example for their second year.

Some learners are sure of the sector they want to work in and are aiming for progression into that sector via higher education. These learners should be directed to the two-year BTEC National Extended Diploma as the most suitable qualification.

As a centre, you may want to teach learners who are taking different qualifications together. You may also wish to transfer learners between programmes to meet changes in their progression needs. You should check the qualification structures and unit combinations carefully as there is no exact match among the different sizes. You may find that learners need to complete more than the minimum number of units when transferring.

When learners are recruited, you need to give them accurate information on the title and focus of the qualification for which they are studying.

### Is there a learner entry requirement?

As a centre it is your responsibility to ensure that learners who are recruited have a reasonable expectation of success on the programme. There are no formal entry requirements but we expect learners to have qualifications at or equivalent to Level 2.

Learners are most likely to succeed if they have:

- five GCSEs at good grades and/or
- BTEC qualification(s) at Level 2
- achievement in English and mathematics through GCSE or Functional Skills.

Learners may demonstrate ability to succeed in various ways. For example, they may have relevant work experience or may have shown specific aptitude through diagnostic tests or non-educational experience.

### What is involved in becoming an approved centre?

All centres must be approved before they can offer these qualifications – so that they are ready to assess learners and so that we can provide the support that is needed. Further information is given in *Section 8 Quality assurance*.

### What level of sector knowledge is needed to teach these qualifications?

We do not set any requirements for teachers but recommend that centres assess the overall skills and knowledge of the teaching team to ensure that they are relevant and up to date. This will give learners a rich programme to prepare them for employment in the sector.

### What resources are required to deliver these qualifications?

As part of your centre approval you will need to show that the necessary material resources and work spaces are available to deliver BTEC Nationals. For some units, specific resources are required. This is indicated in the units.

## How can myBTEC help with planning for these qualifications?

myBTEC is an online toolkit that supports the delivery, assessment and quality assurance of BTECs in centres. It supports teachers with activities, such as choosing a valid combination of units, creating assignment briefs and creating assessment plans. For further information see *Section 10 Resources and support*.

## Which modes of delivery can be used for these qualifications?

You are free to deliver BTEC Nationals using any form of delivery that meets the needs of your learners. We recommend making use of a wide variety of modes, including direct instruction in classrooms or work environments, investigative and practical work, group and peer work, private study and e-learning.

## What are the recommendations for employer involvement?

### Requirements

As an approved centre you are required to ensure that during their study, every learner has access to meaningful activity involving employers. Involvement should be with employers from the marketing sector and should form a significant part of the delivery or assessment of the qualification. Each centre's approach to employer involvement will be monitored in two ways:

- at centre level in the first term each year as part of the annual quality management review process that addresses centre strategy for delivery, assessment and quality assurance, when we will ask you to show evidence of how employer involvement is provided for all learners. You will need to show evidence in order to gain reporting clearance for certification
- at programme level as part of the standards verification process to confirm that plans for employer involvement meet the requirements of the specification.

These approaches are designed to ensure additional activities can be scheduled where necessary so that learners are not disadvantaged (see *Section 8 Quality assurance*).

We know that the vast majority of programmes already have established links with employers. In order to give you maximum flexibility in creating and strengthening employer involvement, we have not specified a particular level of input from employers.

There are suggestions in many of the units about how employers could become involved in delivery and/or assessment. These suggestions are not exhaustive and there will be other possibilities at local level.

### Definition

Activities that are eligible to be counted as meaningful engagement are:

- structured work experience or work placements that develop skills and knowledge relevant to the qualification
- projects or assessments set with input from industry practitioners
- masterclasses or guest lectures from industry practitioners
- 'expert witness' reports from practitioners that contribute to the assessment of a learner's work.

There may be other ways in which learners can benefit from contact with employers or can prepare for employment, such as listening to careers talks or working in simulated environments. While these provide benefits to learners, they do not count as meaningful engagement.

### Support

It is important that you give learners opportunities that are high quality and which are directly relevant to their study. We will support you in this through our guidance materials and by giving you examples of best practice.

## **What support is available?**

We provide a wealth of support materials, including curriculum plans, delivery guides, authorised assignment briefs, additional papers for external assessments and examples of marked learner work.

You will be allocated a Standards Verifier early on in the planning stage to support you with planning your assessments. There will be extensive training programmes as well as support from our Subject Advisor team.

For further details see *Section 10 Resources and support*.

## **How will my learners become more employable through these qualifications?**

BTEC Nationals in Marketing are mapped to the Level 3 Certificates of the Chartered Institute of Marketing's (CIM), the professional body for marketing.

Employability skills, such as team working and entrepreneurialism, and practical hands-on skills have been built into the design of the learning aims and content. This gives you the opportunity to use relevant contexts, scenarios and materials to enable learners to develop a portfolio of evidence that demonstrates the breadth of their skills and knowledge in a way that equips them for employment.

# 5 Assessment structure and external assessment

## Introduction

BTEC Nationals are assessed using a combination of *internal assessments*, which are set and marked by teachers and externally verified by Pearson, and *external assessments* which are set and marked by Pearson:

- mandatory units have a combination of internal and external assessments
- all optional units are internally assessed.

We have taken great care to ensure that the assessment method chosen is appropriate to the content of the unit and in line with requirements from employers and higher education.

In developing an overall plan for delivery and assessment for the programme, you will need to consider the order in which you deliver units, whether delivery is over short or long periods and when assessment can take place. Some units are defined as synoptic units (see *Section 2 Structure*). Normally, a synoptic assessment is one that a learner would take later in a programme and in which they will be expected to apply learning from a range of units. Synoptic units may be internally or externally assessed. Where a unit is externally assessed you should refer to the sample assessment materials (SAMs) to identify where there is an expectation that learners draw on their wider learning. For internally-assessed units, you must plan the assignments so that learners can demonstrate learning from across their programme. A unit may be synoptic in one qualification and not another because of the relationship it has to the rest of the qualification. These qualifications have internally assessed synoptic units only.

We have addressed the need to ensure that the time allocated to final assessment of internal and external units is reasonable so that there is sufficient time for teaching and learning, formative assessment and development of transferable skills.

In administering internal and external assessment, the centre needs to be aware of the specific procedures and policies that apply, for example to registration, entries and results. An overview with signposting to relevant documents is given in *Section 7 Administrative arrangements*.

## Internal assessment

Our approach to internal assessment for these qualifications will be broadly familiar to experienced centres. It offers flexibility in how and when you assess learners, provided that you meet assessment and quality assurance requirements. You will need to take account of the requirements of the unit format, which we explain in *Section 3 Units*, and the requirements for delivering assessment given in *Section 6 Internal assessment*.

## External assessment

A summary of the external assessment for this qualification is given in *Section 2*. You should check this information carefully, together with the unit specification and the sample assessment materials, so that you can timetable learning and assessment periods appropriately.

Learners must be prepared for external assessment by the time they undertake it. In preparing learners for assessment, you will want to take account of the required learning time, the relationship with other external assessments they may be taking in their programme of study, and opportunities for retaking. Learners may resit an external assessment to obtain a higher grade of Near Pass or above. If a learner has more than one attempt, then the best result will be used for qualification grading, up to the permitted maximum. It is unlikely that learners will need to or benefit from taking all assessments twice so you are advised to plan appropriately.

## Key features of external assessment in marketing

After consultation with stakeholders, we developed *Unit 2: Marketing Principles*. This unit gives learners a foundation to study other units in marketing. They will explore marketing principles and apply them to a variety of contexts. The assessment consists of short- and long-answer questions related to marketing principles.

### Unit

The externally-assessed unit has a specific format which we explain in *Section 3 Units*. The content of the unit will be sampled across external assessments over time, through appropriate papers and tasks. The ways in which learners are assessed are shown through the assessment outcomes and grading descriptors. External assessments are marked and awarded using the grade descriptors. The grades available are Distinction (D), Merit (M), Pass (P) and Near Pass (N). The Near Pass grade gives learners credit below a Pass, where they have demonstrated evidence of positive performance which is worth more than an unclassified result but not yet at the Pass standard.

### Sample assessment materials

The externally-assessed unit has a set of sample assessment materials that accompanies this specification. The SAMs are there to give you an example of what the external assessment will look like in terms of the feel and level of demand of the assessment. In the case of units containing synoptic assessment, the SAMs will also show where learners are expected to select and apply from across the programme.

The SAMs show the range of possible question types that may appear in the actual assessments. They give you a good indication of how the assessments will be structured. While SAMs can be used for practice with learners as with any assessment, the content covered and specific details of the questions asked will change in each assessment.

A copy of each of these assessments can be downloaded from our website. To allow your learners further opportunities for practice, an additional sample of each of the Pearson-set units will be available before the first sitting of the assessment.

## 6 Internal assessment

This section gives an overview of the key features of internal assessment and how you, as an approved centre, can offer it effectively. The full requirements and operational information are given in the *Pearson Quality Assurance Handbook*. All members of the assessment team need to refer to this document.

For BTEC Nationals it is important that you can meet the expectations of stakeholders and the needs of learners by providing a programme that is practical and applied. Centres can tailor programmes to meet local needs and use links with local employers and the wider vocational sector.

When internal assessment is operated effectively it is challenging, engaging, practical and up to date. It must also be fair to all learners and meet national standards.

### Principles of internal assessment

#### Assessment through assignments

For internally-assessed units, the format of assessment is an assignment taken after the content of the unit, or part of the unit if several assignments are used, has been delivered. An assignment may take a variety of forms, including practical and written types. An assignment is a distinct activity completed independently by learners that is separate from teaching, practice, exploration and other activities that learners complete with direction from, and formative assessment by, teachers.

An assignment is issued to learners as an assignment brief with a defined start date, a completion date and clear requirements for the evidence that they need to provide. There may be specific observed practical components during the assignment period. Assignments can be divided into tasks and may require several forms of evidence. A valid assignment will enable a clear and formal assessment outcome based on the assessment criteria.

#### Assessment decisions through applying unit-based criteria

Assessment decisions for BTEC Nationals are based on the specific criteria given in each unit and set at each grade level. To ensure that standards are consistent in the qualification and across the suite as a whole, the criteria for each unit have been defined according to a framework. The way in which individual units are written provides a balance of assessment of understanding, practical skills and vocational attributes appropriate to the purpose of qualifications.

The assessment criteria for a unit are hierarchical and holistic. For example, if an M criterion requires the learner to show 'analysis' and the related P criterion requires the learner to 'explain', then to satisfy the M criterion a learner will need to cover both 'explain' and 'analyse'. The unit assessment grid shows the relationships among the criteria so that assessors can apply all the criteria to the learner's evidence at the same time. In *Appendix 1 Glossary of terms used for internally-assessed units*, we have set out definitions of terms that assessors need to understand.

Assessors must show how they have reached their decisions using the criteria in the assessment records. When a learner has completed all the assessment for a unit then the assessment team will give a grade for the unit. This is given simply according to the highest level for which the learner is judged to have met all the criteria. Therefore:

- to achieve a Distinction, a learner must have satisfied all the Distinction criteria (and therefore the Pass and Merit criteria); these define outstanding performance across the unit as a whole
- to achieve a Merit, a learner must have satisfied all the Merit criteria (and therefore the Pass criteria) through high performance in each learning aim
- to achieve a Pass, a learner must have satisfied all the Pass criteria for the learning aims, showing coverage of the unit content and therefore attainment at Level 3 of the national framework.

The award of a Pass is a defined level of performance and cannot be given solely on the basis of a learner completing assignments. Learners who do not satisfy the Pass criteria should be reported as Unclassified.

### **The assessment team**

It is important that there is an effective team for internal assessment. There are three key roles involved in implementing assessment processes in your centre, each with different interrelated responsibilities – the roles are listed below. Full information is given in the *Pearson Quality Assurance Handbook*.

- The Lead Internal Verifier (the Lead IV) has overall responsibility for the programme, its assessment and internal verification to meet our requirements, record keeping and liaison with the Standards Verifier. The Lead IV registers with Pearson annually. The Lead IV acts as an assessor, supports the rest of the assessment team, makes sure that they have the information they need about our assessment requirements, and organises training, making use of our guidance and support materials.
- Internal Verifiers (IVs) oversee all assessment activity in consultation with the Lead IV. They check that assignments and assessment decisions are valid and that they meet our requirements. IVs will be standardised by working with the Lead IV. Normally, IVs are also assessors but they do not verify their own assessments.
- Assessors set or use assignments to assess learners to national standards. Before taking any assessment decisions, assessors participate in standardisation activities led by the Lead IV. They work with the Lead IV and IVs to ensure that the assessment is planned and carried out in line with our requirements.

### **Effective organisation**

Internal assessment needs to be well organised so that learners' progress can be tracked and so that we can monitor that assessment is being carried out in line with national standards. We support you through, for example, providing training materials and sample documentation. Our online myBTEC service can help support you in planning and record keeping. Further information on using myBTEC can be found in *Section 10 Resources and support* and on our website.

It is particularly important that you manage the overall assignment programme and deadlines to make sure that learners are able to complete assignments on time.

### **Learner preparation**

To ensure that you provide effective assessment for your learners, you need to make sure that they understand their responsibilities for assessment and the centre's arrangements.

From induction onwards, you will want to ensure that learners are motivated to work consistently and independently to achieve the requirements of the qualifications. Learners need to understand how assignments are used, the importance of meeting assignment deadlines and that all the work submitted for assessment must be their own.

You will need to give learners a guide that explains how assignments are used for assessment, how assignments relate to the teaching programme and how learners should use and reference source materials, including what would constitute plagiarism. The guide should also set out your approach to operating assessment, such as how learners must submit work and request extensions.

## Setting effective assignments

### Setting the number and structure of assignments

In setting your assignments, you need to work with the structure of assignments shown in the *Essential information for assignments* section of a unit. This shows the structure of the learning aims and criteria that you must follow, and the recommended number of assignments that you should use. For some units we provide authorised assignment briefs. For all the units we give you suggestions on how to create suitable assignments. You can find these materials along with this specification on our website. In designing your own assignment briefs you should bear in mind the following points.

- The number of assignments for a unit must not exceed the number shown in Essential information for assignments. However, you may choose to combine assignments, for example to create a single assignment for the whole unit.
- You may also choose to combine all or parts of different units into single assignments, provided that all units and all their associated learning aims are fully addressed in the programme overall. If you choose to take this approach, you need to make sure that learners are fully prepared so that they can provide all the required evidence for assessment and that you are able to track achievement in the records.
- A learning aim must always be assessed as a whole and must not be split into two or more tasks.
- The assignment must be targeted to the learning aims but the learning aims and their associated criteria are not tasks in themselves. Criteria are expressed in terms of the outcome shown in the evidence.
- For units containing synoptic assessment, the planned assignments must allow learners to select and apply their learning using appropriate self-management of tasks.
- You do not have to follow the order of the learning aims of a unit in setting assignments but later learning aims often require learners to apply the content of earlier learning aims and they may require learners to draw their learning together.
- Assignments must be structured to allow learners to demonstrate the full range of achievement at all grade levels. Learners need to be treated fairly by being given the opportunity to achieve a higher grade if they have the ability.
- As assignments provide a final assessment, they will draw on the specified range of teaching content for the learning aims. The specified content is compulsory. The evidence for assessment need not cover every aspect of the teaching content as learners will normally be given particular examples, case studies or contexts in their assignments. For example, if a learner is carrying out one practical performance, or an investigation of one organisation, then they will address all the relevant range of content that applies in that instance.

### Providing an assignment brief

A good assignment brief is one that, through providing challenging and realistic tasks, motivates learners to provide appropriate evidence of what they have learned.

An assignment brief should have:

- a vocational scenario – this could be a simple situation or a full, detailed set of vocational requirements that motivates the learner to apply their learning through the assignment
- clear instructions to the learner about what they are required to do, normally set out through a series of tasks
- an audience or purpose for which the evidence is being provided
- an explanation of how the assignment relates to the unit(s) being assessed.



## Forms of evidence

BTEC Nationals have always allowed for a variety of forms of evidence to be used, provided that they are suited to the type of learning aim being assessed. For many units, the practical demonstration of skills is necessary and for others, learners will need to carry out their own research and analysis. The units give you information on what would be suitable forms of evidence to give learners the opportunity to apply a range of employability or transferable skills. Centres may choose to use different suitable forms for evidence to those proposed. Overall, learners should be assessed using varied forms of evidence.

Full definitions of types of assessment are given in *Appendix 1 Glossary of terms used for internally-assessed units*. These are some of the main types of assessment:

- written reports
- projects
- time-constrained practical assessments with observation records and supporting evidence
- recordings of performance
- sketchbooks, working logbooks, reflective journals
- presentations with assessor questioning.

The form(s) of evidence selected must:

- allow the learner to provide all the evidence required for the learning aim(s) and the associated assessment criteria at all grade levels
- allow the learner to produce evidence that is their own independent work
- allow a verifier to independently reassess the learner to check the assessor's decisions.

For example, when you are using performance evidence, you need to think about how supporting evidence can be captured through recordings, photographs or task sheets.

Centres need to take particular care that learners are enabled to produce independent work.

For example, if learners are asked to use real examples, then best practice would be to encourage them to use their own or to give the group a number of examples that can be used in varied combinations.

## Making valid assessment decisions

### Authenticity of learner work

Once an assessment has begun, learners must not be given feedback on progress towards fulfilling the targeted criteria.

An assessor must assess only learner work that is authentic, i.e. learners' own independent work. Learners must authenticate the evidence that they provide for assessment through signing a declaration stating that it is their own work.

Assessors must ensure that evidence is authentic to a learner through setting valid assignments and supervising them during the assessment period. Assessors must take care not to provide direct input, instructions or specific feedback that may compromise authenticity.

Assessors must complete a declaration that:

- the evidence submitted for this assignment is the learner's own
- the learner has clearly referenced any sources used in the work
- they understand that false declaration is a form of malpractice.

Centres can use Pearson templates or their own templates to document authentication.

During assessment, an assessor may suspect that some or all of the evidence from a learner is not authentic. The assessor must then take appropriate action using the centre's policies for malpractice. Further information is given in *Section 7 Administrative arrangements*.

### Making assessment decisions using criteria

Assessors make judgements using the criteria. The evidence from a learner can be judged using all the relevant criteria at the same time. The assessor needs to make a judgement against each criterion that evidence is present and sufficiently comprehensive. For example, the inclusion of a concluding section may be insufficient to satisfy a criterion requiring 'evaluation'.

Assessors should use the following information and support in reaching assessment decisions:

- the Essential information for assessment decisions section in each unit gives examples and definitions related to terms used in the criteria
- the explanation of key terms in Appendix 1: Glossary of terms used for internally-assessed units
- examples of assessed work provided by Pearson
- your Lead IV and assessment team's collective experience, supported by the standardisation materials we provide.

Pass and Merit criteria relate to individual learning aims. The Distinction criteria as a whole relate to outstanding performance across the unit. Therefore, criteria may relate to more than one learning aim (for example A.D1) or to several learning aims (for example DE.D3). Distinction criteria make sure that learners have shown that they can perform consistently at an outstanding level across the unit and/or that they are able to draw learning together across learning aims.

### Dealing with late completion of assignments

Learners must have a clear understanding of the centre policy on completing assignments by the deadlines that you give them. Learners may be given authorised extensions for legitimate reasons, such as illness at the time of submission, in line with your centre policies.

For assessment to be fair, it is important that learners are all assessed in the same way and that some learners are not advantaged by having additional time or the opportunity to learn from others. Therefore, learners who do not complete assignments by your planned deadline or the authorised extension deadline may not have the opportunity to subsequently resubmit.

If you accept a late completion by a learner, then the assignment should be assessed normally when it is submitted using the relevant assessment criteria.

## Issuing assessment decisions and feedback

Once the assessment team has completed the assessment process for an assignment, the outcome is a formal assessment decision. This is recorded formally and reported to learners.

The information given to the learner:

- must show the formal decision and how it has been reached, indicating how or where criteria have been met
- may show why attainment against criteria has not been demonstrated
- must not provide feedback on how to improve evidence
- must be validated by an IV before it is given to the learner.

## Resubmission of improved evidence

An assignment provides the final assessment for the relevant learning aims and is normally a final assessment decision, except where the Lead IV approves one opportunity to resubmit improved evidence based on the completed assignment brief.

The Lead IV has the responsibility to make sure that resubmission is operated fairly. This means:

- checking that a learner can be reasonably expected to perform better through a second submission, for example that the learner has not performed as expected
- making sure that giving a further opportunity can be done in such a way that it does not give an unfair advantage over other learners, for example through the opportunity to take account of feedback given to other learners
- checking that the assessor considers that the learner will be able to provide improved evidence without further guidance and that the original evidence submitted remains valid.

Once an assessment decision has been given to the learner, the resubmission opportunity must have a deadline within 15 working days in the same academic year.

A resubmission opportunity must not be provided where learners:

- have not completed the assignment by the deadline without the centre's agreement
- have submitted work that is not authentic.

## Retake of internal assessment

A learner who has not achieved the level of performance required to pass the relevant learning aims after resubmission of an assignment may be offered a single retake opportunity using a new assignment. The retake may be achieved at a Pass only.

The Lead Internal Verifier must authorise a retake of an assignment only in exceptional circumstances where they believe it is necessary, appropriate and fair to do so. For further information on offering a retake opportunity, you should refer to the *BTEC Centre Guide to Internal Assessment*. We provide information on writing assignments for retakes on our website.

## Planning and record keeping

For internal processes to be effective, an assessment team needs to be well organised and keep effective records. The centre will also work closely with us so that we can quality assure that national standards are being satisfied. This process gives stakeholders confidence in the assessment approach.

The Lead IV must have an assessment plan, produced as a spreadsheet or using myBTEC.

When producing a plan, the assessment team may wish to consider:

- the time required for training and standardisation of the assessment team
- the time available to undertake teaching and carry out assessment, taking account of when learners may complete external assessments and when quality assurance will take place
- the completion dates for different assignments
- who is acting as IV for each assignment and the date by which the assignment needs to be verified
- setting an approach to sampling assessor decisions through internal verification that covers all assignments, assessors and a range of learners
- how to manage the assessment and verification of learners' work so that they can be given formal decisions promptly
- how resubmission opportunities can be scheduled.

The Lead IV will also maintain records of assessment undertaken. The key records are:

- verification of assignment briefs
- learner authentication declarations
- assessor decisions on assignments, with feedback given to learners
- verification of assessment decisions.

Examples of records and further information are given in the *Pearson Quality Assurance Handbook*.

# 7 Administrative arrangements

## Introduction

This section focuses on the administrative requirements for delivering a BTEC qualification. It will be of value to Quality Nominees, Lead IVs, Programme Leaders and Examinations Officers.

## Learner registration and entry

Shortly after learners start the programme of learning, you need to make sure that they are registered for the qualification and that appropriate arrangements are made for internal and external assessment. You need to refer to the *Information Manual* for information on making registrations for the qualification and entries for external assessments.

Learners can be formally assessed only for a qualification on which they are registered. If learners' intended qualifications change, for example if a learner decides to choose a different pathway specialism, then the centre must transfer the learner appropriately.

## Access to assessment

Both internal and external assessments need to be administered carefully to ensure that all learners are treated fairly, and that results and certification are issued on time to allow learners to progress to chosen progression opportunities.

Our equality policy requires that all learners should have equal opportunity to access our qualifications and assessments, and that our qualifications are awarded in a way that is fair to every learner. We are committed to making sure that:

- learners with a protected characteristic are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve for undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational Qualifications*.

## Administrative arrangements for internal assessment

### Records

You are required to retain records of assessment for each learner. Records should include assessments taken, decisions reached and any adjustments or appeals. Further information can be found in the *Information Manual*. We may ask to audit your records so they must be retained as specified.

### Reasonable adjustments to assessment

A reasonable adjustment is one that is made before a learner takes an assessment to ensure that they have fair access to demonstrate the requirements of the assessments. You are able to make adjustments to internal assessments to take account of the needs of individual learners. In most cases this can be achieved through a defined time extension or by adjusting the format of evidence. We can advise you if you are uncertain as to whether an adjustment is fair and reasonable. You need to plan for time to make adjustments if necessary.

Further details on how to make adjustments for learners with protected characteristics are given on our website in the document *Guidance for reasonable adjustment and special consideration in vocational internally-assessed units*.

### Special consideration

Special consideration is given after an assessment has taken place for learners who have been affected by adverse circumstances, such as illness. You must operate special consideration in line with our policy (see previous paragraph). You can provide special consideration related to the period of time given for evidence to be provided or for the format of the assessment if it is equally valid. You may not substitute alternative forms of evidence to that required in a unit, or omit the application of any assessment criteria to judge attainment. Pearson can consider applications for special consideration in line with the policy.

### Appeals against assessment

Your centre must have a policy for dealing with appeals from learners. These appeals may relate to assessment decisions being incorrect or assessment not being conducted fairly. The first step in such a policy could be a consideration of the evidence by a Lead IV or other member of the programme team. The assessment plan should allow time for potential appeals after assessment decisions have been given to learners. If there is an appeal by a learner, you must document the appeal and its resolution. Learners have a final right of appeal to Pearson but only if the procedures that you have put in place have not been followed. Further details are given in the document *Enquiries and appeals about Pearson vocational qualifications and end point assessment policy*.

## Administrative arrangements for external assessment

### Entries and resits

For information on the timing of assessment and entries, please refer to the annual examinations timetable on our website.

### Access arrangements requests

Access arrangements are agreed with Pearson before an assessment. They allow learners with special educational needs, disabilities or temporary injuries to:

- access the assessment
- show what they know and can do without changing the demands of the assessment.

Access arrangements should always be processed at the time of registration. Learners will then know what type of arrangements are available for them.

### Granting reasonable adjustments

For external assessment, a reasonable adjustment is one that we agree to make for an individual learner. A reasonable adjustment is defined for the individual learner and informed by the list of available access arrangements.

Whether an adjustment will be considered reasonable will depend on a number of factors, to include:

- the needs of the learner with the disability
- the effectiveness of the adjustment
- the cost of the adjustment
- the likely impact of the adjustment on the learner with the disability and other learners.

Adjustment may be judged unreasonable and not approved if it involves unreasonable costs, timeframes or affects the integrity of the assessment.

### Special consideration requests

Special consideration is an adjustment made to a learner's mark or grade after an external assessment to reflect temporary injury, illness or other indisposition at the time of the assessment. An adjustment is made only if the impact on the learner is such that it is reasonably likely to have had a material effect on that learner being able to demonstrate attainment in the assessment.

Centres are required to notify us promptly of any learners who they believe have been adversely affected and request that we give special consideration. Further information can be found in the special requirements section on our website.

## **Conducting external assessments**

Centres must make arrangements for the secure delivery of external assessments. External assessments for BTEC qualifications include examinations, set tasks and performance.

Each external assessment has a defined degree of control under which it must take place. Some external assessments may have more than one part and each part may have a different degree of control. We define degrees of control as follows.

### **High control**

This is the completion of assessment in formal invigilated examination conditions.

### **Medium control**

This is completion of assessment, usually over a longer period of time, which may include a period of controlled conditions. The controlled conditions may allow learners to access resources, prepared notes or the internet to help them complete the task.

### **Low control**

These are activities completed without direct supervision. They may include research, preparation of materials and practice. The materials produced by learners under low control will not be directly assessed.

Further information on responsibilities for conducting external assessment is given in the document *Instructions for Conducting External Assessments*, available on our website.



## Dealing with malpractice in assessment

Malpractice means acts that undermine the integrity and validity of assessment, or the certification of qualifications, and/or that may damage the authority of those responsible for delivering the assessment and certification.

Pearson does not tolerate actions (or attempted actions) of malpractice by learners, centre staff or centres in connection with Pearson qualifications. Pearson may impose penalties and/or sanctions on learners, centre staff or centres where incidents (or attempted incidents) of malpractice have been proven.

Malpractice may arise or be suspected in relation to any unit or type of assessment within the qualification. For further details regarding malpractice and advice on preventing malpractice by learners, please see Pearson's *Centre guidance: Dealing with malpractice and maladministration in vocational qualifications*, available on our website.

The procedures we ask you to adopt vary between units that are internally assessed and those that are externally assessed.

### Internally-assessed units

Centres are required to take steps to prevent malpractice and to investigate instances of suspected malpractice. Learners must be given information that explains what malpractice is for internal assessment and how suspected incidents will be dealt with by the centre. The *Centre Guidance: Dealing with Malpractice* document gives full information on the actions we expect you to take.

Pearson may conduct investigations if we believe that a centre is failing to conduct internal assessment according to our policies. The above document gives further information, examples and details the penalties and sanctions that may be imposed.

In the interests of learners and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

### Externally-assessed units

External assessment means all aspects of units that are designated as external in this specification, including preparation for tasks and performance. For these assessments, centres must follow the JCQ procedures set out in the latest version of *JCQ Suspected Malpractice in Examinations and Assessments Policies and Procedures* ([www.jcq.org.uk](http://www.jcq.org.uk)).

In the interests of learners and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

### Learner malpractice

Heads of Centres are required to report incidents of any suspected learner malpractice that occur during Pearson external assessments. We ask that centres do so by completing a *JCQ Form M1* (available at [www.jcq.org.uk/exams-office/malpractice](http://www.jcq.org.uk/exams-office/malpractice)) and emailing it and any accompanying documents (signed statements from the learner, invigilator, copies of evidence, etc.) to the Investigations Team at [candidatemalpractice@pearson.com](mailto:candidatemalpractice@pearson.com). The responsibility for determining appropriate sanctions or penalties to be imposed on learners lies with Pearson.

Learners must be informed at the earliest opportunity of the specific allegation and the centre's malpractice policy, including the right of appeal. Learners found guilty of malpractice may be disqualified from the qualification for which they have been entered with Pearson.

## Teacher/centre malpractice

Heads of Centres are required to inform Pearson's Investigations Team of any incident of suspected malpractice by centre staff, before any investigation is undertaken. Heads of centres are requested to inform the Investigations Team by submitting a *JCQ Form M2(a)* (available at [www.jcq.org.uk/exams-office/malpractice](http://www.jcq.org.uk/exams-office/malpractice)) with supporting documentation to [pqsmalpractice@pearson.com](mailto:pqsmalpractice@pearson.com). Where Pearson receives allegations of malpractice from other sources (for example Pearson staff or anonymous informants), the Investigations Team will conduct the investigation directly or may ask the head of centre to assist.

Incidents of maladministration (accidental errors in the delivery of Pearson qualifications that may affect the assessment of learners) should also be reported to the Investigations Team using the same method.

Heads of Centres/Principals/Chief Executive Officers or their nominees are required to inform learners and centre staff suspected of malpractice of their responsibilities and rights; see Section 6.15 of the *JCQ Suspected Malpractice in Examinations and Assessments Policies and Procedures* document.

Pearson reserves the right in cases of suspected malpractice to withhold the issuing of results and/or certificates while an investigation is in progress. Depending on the outcome of the investigation, results and/or certificates may be released or withheld.

You should be aware that Pearson may need to suspend certification when undertaking investigations, audits and quality assurances processes. You will be notified within a reasonable period of time if this occurs.

## Sanctions and appeals

Where malpractice is proven we may impose sanctions or penalties.

Where learner malpractice is evidenced, penalties may be imposed such as:

- mark reduction for external assessments
- disqualification from the qualification
- being barred from registration for Pearson qualifications for a period of time.

If we are concerned about your centre's quality procedures, we may impose sanctions such as:

- working with you to create an improvement action plan
- requiring staff members to receive further training
- placing temporary blocks on your certificates
- placing temporary blocks on registration of learners
- debarring staff members or the centre from delivering Pearson qualifications
- suspending or withdrawing centre approval status.

The centre will be notified if any of these apply.

Pearson has established procedures for centres that are considering appeals against penalties and sanctions arising from malpractice. Appeals against a decision made by Pearson will normally be accepted only from Heads of Centres (on behalf of learners and/or members of staff) and from individual members (in respect of a decision taken against them personally). Further information on appeals can be found in our *Enquiries and appeals about Pearson vocational qualifications and end point assessment policy*, which is on our website. In the initial stage of any aspect of malpractice, please notify the Investigations Team by email via [pqsmalpractice@pearson.com](mailto:pqsmalpractice@pearson.com) – they will inform you of the next steps.

## Certification and results

Once a learner has completed all the required components for a qualification, even if final results for external assessments have not been issued, the centre can claim certification for the learner, provided that quality assurance has been successfully completed. For the relevant procedures please refer to our *Information Manual*. You can use the information provided on qualification grading to check overall qualification grades.

### Results issue

After the external assessment session, learner results will be issued to centres. The result will be in the form of a grade. You should be prepared to discuss performance with learners, making use of the information we provide and post-results services.

### Post-assessment services

Once results for external assessments are issued, you may find that the learner has failed to achieve the qualification or to attain an anticipated grade. It is possible to transfer or reopen registration in some circumstances. The *Information Manual* gives further information.

### Changes to qualification requests

Where a learner who has taken a qualification wants to resit an externally-assessed unit to improve their qualification grade, you first need to decline their overall qualification grade. You may decline the grade before the certificate is issued. For a learner receiving their results in August, you should decline the grade by the end of September if the learner intends to resit an external assessment.

## Additional documents to support centre administration

As an approved centre, you must ensure that all staff delivering, assessing and administering the qualifications have access to this documentation. These documents are reviewed annually and are reissued if updates are required.

- Pearson Quality Assurance Handbook: this sets out how we will carry out quality assurance of standards and how you need to work with us to achieve successful outcomes.
- Information Manual: this gives procedures for registering learners for qualifications, transferring registrations, entering for external assessments and claiming certificates.
- Lead Examiners' Reports: these are produced after each series for each external assessment and give feedback on the overall performance of learners in response to tasks or questions set.
- Instructions for the Conduct of External Assessments (ICEA): this explains our requirements for the effective administration of external assessments, such as invigilation and submission of materials.
- Regulatory policies: our regulatory policies are integral to our approach and explain how we meet internal and regulatory requirements. We review the regulated policies annually to ensure that they remain fit for purpose. Policies related to this qualification include:
  - adjustments for candidates with disabilities and learning difficulties, access arrangements and reasonable adjustments for general and vocational qualifications
  - age of learners
  - centre guidance for dealing with malpractice
  - recognition of prior learning and process.

This list is not exhaustive – a full list of our regulatory policies can be found on our website.

## 8 Quality assurance

### Centre and qualification approval

As part of the approval process, your centre must make sure that the resource requirements listed below are in place before offering the qualification.

- Centres must have appropriate physical resources (for example, equipment, IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification.
- Staff involved in the assessment process must have relevant expertise and/or occupational experience.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have in place appropriate health and safety policies relating to the use of equipment by learners.
- Centres must deliver the qualification in accordance with current equality legislation.
- Centres should refer to the teacher guidance section in individual units to check for any specific resources required.

### Continuing quality assurance and standards verification

On an annual basis, we produce the *Pearson Quality Assurance Handbook*. It contains detailed guidance on the quality processes required to underpin robust assessment and internal verification.

The key principles of quality assurance are that:

- a centre delivering BTEC programmes must be an approved centre, and must have approval for the programmes or groups of programmes that it is delivering
- the centre agrees, as part of gaining approval, to abide by specific terms and conditions around the effective delivery and quality assurance of assessment; it must abide by these conditions throughout the period of delivery
- Pearson makes available to approved centres a range of materials and opportunities, through online standardisation, intended to exemplify the processes required for effective assessment, and examples of effective standards. Approved centres must use the materials and services to ensure that all staff delivering BTEC qualifications keep up to date with the guidance on assessment
- an approved centre must follow agreed protocols for standardisation of assessors and verifiers, for the planning, monitoring and recording of assessment processes, and for dealing with special circumstances, appeals and malpractice.

The approach of quality-assured assessment is through a partnership between an approved centre and Pearson. We will make sure that each centre follows best practice and employs appropriate technology to support quality-assurance processes, where practicable. We work to support centres and seek to make sure that our quality-assurance processes do not place undue bureaucratic processes on centres. We monitor and support centres in the effective operation of assessment and quality assurance.

The methods we use to do this for BTEC Level 3 include:

- making sure that all centres complete appropriate declarations at the time of approval
- undertaking approval visits to centres
- making sure that centres have effective teams of assessors and verifiers who are trained to undertake assessment
- assessment sampling and verification, through requested samples of assessments, completed assessed learner work and associated documentation
- an overarching review and assessment of a centre's strategy for delivering and quality assuring its BTEC programmes, for example making sure that synoptic units are placed appropriately in the order of delivery of the programme.

Centres that do not fully address and maintain rigorous approaches to delivering, assessing and quality assurance cannot seek certification for individual programmes or for all BTEC Level 3 programmes. An approved centre must make certification claims only when authorised by us and strictly in accordance with requirements for reporting.

Centres that do not comply with remedial action plans may have their approval to deliver qualifications removed.

## 9 Understanding the qualification grade

### Awarding and reporting for the qualification

This section explains the rules that we apply in awarding a qualification and in providing an overall qualification grade for each learner. It shows how all the qualifications in this sector are graded.

The awarding and certification of these qualifications will comply with regulatory requirements.

### Eligibility for an award

In order to be awarded a qualification, a learner must complete all units achieve a Near Pass (N) or above in all external units and a Pass or above in all mandatory units unless otherwise specified. Refer to the structure in *Section 2 Structure*.

To achieve any qualification grade, learners must:

- complete and **have an outcome** (D, M, P, N or U) for all units within a valid combination
- achieve the required units at Pass or above shown in Section 2, and for the Extended Diploma achieve a minimum 900 GLH at Pass or above (or N or above in external units)
- achieve the **minimum number of points** at a grade threshold.

It is the responsibility of a centre to ensure that a correct unit combination is adhered to. Learners who do not achieve the required minimum grade (N or P) in units shown in the structure will not achieve a qualification.

Learners who do not achieve sufficient points for a qualification or who do not achieve all the required units may be eligible to achieve a smaller qualification in the same suite provided they have completed and achieved the correct combination of units and met the appropriate qualification grade points threshold.

### Calculation of the qualification grade

The final grade awarded for a qualification represents an aggregation of a learner's performance across the qualification. As the qualification grade is an aggregate of the total performance, there is some element of compensation in that a higher performance in some units may be balanced by a lower outcome in others.

In the event that a learner achieves more than the required number of optional units, the mandatory units along with the optional units with the highest grades will be used to calculate the overall result, subject to the eligibility requirements for that particular qualification title.

BTEC Nationals are Level 3 qualifications and are awarded at the grade ranges shown in the table below.

Qualification	Available grade range
Certificate, Extended Certificate, Foundation Diploma	P to D*
Diploma	PP to D*D*
Extended Diploma	PPP to D*D*D*

The *Calculation of qualification grade* table, shown further on in this section, shows the minimum thresholds for calculating these grades. The table will be kept under review over the lifetime of the qualification. The most up-to-date table will be issued on our website.

Pearson will monitor the qualification standard and reserves the right to make appropriate adjustments.

Learners who do not meet the minimum requirements for a qualification grade to be awarded will be recorded as Unclassified (U) and will not be certificated. They may receive a Notification of Performance for individual units. The *Information Manual* gives full information.

### Points available for internal units

The table below shows the number of **points** available for internal units. For each internal unit, points are allocated depending on the grade awarded.

	Unit size		
	60 GLH	120 GLH	180 GLH
U	0	0	0
Pass	6	12	18
Merit	10	20	30
Distinction	16	32	48

### Points available for external units

Raw marks from the external units will be awarded **points** based on performance in the assessment. The table below shows the **minimum number of points** available for each grade in the external units.

	Unit size
	120 GLH
U	0
Near Pass	8
Pass	12
Merit	20
Distinction	32

Pearson will automatically calculate the points for each external unit once the external assessment has been marked and grade boundaries have been set. For more details about how we set grade boundaries in the external assessment, please go to our website.

### Claiming the qualification grade

Subject to eligibility, Pearson will automatically calculate the qualification grade for your learners when the internal unit grades are submitted and the qualification claim is made. Learners will be awarded qualification grades for achieving the sufficient number of points within the ranges shown in the relevant *Calculation of qualification grade* table for the cohort.

## Calculation of qualification grade

Applicable for registration from 1 September 2020.

The table is subject to review over the lifetime of the qualification. The most up-to-date version will be issued on our website.

Extended Certificate		Diploma		Extended Diploma	
360 GLH		720 GLH		1080 GLH	
Grade	Points threshold	Grade	Points threshold	Grade	Points threshold
U	0	U	0	U	0
Pass	36	PP	72	PPP	108
		MP	88	MPP	124
				MMP	140
Merit	52	MM	104	MMM	156
		DM	124	DMM	176
				DDM	196
Distinction	74	DD	144	DDD	216
		D*D	162	D*DD	234
				D*D*D	252
Distinction*	90	D*D*	180	D*D*D*	270

## Examples of grade calculations based on table applicable to registrations from September 2019

### Example 1: Achievement of an Extended Certificate with a P grade

	GLH	Type (Int/Ext)	Grade	Unit points
Unit 1	60	Int	Pass	6
Unit 2	120	Ext	Pass	12
Unit 3	180	Int	Pass	18
<b>Totals</b>	<b>360</b>		<b>P</b>	<b>36</b>

The learner has sufficient points for a P grade.

### Example 2: Achievement of an Extended Certificate with an M grade

	GLH	Type (Int/Ext)	Grade	Unit points
Unit 1	60	Int	Pass	6
Unit 2	120	Ext	Distinction	32
Unit 3	180	Int	Pass	18
<b>Totals</b>	<b>360</b>		<b>M</b>	<b>56</b>

The learner has sufficient points for an M grade.

### Example 3: An Unclassified result for an Extended Certificate

	GLH	Type (Int/Ext)	Grade	Unit points
Unit 1	60	Int	Pass	6
Unit 2	120	Ext	Unclassified	0
Unit 3	180	Int	Pass	18
<b>Totals</b>	<b>360</b>		<b>U</b>	<b>24</b>

The learner has a U in Unit 2.

The learner has not met the minimum requirement for a P or higher in Units 1, 2 and 3.



## Examples of grade calculations based on table applicable to registrations from September 2019

### Example 1: Achievement of a Diploma with a PP grade

	GLH	Type (Int/Ext)	Grade	Unit points
Unit 1	60	Int	Pass	6
Unit 2	120	Ext	Pass	12
Unit 3	180	Int	Pass	18
Unit 4	180	Int	Pass	18
Unit 5	60	Int	Pass	6
Unit 6	60	Int	Pass	6
Unit 8	60	Int	Pass	6
<b>Totals</b>	<b>720</b>		<b>PP</b>	<b>72</b>

The learner has sufficient points for a PP grade.

### Example 2: Achievement of a Diploma with a DM grade

	GLH	Type (Int/Ext)	Grade	Unit points
Unit 1	60	Int	Distinction	16
Unit 2	120	Ext	Distinction	32
Unit 3	180	Int	Pass	18
Unit 4	180	Int	Pass	18
Unit 5	60	Int	Distinction	16
Unit 6	60	Int	Distinction	16
Unit 8	60	Int	Distinction	16
<b>Totals</b>	<b>720</b>		<b>DM</b>	<b>132</b>

The learner has sufficient points for a DM grade.

### Example 3: An Unclassified result for a Diploma

	GLH	Type (Int/Ext)	Grade	Unit points
Unit 1	60	Int	Pass	6
Unit 2	120	Ext	Pass	12
Unit 3	180	Int	Pass	18
Unit 4	180	Int	Pass	18
Unit 5	60	Int	Pass	6
Unit 6	60	Int	Pass	6
Unit 8	60	Int	Unclassified	0
<b>Totals</b>	<b>720</b>		<b>U</b>	<b>66</b>

The learner has met the minimum requirement for P or higher in Units 1, 2, 3, 4, 5 and 6, but has insufficient points for a PP grade.

## Examples of grade calculations based on table applicable to registrations from September 2019

### Example 1: Achievement of an Extended Diploma with a PPP grade

	GLH	Type (Int/Ext)	Grade	Unit points
Unit 1	60	Int	Pass	6
Unit 2	120	Ext	Pass	12
Unit 3	180	Int	Pass	18
Unit 4	180	Int	Pass	18
Unit 5	60	Int	Pass	12
Unit 6	60	Int	Pass	6
Unit 7	180	Int	Pass	6
Unit 8	60	Int	Pass	6
Unit 9	60	Int	Pass	6
Unit 10	60	Int	Pass	6
Unit 11	60	Int	Pass	6
Unit 12	60	Int	Pass	6
<b>Totals</b>	<b>1080</b>		<b>PPP</b>	<b>108</b>

The learner has sufficient points for a PPP grade.

### Example 2: Achievement of an Extended Diploma with a DDM grade

	GLH	Type (Int/Ext)	Grade	Unit points
Unit 1	60	Int	Distinction	16
Unit 2	120	Ext	Distinction	32
Unit 3	180	Int	Pass	18
Unit 4	180	Int	Pass	18
Unit 5	60	Int	Pass	6
Unit 6	60	Int	Distinction	16
Unit 7	180	Int	Distinction	16
Unit 8	60	Int	Distinction	16
Unit 9	60	Int	Distinction	16
Unit 10	60	Int	Distinction	16
Unit 11	60	Int	Distinction	16
Unit 12	60	Int	Distinction	16
<b>Totals</b>	<b>1080</b>		<b>DDM</b>	<b>202</b>

The learner has sufficient points for a DDM grade.

### Example 3: An Unclassified result for an Extended Diploma

	GLH	Type (Int/Ext)	Grade	Unit points
Unit 1	60	Int	Pass	6
Unit 2	120	Ext	Pass	12
Unit 3	180	Int	Merit	30
Unit 4	180	Int	Merit	30
Unit 5	60	Int	Pass	6
Unit 6	60	Int	Pass	6
Unit 7	180	Int	Pass	18
Unit 8	60	Int	Unclassified	0
Unit 9	60	Int	Unclassified	0
Unit 10	60	Int	Unclassified	0
Unit 11	60	Int	Unclassified	0
Unit 12	60	Int	Unclassified	0
<b>Totals</b>	<b>1080</b>		<b>U</b>	<b>108</b>

The learner has 300 GLH at U.

The learner has sufficient points for a PPP grade but has not met the minimum requirement for 900 GLH at Pass or above.

# 10 Resources and support

Our aim is to give you a wealth of resources and support to enable you to deliver BTEC National qualifications with confidence. On our website you will find a list of resources to support teaching and learning, and professional development.

## Support for setting up your course and preparing to teach

### Specification

This specification (for teaching from September 2019) includes details on the administration of qualifications and information on all the units for the qualification.

### Delivery Guide

This free guide gives you important advice on how to choose the right course for your learners and how to ensure you are fully prepared to deliver the course. It explains the key features of BTEC Nationals (for example, employer involvement and employability skills). It also covers guidance on assessment (internal and external) and quality assurance. The guide tells you where you can find further support and gives detailed, unit-by-unit delivery guidance. It includes teaching tips and ideas, assessment preparation and suggestions for further resources.

### Schemes of work

Free sample schemes of work are provided for each mandatory unit. These are available in Word™ format for ease of customisation.

### Curriculum models

These show how the BTECs in the suite fit into a 16–19 study programme, depending on their size and purpose. The models also show where other parts of the programme, such as work experience, maths and English, tutorial time and wider study, fit alongside the programme.

### Study skills activities

A range of case studies and activities is provided; these are designed to help learners develop the study skills they need to successfully complete their BTEC course. The case studies and activities are provided in Word™ format for easy customisation.

### myBTEC

myBTEC is a free, online toolkit that lets you plan and manage your BTEC provision from one place. It supports the delivery, assessment and quality assurance of BTECs in centres and supports teachers with the following activities:

- checking that a programme is using a valid combination of units
- creating and verifying assignment briefs (including access to a bank of authorised assignment briefs that can be customised)
- creating assessment plans and recording assessment decisions
- tracking the progress of every learner throughout their programme.

To find out more about myBTEC, visit the myBTEC page on the support services section of our website. We will add the new BTEC National specifications to myBTEC as soon as possible.

## Support for teaching and learning

Pearson Learning Services provides a range of engaging resources to support BTEC Nationals, including:

- textbooks in e-book and print formats
- revision guides and revision workbooks in e-book and print formats
- teaching and assessment packs, including e-learning materials via the Active Learn Digital Service.

Teaching and learning resources are also available from a number of other publishers. Details of Pearson's own resources and of all endorsed resources can be found on our website.

## Support for assessment

### Sample assessment materials for externally-assessed units

Sample assessments are available for the Pearson-set units. One copy of each of these assessments can be downloaded from the website/available in print. For each suite, an additional sample for one of the Pearson-set units is available, allowing your learners further opportunities for practice.

Further sample assessments will be made available through our website on an ongoing basis.

### Sample assessment materials for internally-assessed units

We do not prescribe the assessments for the internally-assessed units. Rather, we allow you to set your own, according to your learners' preferences and to link with your local employment profile.

We do provide a service in the form of Authorised Assignment Briefs, which are approved by Pearson Standards Verifiers. They are available via our website or free on myBTEC.

### Sample marked learner work

To support you in understanding the expectation of the standard at each grade, examples of marked learner work at PM/MD grades are linked to the Authorised Assignment Briefs.

## Training and support from Pearson

### People to talk to

There are many people who are available to support you and provide advice and guidance on delivery of your BTEC Nationals. These include:

- Subject Advisors – available for all sectors. They understand all Pearson qualifications in their sector and so can answer sector-specific queries on planning, teaching, learning and assessment
- Standards Verifiers – they can support you with preparing your assignments, ensuring that your assessment plan is set up correctly, and support you in preparing learner work and providing quality assurance through sampling
- Curriculum Development Managers (CDMs) – they are regionally based and have a full overview of the BTEC qualifications and of the support and resources that Pearson provides. CDMs often run network events
- Customer Services – the 'Support for You' section of our website gives the different ways in which you can contact us for general queries. For specific queries, our service operators can direct you to the relevant person or department.

### Training and professional development

Pearson provides a range of training and professional development events to support the introduction, delivery, assessment and administration of BTEC National qualifications. These sector-specific events, developed and delivered by specialists, are available both face to face and online.

#### 'Getting Ready to Teach'

These events are designed to get teachers ready for delivery of the BTEC Nationals. They include an overview of the qualifications' structures, planning and preparation for internal and external assessment, and quality assurance.

#### Teaching and learning

Beyond the 'Getting Ready to Teach' professional development events, there are opportunities for teachers to attend sector- and role-specific events. These events are designed to connect practice to theory; they provide teacher support and networking opportunities with delivery, learning and assessment methodology.

Details of our training and professional development programme can be found on our website.





## Appendix 1: Glossary of terms used for internally-assessed units

This is a summary of the key terms used to define the requirements in the units.

Term	Definition
Analyse	<p>Learners present the outcome of methodical and detailed examination:</p> <ul style="list-style-type: none"> <li>• breaking down a theme, topic or situation in order to interpret and study the interrelationships between the parts, and/or</li> <li>• of information or data to interpret and study key trends and interrelationships.</li> </ul> <p>Analysis could be through activity, practice, written or verbal presentation.</p>
Assess	<p>Learners present a careful consideration of varied factors or events that apply to a specific situation, or identify those which are the most important or relevant and arrive at a conclusion.</p>
Carry out	<p>Learners demonstrate skills through practical activities, carrying out or executing what has to be done in line with certain requirements. Learners do this in order to complete an identified activity or to demonstrate personal achievement for an audience.</p>
Compare	<p>Learners identify the main factors relating to two or more items/situations or aspects of a subject and explain the similarities, differences, advantages and disadvantages. This is used to show depth of knowledge through selection of characteristics.</p>
Complete	<p>Learners make or do all the necessary parts in order to finish a task.</p>
Create	<p>Learners bring something into existence, e.g. itineraries, plans or proposals.</p>
Demonstrate	<p>Learners' work, performance or practice shows the ability to carry out and apply knowledge, understanding and/or skills in a practical situation.</p>
Design	<p>Learners apply skills and knowledge to the process of deciding on the form, function and characteristics of a product, service or process.</p>
Develop	<p>Learners acquire and apply skills and understanding through practical activities that involve the use of concepts, processes or techniques to expand or progress something.</p>
Evaluate	<p>Learners' work draws on varied information, themes or concepts to consider aspects such as:</p> <ul style="list-style-type: none"> <li>• strengths or weaknesses</li> <li>• advantages or disadvantages</li> <li>• alternative actions</li> <li>• relevance or significance.</li> </ul> <p>Learners' enquiries should lead to a supported judgement showing relationship to its context. This will often be in a conclusion.</p> <p>Evidence will often be written but could be through presentation or activity.</p>

<b>Term</b>	<b>Definition</b>
Examine	Learners select and apply knowledge to less familiar contexts.
Explain	Learners provide detail and reasons and/or evidence to support an opinion, view or argument.
Explore	Learners apply their skills and/or knowledge in contexts involving practical research or investigation.
Identify	Learners indicate the main features or purpose of something by recognising it, locating it and/or being able to discern and understand facts or qualities, e.g. a geographical feature or destination on a map.
Interpret	Learners state the meaning, purpose or qualities of something through the use of images, words or other expressions.
Investigate	Learners' application of knowledge is based on personal research and development.
Justify	Learners give reasons or evidence to: <ul style="list-style-type: none"> <li>• support an opinion, or</li> <li>• prove something right or reasonable.</li> </ul>
Outline	Learners' work, performance or practice provides a summary, overview or brief description of something.
Participate	Learners take part in a practical activity in order to demonstrate knowledge and/or skills in relation to a specific task or context.
Plan	Learners create a way of carrying out a task or series of tasks to achieve specific requirements or objectives, showing progress from start to finish or progress within specified points in the task(s).
Plot	Using maps and/or plans, diagrams and charts with multiple points, learners apply knowledge and/or skills to accurately identify and/or show the relationship between specific points or items.
Prepare	Learners gather materials, information, techniques and/or procedures in readiness to undertake a process and/or make something ready for use.
Produce	Learners' knowledge, understanding and/or skills are applied to develop a particular type of evidence, for example a proposal, plan, product, service or report.
Recommend/make recommendations	Learners suggest a particular action(s) that should be done.
Reflect (on)	Learners consider their own performance and/or skills and development in relation to a specific scenario or scenarios and/or wider context(s). This may include feedback from others. There is often a requirement for learners to identify strengths and areas for improvement, along with a personal development or action plan.
Research	Learners proactively seek information from primary and secondary sources.

<b>Term</b>	<b>Definition</b>
Review	Learners make a formal assessment. They appraise existing information, or prior events, or reconsider information with the intention of making changes if necessary. This may or may not be in the context of own learning and skills development.
Understand	Learners demonstrate knowledge related to defined situations.

This is a key summary of the types of evidence used for BTEC Nationals.

<b>Type of evidence</b>	<b>Definition and purpose</b>
Article	Information on a specified topic or related topics, usually based on information gathered during relevant research and presented in a format that considers the requirements of a specified audience, using appropriate tone, language and structure. Examples could include creating content for a newspaper, magazine, journal or website.
Bibliography using Harvard Referencing System	A detailed list of books and other sources used by learners as part of their research, which have been incorporated into their work. Sources include: published resources, textbooks, the internet, journal articles and trade magazines. Learners should refer to the most current resources available. In-text citations should be included, together with a comprehensive bibliography at the end of the document.  Harvard in-text referencing requires learners to indicate both the author's surname and the date in brackets, either immediately after the reference or directly at the end of the sentence.
Case study	A specific example to which all learners must select and apply knowledge. Used to show application to a realistic context where direct experience cannot be gained.
Costing/financial costing	Information that is presented in an appropriate financial format, detailing the estimated cost of doing or producing something, e.g. a travel itinerary or an event.
Development log	A record kept by learners to show the process of development. Used to show method, self-management and skill(s) development.
Email	A communication that gives information and is written using appropriate technology for a defined purpose in a task or activity.
Guide	Information presented in written or other forms, e.g. diagrams, charts, slideshows, video clips. Offers information and/or advice to a particular audience on a specified subject or issue, e.g. destination guide.
Independent research	An analysis of substantive research organised by learners from secondary and, if applicable, primary sources.

Type of evidence	Definition and purpose
Individual project	A self-directed, large-scale activity requiring planning, research, exploration, outcome and review. Used to show self-management, project management and/or deep learning, including synopticity.
Itinerary	A structured travel document giving a range of details and information with dates, times and places.
Letter	Written communication for a defined purpose in a task or activity. Usually the letter is required to meet stipulated criteria in terms of structure and/or format and level of formality.
Logbook/journal	Completion of a log or journal, usually in the context of work experience in order to record skills, knowledge and understanding acquired for employability. Also used to record reflective accounts and plan for personal and professional development. Learners must keep all other relevant evidence, including witness statements and observation records, with their logs.
Observation record/statement/sheet	Used to provide a formal record of a judgement of learners' performance (e.g. during presentations, practical activities) against the targeted assessment criteria. It must be completed by the assessor of the unit or qualification. An observation record alone does not confer an assessment decision.
Personal development plan/personal skills development plan	A plan produced by learners to record, evaluate and act on areas of strength and weakness. Specific actions to improve knowledge and/or skills will be included in the plan, along with goals and ways of measuring progress.
Personal/professional development portfolio	A record kept by learners to show their process of personal and/or professional development. Used to show method, self-management and skill(s) development to meet required outcomes for assessment purposes.
Plan	Learners produce a plan as an outcome related to a specific or limited task/series of tasks that require(s) learners to achieve specified requirements or objectives.
Presentation	Learners provide information and/or an item(s). The presentation may be given through oral or practical demonstration to a specified audience and goal, often using visual slides or other visual aids to show information.
Portfolio	A collection of documents or other forms of information that demonstrate knowledge-based skills and work that has been undertaken to be assessed as evidence to meet required skills outcomes.
Poster/leaflet	Documents providing well-presented information for a specified purpose.

Type of evidence	Definition and purpose
Professional supporting documentation	Documents such as letters, emails, spreadsheets or memos that are produced by learners to support another item of evidence, e.g. a proposal, costing, itinerary or plan. The supporting documents usually provide contextual or additional information such as an introduction, rationale or timeframe for the other item of evidence.
Proposal	<p>A plan that defines and outlines something to be designed and/or developed and/or implemented. The proposal usually also outlines the methods/processes/procedures and resources required in order to achieve a desired objective/outcome.</p> <p>A research proposal outlines details of an issue to be investigated and how the research will be conducted. It also includes a plan that needs to be designed to set targets, monitor progress and help ensure that the aims of the research project are achieved.</p>
Reference list	A detailed list of books and other sources referred to during learners' research.
Report	Learners adhere to protocols, codes and conventions in setting out findings or judgements in an objective way. A formal report will adhere to a given structure, making use of headings and sub-headings, e.g. a heading, introduction, findings, conclusion and recommendations.
Research portfolio	A collection of documents or other forms of information that demonstrate knowledge-based skills and enquiry work that has been undertaken to be assessed as evidence to meet required skills outcomes. The research portfolio contains evidence of primary and/or secondary research.
Resource portfolio	A collection of relevant documents or other forms of information on a specified issue or number of specified issues. The production of the resource portfolio could be a stand-alone task or inform another task that is to be carried out, e.g. a presentation, plan or proposal.
Role play/simulated activity	A multi-faceted activity simulating realistic work situations.
Teacher observation	Used to provide a formal record of a judgement of learners' performance (e.g. during presentations, practical activities and role play) against the targeted assessment criteria. It must be completed by the assessor of the unit or qualification. An observation record alone does not confer an assessment decision.

<b>Type of evidence</b>	<b>Definition and purpose</b>
Witness statement(s)	Used to provide a written record of learners' performance against targeted assessment criteria, often (but not exclusively) in the context of work experience. Any competent person who has witnessed the skills being demonstrated can complete a witness statement, including staff who do not have direct knowledge of the qualification, unit or evidence requirements but who are able to make a professional judgement about learners' performance in a given situation.



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