

BTEC Level 2 Technical Certificate in
MARKETING



SPECIFICATION

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ISSUE 2



Pearson BTEC Level 2 Technical Certificate in Marketing

Specification

Issue 2

Edexcel, BTEC and LCCI qualifications

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This specification is Issue 2. Key changes are listed in the summary table on the page after next of the document. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

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Welcome

With a track record built over 30 years of learner success, BTEC qualifications are widely recognised and respected. They provide progression to the workplace, either directly or via study at higher levels. Proof comes from YouGov research, which shows that 62% of large companies have recruited employees with BTEC qualifications.

Why are BTECs so successful?

BTECs embody a fundamentally learner-centred approach to the curriculum, with a flexible, unit-based structure. In these new BTEC Level 2 Technicals, the focus is on the development of technical, practical and transferable work-related skills, and sector-specific knowledge. The development of these skills is key for learners to progress to work or to an Apprenticeship. When creating the BTEC Level 2 Technicals, we worked with employers to ensure that the qualifications meet their needs. Employers are looking for recruits with the appropriate technical knowledge, and technical and transferable skills essential for employment.

The BTEC Level 2 Technicals meet these requirements through:

- a range of occupationally-related qualifications, each with a clear purpose, so that there is a qualification to suit each learner's plan for career progression
- up-to-date content that is closely aligned with employers' needs for a skilled future workforce
- assessments chosen to help learners progress to the next stage. This means that some assessments are set by the centre to meet local needs, while others are set and marked by Pearson. This ensures that there is a core of skills and understanding common to all learners. For example, an externally-set 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 tutors have the best possible experience during their course. See *Section 11 Resources and support* for details of the support we offer.

A word to learners...

BTEC Level 2 Technicals will demand a lot of practical work from you. You will need to:

- complete a range of units
- be organised
- take some assessments that Pearson will set and mark
- take other assessments that will demonstrate your technical and practical skills
- 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 go on to work or to an Apprenticeship – success in your BTEC Level 2 Technical qualification will help you to progress to the next stage in your life.

Good luck, and we hope you enjoy your course.

Collaborative development

Learners completing their BTEC Level 2 Technicals will be aiming to go on to employment or to an Apprenticeship. It was essential, therefore, that we developed these qualifications in close collaboration with experts from professional bodies and businesses, and with the providers who will be delivering the qualifications. We are grateful to all the further education lecturers, tutors, employers, professional body representatives and other individuals who have generously shared their time and expertise to help us develop these new qualifications.

Employers and professional bodies that have worked with us include:

- Chartered Institute for Procurement and Supply (CIPS)
- Chartered Institute of Marketing (CIM)
- Infrared
- Kramp.

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

Summary of Pearson BTEC Level 2 Technical Certificate in Marketing specification Issue 2 changes

Summary of changes made between previous issues and this current issue	Page number
Removal of reference to the Data Protection Act 1998	Page 55

Contents

Pearson BTEC Level 2 Technicals	1
Introduction	1
1 Pearson BTEC Level 2 Technical Certificate in Marketing	2
Purpose	2
Who is the qualification for?	2
What does the qualification cover?	2
What could this qualification lead to?	2
About the marketing sector	2
2 Structure	3
Total Qualification Time (TQT)	3
Qualification structure	3
Qualification and unit content	4
Assessment	4
Language of assessment	5
Grading of the qualification	5
Employer involvement	6
3 Units	7
Understanding your units	7
Units	11
4 Planning your programme	65
Is there a learner entry requirement?	65
What is involved in becoming an approved centre?	65
What level of sector knowledge is needed to deliver this qualification?	65
What resources are required to deliver this qualification?	65
What makes good vocational teaching?	65
What are the requirements for meaningful employer involvement?	66
What support is available for delivery and assessment?	66
How will my learners become more employable through this qualification?	66
5 Assessment structure	67
6 Internal assessment	68
Principles of internal assessment	68
Operating internal assessment	68
Setting assignments	69
Making valid assessment decisions	71
7 External assessment	74
Sample assessment materials	74
Conducting external assessments	75

8	Administrative arrangements	76
	Introduction	76
	Learner registration and entry	76
	Access to assessment	76
	Administrative arrangements for internal assessment	77
	Administrative arrangements for external assessment	78
	Dealing with malpractice in assessment	79
	Certification and results	81
	Additional documents to support centre administration	81
9	Quality assurance	82
	Centre and qualification approval	82
	Continuing quality assurance and standards verification	82
10	Understanding the qualification grade	84
	Awarding and reporting for the qualification	84
	Eligibility for an award	84
	Examples of grade calculations based on table applicable to registrations from September 2018	87
11	Resources and support	88
	Support for setting up your course and preparing to teach	88
	Support for teaching and learning	88
	Support for assessment	88
	Training and support from Pearson	89

Pearson BTEC Level 2 Technicals

Introduction

BTEC Level 2 Technicals are intermediate qualifications for post-16 learners who want to specialise in a specific occupation, occupational area or technical role. They prepare learners for work or an Apprenticeship by giving them the opportunity to develop sector-specific knowledge, technical and practical skills, and to apply these skills in work-related environments. The qualifications also provide progression to Level 3 Tech Level qualifications.

Developed in close conjunction with leading employers, BTEC Level 2 Technicals develop transferable workplace skills, such as good communication and the ability to work in a team, which employers have identified as essential for gaining employment in the sector and for progression once the learner is working.

At the core of these qualifications is the concept of preparing young people for the working world. Through practical activities and occupationally-fit-for-purpose assessments, learners will gain the skills and behaviours needed for sustainable employment.

BTEC Level 2 Technicals are designed to be used flexibly, depending on their size and scope:

- as part of a full-time 16–19 study programme, alongside mathematics and English GCSEs and/or Functional Skills, work placement and enrichment activities
- as the technical qualification within an Apprenticeship or off-the-job training for those already in work
- as a roll-on, roll-off programme for those entering an Apprenticeship or employment.

Pearson has developed the BTEC Level 2 Technicals suite to meet the Department for Education (DfE) requirements for qualifications to be offered as Technical Certificates for 16–19-year-olds.

This specification contains the information you need to deliver the Pearson BTEC Level 2 Technical Certificate in Marketing (QN 603/1900/8). The specification signposts you to additional handbooks and policies. It includes all the units for this qualification.

1 Pearson BTEC Level 2 Technical Certificate in Marketing

Purpose

Who is the qualification for?

This qualification is for learners who want to start a career in marketing. It is designed for post-16 learners and can be taken as part of a wider study programme. It is an ideal qualification for learners intending to progress to direct employment in marketing or to a marketing Apprenticeship.

What does the qualification cover?

The qualification has been developed in consultation with employers in the marketing sector. This means that it will enable learners to develop the skills and behaviours that give them the best opportunity to be successful in applying for work.

All the content of the qualification is mandatory and relates directly to the skills, knowledge and behaviours expected by employers in the marketing sector. The areas learners will cover include:

- marketing in business
- research the marketing of a product or service
- create digital marketing communications
- plan and present a marketing campaigning.

Learners will also cover broader skills in literacy and numeracy, which will help them to progress. Learners will develop other transferable technical and practical skills in communication (working with colleagues and customers), and research and project work (giving them the opportunity to show reflective practice by suggesting different approaches to solving a problem).

What could this qualification lead to?

Achieving this qualification will give learners an advantage when applying for a job in marketing. The types of jobs they will be ready for are:

- marketing and branding assistant
- marketing and communications assistant
- sales executive
- sales agent
- sales associate.

The qualification gives learners a sound basis to progress to a Level 3 qualification, when studied in a full study programme.

About the marketing sector

Marketing is essential to the success of all businesses in the UK, whether they are making products or offering services. Businesses range in size from one employee to thousands of employees. The roles within marketing are varied and include the process of researching initial product and service concepts to their development, advertising and digital marketing, including relationship management of customers. There are also specialist marketing agencies that businesses may use to support their marketing activities. These marketing agencies are part of the business services sector.

2 Structure

Total Qualification Time (TQT)

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 tutors 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 tutors or assessors will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

The Pearson BTEC Level 2 Technical Certificate in Marketing is a qualification that has:

- Total Qualification Time: 300 hours
- Guided Learning: 240 hours.

Centres should take note of these hours in planning their programme but should also use their professional judgement to determine the provision of guided learning and study time across the units.

Qualification structure

Learners are required to complete and achieve all the units included in this qualification.

Pearson BTEC Level 2 Technical Certificate in Marketing				
Unit number	Unit title	GLH	Type	How assessed
1	Marketing in Business	60	Mandatory	External
2	Research the Marketing of a Product or Service	60	Mandatory	Internal
3	Create Digital Marketing Communications	60	Mandatory	Internal
4	Plan and Present a Marketing Campaign	60	Mandatory	Internal synoptic

This qualification has 100% mandatory content and 25% external assessment.

Qualification and unit content

Pearson has developed the content of this qualification in collaboration with employers and representatives from relevant professional bodies and further education providers. The content has been aligned to the Marketing National Occupational Standards. In this way, we have ensured that content is up to date and that it includes the knowledge, technical and practical skills and behaviours required to work in the sector and occupational area.

All units in this qualification are mandatory, which provides a balance of breadth and depth, ensuring that all learners develop the technical and practical skills required in the occupational area. Learners are then given the opportunity to develop a range of transferable skills and attributes expected by employers. It is expected that learners will apply their learning to relevant employment and sector contexts during delivery, and that they will have opportunities to engage meaningfully with employers.

BTECs have always required 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 practical, work-related tasks that encourage the development of appropriate work-related behaviours (the affective domain) and transferable skills. Transferable skills are those such as communication, teamwork, planning and completing tasks to a high standard, all of which are valued in the workplace.

Our approach provides rigour and balance and promotes the ability to apply learning immediately in new contexts.

Some of the units in this 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 this qualification in, 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 skills and occupationally-based qualifications at this level.

External assessment

In this qualification, there is one external assessment, which assesses a unit that contributes 25% of the total qualification GLH. The external assessment for this qualification takes the form of an onscreen test that includes a variety of onscreen question types and allows learners to apply their knowledge to several work-related contexts. The external assessment is linked to *Unit 1: Marketing in Business*, as indicated in the qualification structure on the previous page.

This method has been used to externally assess the unit because it is best suited to draw out the evidence to exemplify the expectations of the unit and to provide sufficient evidence of achievement of the purpose of the unit.

The external assessment is taken under specified conditions, then marked by Pearson and a grade awarded. Learners must achieve the externally-assessed unit at Pass grade or above to achieve the qualification. Learners are permitted to resit the external assessment once during their programme by taking a new assessment.

For further information on external assessment see *Section 7 External assessment*.

Internal assessment

Units 2, 3 and 4 are assessed through internal assessment. Internal assessment allows learners to apply technical knowledge and demonstrate mastery of practical and technical skills through realistic tasks and activities. This style of assessment promotes deep learning through ensuring the connection between knowledge and practice.

Internal assessment is through assignments that are subject to external standards verification. We provide suggestions in each unit for setting assignments. This means that you can adapt materials to your local contexts and assess assignments that provide the valid and rigorous final assessment for each unit.

You will make grading decisions based on the requirements and supporting guidance given in the units. Learners must achieve all the internally-assessed units at Pass grade or above to achieve the qualification. For further information on internal assessment, including resubmissions, see *Section 6 Internal assessment*.

Synoptic internal assessment

There is one internally-assessed unit that provides the main synoptic assessment for this qualification. This synoptic assessment is designed to take place towards the end of the programme and draws on the learning throughout. The design of this assessment ensures that there is sufficient stretch and challenge, enabling the assessment of sector-related knowledge and technical and practical skills at the end of the learning period.

The synoptic assessment for this qualification is based on *Unit 4: Plan and Present a Marketing Campaign* and takes the form of a vocational activity in which learners have to carry out market research to plan, create and present a marketing campaign. In completing this synoptic activity, learners will have to consider and select content that will enable them to apply their knowledge and skills from across the other units in an integrated way to a realistic work situation.

In delivering the unit, you need to encourage learners to draw on their broader learning so that they are prepared for the assessment.

Language of assessment

Assessment of the internally- and externally-assessed units for this qualification will be available in English. All learner work must be in English. A learner taking the qualifications may be assessed in British Sign Language where it is permitted for the purpose of reasonable adjustment. For information on reasonable adjustments see *Section 8 Administrative arrangements*.

Grading of the qualification

Achievement in the qualification requires a demonstration of depth of study in each unit, assured acquisition of the practical skills required for employment in the specific sector and successful development of transferable skills.

Units are assessed using a grading scale of Distinction, Merit, Pass and Unclassified. All units in the qualification contribute proportionately to the overall qualification grade.

The qualification is graded using a scale of P to D. Please see *Section 10 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.

Employer involvement

Employer involvement in the delivery and/or assessment of technical qualifications provides a clear 'line of sight' to work, enriches learning, raises the credibility of the qualification in the eyes of employers, parents and learners, and furthers collaboration between the learning and skills sector and industry.

You need to ensure that all learners have the opportunity to undertake meaningful activity involving employers during their course.

Examples of 'meaningful activity' include:

- structured work experience or work placements that develop skills and knowledge relevant to the qualification/industry
- project(s), exercise(s) and/or assessments/examination(s) set with input from industry practitioner(s)
- units delivered or co-delivered by an industry practitioner(s); this could take the form of masterclasses or guest lectures
- industry practitioners operating as 'expert witnesses' who contribute to the assessment of a learner's work of practice, operating within a specified assessment framework; this may be a specific project(s), exercise(s) or all assessments for a qualification.

Meaningful employer involvement, as defined above, must be with employers from the marketing sector and should contribute significantly to at least one mandatory unit.

We have also provided suggestions in the units on how employers could become involved in the delivery and/or assessment of this qualification. The units are:

Unit 1: Marketing in Business

Unit 2: Research the Marketing of a Product or Service

Unit 3: Create Digital Marketing Communications

Unit 4: Plan and Present a Marketing Campaign.

These are suggestions only and there will be other possibilities at local level. Centres may choose to use other approaches but must ensure that they meet the requirement for meaningful employer involvement as defined above. Centres must have an employer involvement plan in place at the start of the programme. It must detail their approach to employer involvement and how it will add value to the delivery and assessment of the qualification.

Each centre's approach to employer involvement will be monitored in two ways. It will be monitored at centre level as part of the annual quality-management review process, and captured as part of the standards verification 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. It will also be monitored 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 that additional activities can be scheduled where necessary so that learners are not disadvantaged, see *Section 9 Quality assurance*.

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:

- internally-assessed units
- externally-assessed units.

This section explains how the units work. It is important that all tutors, assessors, internal verifiers and other staff responsible for the programme read and are familiar with the information given in this section.

Internally-assessed units

Section	Explanation
Unit number	The number is in a sequence for the qualification.
Unit title	This is the formal title of the unit and appears on certificates.
Level	All units are at Level 2 on the national framework.
Unit type	This says if the unit is mandatory or optional for the qualification. See <i>Section 2 Qualification structure</i> for details.
Assessment type	This says how the unit is assessed – i.e. whether it is external, internal or synoptic internal. See <i>Section 2 Qualification structure</i> for details.
GLH	Units have a GLH value of 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.
Unit in brief	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.
Unit introduction	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.
Learning aims	These help to define the scope, style and depth of learning of the unit. You can see where learners should be developing and demonstrating their skills or where they should be actively researching or reviewing.
Unit summary	This section helps tutors to see at a glance the main content areas against the learning aims and the structure of the assessment. The forms of evidence given are suitable to fulfil the requirements.
Content	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
Assessment criteria	Each learning aim has assessment criteria to explain the achievement required to obtain Pass, Merit and Distinction grades.
Essential information for assessment decisions	This information gives guidance for each learning aim or assignment of the expectations for Pass, Merit and Distinction standard. This section contains examples and essential clarification. It is important that this is used carefully alongside the assessment criteria.
Assessment activity	This section provides information, suggested scenarios and tasks for summative assessment activities.
Further information for tutors and assessors	This section gives you information to support the delivery and assessment of the unit.
Delivery guidance	This section offers suggestions of ways of delivering the unit. It offers ideas on practical activities in a sector context that can be used to help develop relevant skills and to encourage progress.
Essential resources	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 11 Resources and support</i> .
Links to other units	This section shows you the main relationships of units to other units. This can help you to structure your programme and make the best use of available materials and resources.
Employer involvement	This section gives you information on the units that can be used to involve learners with employers. This information will help you to identify the kind of involvement that is likely to be successful.

Externally-assessed units

Section	Explanation
Unit number	The number is in a sequence for the qualification.
Unit title	This is the formal title of the unit and appears on certificates.
Level	All units are at Level 2 on the national framework.
Unit type	This says if the unit is mandatory or optional for the qualification. See <i>Section 2 Qualification structure</i> for details.
Assessment type	This says how the unit is assessed – i.e. whether it is external, internal or synoptic internal. See <i>Section 2 Qualification structure</i> for details.
GLH	Units have a GLH value of 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.
Unit in brief	A brief formal statement on the content of the unit.
Unit introduction	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.
Summary of assessment	This sets out the type of external assessment used and the way in which it is used to assess achievement.
Assessment outcomes	These show the hierarchy of knowledge, understanding, skills and behaviours assessed. For tested units, they include information on how this hierarchy relates to command terms in sample assessment materials (SAMs).
Essential content	For externally-assessed units all the content is obligatory, the depth of content is indicated in the assessment outcomes and sample assessment materials (SAMs). The content will be sampled through the external assessment over time, using the variety of questions or tasks shown.
Grade descriptors	We use grade descriptors when making judgements on grade boundaries. You can use them to understand what we expect to see from learners at particular grades.
Key terms typically used in assessment	These definitions will help you to analyse requirements and to prepare learners for assessment.
Links to other units	This section shows the main relationships of units to other units. This section can help you to structure your programme and make the best use of available materials and resources.
Employer involvement	This section gives you information on the units that can be used to involve learners with employers. This information will help you to identify the kind of involvement that is likely to be successful.

Units

This section contains all the units developed for this qualification.

Unit 1: Marketing in Business	13
Unit 2: Research the Marketing of a Product or Service	25
Unit 3: Create Digital Marketing Communications	39
Unit 4: Plan and Present a Marketing Campaign	53

Unit 1: Marketing in Business

Level: **2**

Unit type: **Mandatory**

Assessment type: **External**

Guided learning hours: **60**

Unit in brief

Learners gain knowledge and understanding of marketing tools and techniques, and the importance of the use of digital and offline marketing activities to the success of a business.

Unit introduction

Marketing is used to identify customer demand for a product or service and to develop ways in which customers can purchase it to make the business profitable. This involves evaluating market research and the product, place, price, promotion, physical evidence, people and processes, also known as the 'seven Ps'.

In this introductory unit, you will gain an understanding of how marketing works to help make businesses successful through understanding the needs, wants and aspirations of their customers, and satisfying them by selling products or providing services they want.

This unit will give you the knowledge and understanding to progress to employment as a marketing and branding assistant, or marketing and communications assistant in marketing departments or marketing agencies.

Summary of assessment

This unit is assessed using an onscreen test, set and marked by Pearson. The test contains different types of question and is worth 60 marks. The test duration is 75 minutes. The assessment is available on demand. The first assessment is available in March 2019.

Sample assessment materials will be available to help centres prepare learners for assessment.

Assessment outcomes

AO1 Knowledge and recall of marketing principles, concepts, processes, key terms, data sources and definitions

Command words: classify, define, describe, give, identify, list, match, name, select, state

Marks: ranges from 1 to 2 marks

AO2 Apply knowledge and understanding of marketing principles, concepts, processes, key terms, data sources and definitions to real-life business scenarios in familiar and unfamiliar contexts

Command words: apply, explain, give, identify, list, name, state, select

Marks: ranges from 1 to 4 marks

AO3 Comparison (analysis) of marketing information and data, and the marketing mix, demonstrating the ability to interpret the potential impact and influence on marketing plans

Command words: analyse, assess, discuss, explain

Marks: ranges from 2 to 6 marks

AO4 Assess (evaluate) evidence to make informed judgements about how marketing should be planned, developed and adapted, considering changing circumstances

Command words: analyse, assess, compare, discuss, explain, evaluate

Marks: ranges from 2 to 6 marks

Essential content

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

A What is marketing?

A1 Marketing

Knowledge and understanding of the marketing and sales functions and their importance to a business.

- Marketing is identifying, anticipating and satisfying customer requirements profitably by:
 - identifying something that people or businesses want and are prepared to pay for, or a problem that they would like solved
 - developing a product or service to meet that need and promoting it
 - working out the details and making sure the business is charging the right price for the product or service.
- Sales teams sell products and services by: prospecting for new customers through cold calling, following up on leads, converting enquiries or leads into sales, presenting/demonstrating products to customers, developing and maintaining relationships with new and existing customers, implementing marketing initiatives.

A2 Marketing skills

Knowledge and understanding of the skills required in marketing and sales.

- Skills required for working in marketing and sales:
 - interpersonal communication both face to face and online: speaking with people/customers, and responding to queries, interviewing people/customers
 - written/digital communication: preparing written documents/digital media, putting together information packs
 - creativity and expression/digital creativity: setting up displays, demonstrating how to use a product and handing out leaflets, brochures, coupons and free samples
 - influencing and negotiating skills: talking about products and services, and their benefits, meeting or phoning people/customers to persuade them to buy products or services
 - computer skills: word-processing documents, processing orders and payments, using technology systems and software applications tools and techniques, producing digital marketing communications/media
 - organisation skills: time management, planning and prioritising.

B How the features of different businesses affect their marketing activities

B1 Ownership, purpose and scope of businesses

Knowledge and understanding of ownership, purpose and scope, and evaluation of their impact on the marketing activities of different businesses.

- Ownership:
 - private: sole trader, partnership, private limited company (Ltd), public limited company (plc), cooperative
 - public: government departments, local authorities, public corporations
 - not-for-profit: charitable trust, voluntary sector business, community interest companies (CICs).
- Purposes, supply of products or services, difference between for-profit and not-for-profit businesses.
- Scope of business activities: local, national and international.

UNIT 1: MARKETING IN BUSINESS

B2 Aims and objectives of businesses

Knowledge and understanding of business aims and objectives, and evaluation of the impact they may have on marketing decisions, and in setting realistic marketing objectives for success.

- Business aims: a statement of purpose, where the business wants to go in the future:
 - private: survival, break-even, making profits, growth, market share
 - public: social wellbeing, security, value for money
 - not-for-profit: to help vulnerable people/animals, to support communities both in this country and abroad.
- Business objectives: stated, measurable targets of how to achieve business aims.
- Mission statement: sets out the business vision and values that enable employees, managers, customers and suppliers to understand the basis for the actions of the business; allows a business to define and establish its brand.
- Marketing objectives: stated, measurable targets of what a business wants to achieve from its marketing, marketing objectives are shaped by business aims and objectives:
 - maintain/increase sales, market share, profitability
 - build/increase brand awareness and loyalty
 - develop/launch new products or services
 - target existing/new customers
 - enter new markets locally or internationally
 - enhance customer relationships
 - understand the wants, needs and aspirations of customers
 - gain an advantage over competitors.
- SMART (specific, measurable, achievable, realistic, time-constrained) objectives.
- Measures of success: how far a business meets its objectives.
- Methods of measuring success: sales volume/value, market share, profit, customer satisfaction/reputation/repeat business.

C How to create a marketing plan**C1 The marketing mix**

Knowledge and understanding of the elements of the marketing mix, and evaluation of the possible positive and negative impacts of these on a business as part of a marketing plan.

- The seven Ps: a set of actions, or tactics, that a business uses to promote its brand or product/service in the market:
 - product:
 - the features and appearance of goods and services and their packaging
 - the stages of the product life cycle: development, introduction, growth, maturity, decline
 - place: point where products are made available to the customer, how the product is distributed to the customer:
 - physical location (bricks)
 - online sales (clicks)
 - physical location and online sales (bricks and clicks)
 - price: price of products/services and the use of pricing strategies:
 - penetration: price is set artificially low to gain market share
 - skimming: setting a high price before competitors come into the market
 - competitor based: setting a price based on what the competition is charging
 - cost plus: adding direct costs and overhead costs to a mark-up percentage to price a product
 - premium: using a high price where there is a unique brand
 - value: providing value products and services to retain sales due to external factors of recession or increased competition

- promotion: how customers are informed about products:
 - promotional advertising
 - public relations (PR)
 - sponsorship
 - celebrity endorsement/celebrity marketing
 - use of social and other media
 - guerrilla marketing
 - personal selling
 - product placement
 - digital marketing
 - above- and below-the-line promotion
- physical evidence: the tangible cues that help customers to evaluate products/services before they purchase:
 - environment in which the product/service is being bought
 - uniform/dress code of staff
 - appearance and efficiency of website, social media and digital communications
 - packaging
- people: everyone who is involved directly or indirectly with the product/service:
 - managers and employees ensuring the branding and marketing is communicated appropriately
 - product/service knowledge
 - customer service – staff appearance, attitude, appropriate training
- processes: the methods used to deliver the product/service:
 - handling sales
 - processing orders
 - distribution and delivery of products/services
 - after-sales service.
- Unique selling point (USP).
- Marketing plan: tailoring messages and having the right mix of marketing elements to bring marketing activities together effectively and in line with a budget.

C2 Marketing communications

Knowledge and understanding of using different types of marketing communications, and evaluation of the impact of these on a business.

- Marketing communications (MarCom): all the messages and media deployed to communicate with the market, to include: advertising, branding, direct marketing, online presence, packaging, printed materials, public relations (PR) activities, sales presentations, sponsorships, trade show appearances, word of mouth.

C3 Brands and branding

- Knowledge and understanding of brands and branding, and how they impact positively and negatively on the business.
- Brand: a well-recognised product or service with unique character, design or image.
- Brand identity: how a business wants to be seen by customers.
- Brand image: how customers see the brand.
- Branding: the use of a name, logos, trademarks, colours, symbols, images, design and celebrity endorsements to identify a product/service and differentiate it from its competition, in order to attract and retain customers.
- Brand personality: a set of human characteristics that are attributed to a brand name.
- Advantages of branding: creates awareness, inspires customer loyalty leading to repeat sales and word-of-mouth recommendation, enables a business to charge higher prices.
- Disadvantages of branding: high investment required, if a brand fails it may create a negative image of the business, customers may not be willing to pay extra for branded goods.

C4 Regulating marketing and advertising to customers

Knowledge and understanding of the relevant regulations (as current at time of delivery) that apply to marketing and advertising, their importance and how these are applied by marketers.

- Marketing and advertising must be legal, decent, honest, truthful, and socially responsible.
- Advertising codes: the UK's independent advertising regulator the Advertising Standards Authority (ASA) sets codes to make sure adverts across UK media stick to the advertising rules.
- The Consumer Protection from Unfair Trading Regulations 2008 (CPRs): legislation to prevent businesses from misleading or harassing customers when advertising by:
 - including false or deceptive messages
 - leaving out important information
 - using aggressive sales techniques.

D How marketing information is used to identify the needs, wants and aspirations of customers

D1 Targeting and segmenting the market

Knowledge and understanding of targeting the market, its importance, and the impact this has on a marketing plan.

- Researching the market to identify:
 - market segmentation by identifying key differentiators that divide customers into groups that can be targeted:
 - demographics: age, race, religion, gender, family size, ethnicity, income, education level, socio-economic group
 - geographic: location
 - psychographic: social class, attitudes, lifestyle and personality characteristics
 - behavioural: spending, consumption, usage, loyalty status and desired benefits
 - classifying the population by social grade based on occupation, enables a household and all its members to be classified according to the occupation of the Chief Income Earner (CIE):
 - A: upper middle class – higher managerial, administrative and professional
 - B: middle class – intermediate managerial, administrative and professional
 - C1: lower middle class – supervisory, clerical and junior managerial, administrative and professional
 - C2: skilled working class – skilled manual workers
 - D: working class – semi-skilled and unskilled manual workers
 - E: those at lowest level of subsistence – state pensioners, casual and lowest-grade workers, unemployed with state benefits only
 - target markets
 - size, structure and trends in the market
 - competitors and their activities
 - customer wants, needs, expectations and aspirations.

D2 Market research methods

Knowledge and understanding of appropriate types of market research to support marketing activities, and its impact on marketing.

- Qualitative research – data based on individual customer responses, using open-ended questions to find out how they feel, what they think, and why they make certain choices.
- Quantitative research – gathering data in a numerical form that can be put into categories, or in rank order, or measured in units of measurement through audits, surveys, polls and clickstreams.
- Primary research: new research carried out directly with potential customers.

- Sources of primary research: questionnaire/survey/interview (online, phone, paper), focus groups, observation/visit, trials, mystery shopping.
- Secondary (desk) research: using existing research from third parties.
- Sources of secondary research: online research, business materials, directories, market reports, sector reports, commercial research, government reports.
- Sampling: getting opinions from several people from a specific group to find out about the whole group.
- Appropriateness of research: validity, reliability, currency, cost.

D3 Use and storage of customer information

Knowledge, understanding and application of the relevant legislation (as current at time of delivery) and its impact on the use and storage of customer information.

- General Data Protection Regulation (GDPR) which will come into force on 25 May 2018: protects and empowers all EU citizens' data privacy and reshapes the way organisations approach data privacy, regardless of whether they have a physical presence in the EU. They must make sure the information is:
 - used fairly and lawfully
 - used for limited, specifically stated purposes
 - used in a way that is adequate, relevant and not excessive
 - accurate
 - kept for no longer than is absolutely necessary
 - handled according to people's data protection rights
 - kept safe and secure
 - not transferred outside the European Economic Area without adequate protection.

E How different types of marketing are used by businesses

E1 Types of marketing

Knowledge and understanding of the types of marketing, and an evaluation of its importance in achieving business objectives.

- Customer: a person who buys goods or services.
- Consumer: a person who uses the products or services they have bought or were bought for them.
- Business to consumer (B2C) marketing: attempting to reach a category of people that will be likely to purchase/use the product or service.
- Mass marketing: advertising or promoting to a wide variety of audiences, attempting to appeal to all types of customer.
- Niche marketing: aiming a product at a specific type of customer, usually a smaller segment of a larger market.

E2 Digital marketing

Knowledge and understanding of types of digital marketing, and an evaluation of the benefits and risks of each.

- Digital marketing: marketing products or services using electronic devices; online, mobile and onscreen. Digital marketing can be both online and offline.
- Types of digital marketing:
 - online/website advertising: advertising/buying banner space on a third-party website, pop-ups
 - search engine marketing (SEM)/pay-per-click (PPC) advertising: placing adverts to the right or above the search results, advertisers pay a fee each time one of their ads is clicked

UNIT 1: MARKETING IN BUSINESS

- search engine optimisation (SEO):
 - ensuring that a site is accessible to a search engine and improving the chances that the site will be found by the search engine; increasing a website's visibility across search engines
 - organic SEO: obtaining a natural placement on organic search engine results pages (SERPs)
- social media marketing (SMM): marketing a product or service on the internet through different social networks; viral marketing
- email marketing/e-blast: delivering personalised/targeted messages at the correct time
- content marketing: blogs/vlogs, podcasts, webinars, videos, infographics.

E3 Offline marketing

Knowledge and understanding of types of offline marketing, and an evaluation of the benefits and risks of each.

- Offline marketing: any promotion or advertisement that is published and released outside the internet:
 - print: local and national newspapers and freesheets, print billboards, posters, banners, press releases, business cards
 - enhanced offline marketing: electronic billboards, samples of an electronic device at a store
 - text-message marketing: sending quick and timely information to smartphones
 - broadcast: TV/radio adverts
 - direct mail: postcards, brochures, letters, catalogues, flyers
 - telephone marketing/telemarketing: delivering sales messages over the phone
 - trade shows, exhibitions, events
 - public relations (PR)
 - sponsorship
 - special deals, coupons and discounts
 - guerilla marketing, flash mobs
 - loyalty programmes.

E4 Factors affecting marketing

Knowledge, understanding and evaluation of the types of internal and external factors affecting marketing, and the benefits of carrying out situational analysis.

- Internal factors affecting marketing: business objectives, business culture, operational issues, finance (costs, budgetary constraints), timescales.
- External factors affecting marketing: economic environment, competitor actions, ethical considerations, social and political issues, cultural issues, technology and technological change, market dynamics.
- Situational analysis for making marketing decisions:
 - Political, Economic, Social, Technological, Legal, Ethical (PESTLE); used by marketers to analyse and monitor the external marketing environment factors that have an impact on a business
 - Strengths, Weaknesses, Opportunities, Threats (SWOT): used to analyse the internal and external factors, usually the first stage of planning, helps marketers to focus on key issues.

Grade descriptors

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

Level 2 Pass

Learners will demonstrate knowledge and understanding of the factors that affect marketing, and apply them in context. They can interpret given information to explain factors that could potentially affect the success of a marketing strategy for a business, including the impact of specific factors such as budgetary constraints. Learners can explain how different marketing activities can have positive or negative impacts on the success of a business. They will apply knowledge and understanding of marketing research and can make some realistic recommendations for successful marketing plans.

Level 2 Distinction

Learners will demonstrate a high level of knowledge and understanding of the factors that affect marketing, and apply them in context. They will demonstrate a high level of ability to interpret given information and can explain, in detail, the factors that could potentially affect the success of a marketing plan for a business, including weighing up specific factors such as budgetary constraints. Learners can interpret and apply marketing research information, and make clear recommendations for successful marketing plans with convincing justifications.

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
Analyse	Learners present the outcome of methodical and detailed examination by: <ul style="list-style-type: none"> • breaking down a theme, topic or situation in order to interpret and study the interrelationships between the parts • using information or data to interpret and study key trends and interrelationships. For example, 'Analyse the...'.
Apply	Learners put knowledge, understanding or skills into action in a particular context. For example, 'Apply the...'.
Classify	Learners arrange a group of items in classes or categories according to shared qualities or characteristics. For example, 'Classify skills...'.
Compare	Learners identify the main factors relating to two or more items/situations or aspects of a subject that is extended to explain the similarities, differences, advantages and disadvantages. For example, 'Compare the...'.
Define	Learners' work, performance or practice states or describes the nature, scope or meaning of a subject as objective facts. For example, 'Define the...'.
Describe	Learners give a clear, objective account in their own words, showing recall and, in some cases, application of the relevant features and information about a subject. For example, 'Describe one...'.
Discuss	Learners consider different aspects of a topic, how they interrelate and the extent to which they are important. For example, 'Discuss the...'.
Evaluate	Learners draw on varied information, themes or concepts to consider aspects such as: strengths or weaknesses, advantages or disadvantages, alternative actions, relevance or significance. Learners' enquiries should lead to a supported judgement, showing relationship to its context. This will often be in a conclusion. For example, 'Evaluate whether...'.

Command or term	Definition
Explain	Learners show clear details and give reasons and/or evidence to support an opinion, view or argument. They could show how conclusions are drawn (arrived at). Learners show that they comprehend the origins, functions and objectives of a subject, and its suitability for purpose. For example, 'Explain one reason...'
Give	Learners state or put forward information or an argument. For example, 'Give one...'
Identify	Learners indicate the main features or purpose of something, and/or are able to discern and understand facts or qualities. For example, 'Identify one...'
List	Learners give a number of connected items or names consecutively. For example, 'List two...'
Match	Learners select an item from one column and match it to an item in the other column. For example, 'Match the...'
Name	Learners identify a class or category of things, either uniquely or in a given context. For example, 'Name one...'
Outline	Learners summarise or indicate the principal features of something, or give a brief description or explanation with main points. For example, 'Outline two...'
Select	Learners pick one or more items from a definite set. For example, 'Select one...'
State	Learners express something definitely or clearly. For example, 'State two...'
What	Learners choose one item from a definite set. For example, 'What type...?'
Which	Learners specify one or more items from a definite set. For example, 'Which of these...?'

UNIT 1: MARKETING IN BUSINESS

Links to other units

This unit assesses the underpinning knowledge in:

- Unit 2: Research the Marketing of a Product or Service
- Unit 3: Create Digital Marketing Communications
- Unit 4: Plan and Present a Marketing Campaign.

Employer involvement

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

- guest speakers from relevant marketing departments
- work experience in relevant marketing roles
- support from local marketing staff as mentors
- marketing staff to run workshops on the use of marketing in business.

Unit 2: Research the Marketing of a Product or Service

Level: **2**

Unit type: **Mandatory**

Assessment type: **Internal**

Guided learning hours: **60**

Unit in brief

Learners develop their understanding of how marketing tools and techniques are used, the skills needed to research the marketing of a product or service and analyse and present marketing data.

In order to develop the understanding and skills for this unit, and to facilitate assessment, it is strongly recommended that learners take part in work experience in a marketing environment.

Unit introduction

Marketing products and services are some of the most important skills required by staff in businesses. Interacting with customers face to face, over the telephone or through digital media channels is a marketing opportunity to identify customers' likely wants and needs for products and services, and to motivate them to buy.

In this unit, you will be exploring the tools, techniques and marketing mix used for the successful marketing of products and services. You will plan and carry out research, and analyse and present research data on the marketing of products and services.

This unit will give you the knowledge, personal and vocational skills, and behaviours to progress towards roles such as marketing and branding assistant, and marketing and communications assistant in marketing departments and marketing agencies.

Learning aims

In this unit you will:

- A** Understand the tools and techniques used for marketing products and services
- B** Plan and implement research of the marketing for a selected product or service to meet a specific objective
- C** Analyse and present research data on the marketing of products or services.

Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
A Understand the tools and techniques used for marketing products and services	A1 The marketing of a range of different types of products and services A2 Tools used for the marketing of products and services A3 Techniques used for the marketing of products and services A4 Extended marketing mix A5 Features of successful marketing of products and services	Photographic/video evidence of the marketing of three different products and services, focusing on the tools, techniques and marketing mix. This needs to be followed by an explanation of how specific tools, techniques and marketing mix contribute to the successful marketing of three different products and services and support the achievement of the marketing objectives.
B Plan and implement research of the marketing for a selected product or service to meet a specific objective	B1 Planning process for researching the marketing of products or services B2 Products and services B3 Researching and collecting research data about the marketing of new or existing products or services	Research plan and research findings of the marketing for a selected product or service. This needs to be followed by an analysis of the research data, and recommendations for improvements of the marketing of a selected product or service, or another less successful product or service where appropriate.
C Analyse and present research data on the marketing of products or services	C1 Analysing and presenting research data	
Key teaching areas in this unit include:		
Sector skills	Knowledge	Transferable skills/behaviours
<ul style="list-style-type: none"> Marketing techniques 	<ul style="list-style-type: none"> The marketing function Marketing techniques 	<ul style="list-style-type: none"> Communication Preparing for work Demonstrate thinking skills and show adaptability Developing practical and technical skills Problem solving Self-management and development

Unit content

Knowledge and sector skills

Learning aim A: Understand the tools and techniques used for marketing products and services

A1 The marketing of a range of different types of products and services

- Different types of products, including:
 - a business to business (B2B) product, e.g. components for cars
 - a business to consumer (B2C) product, e.g. soft drinks
 - niche products, e.g. sports television channels
 - not-for-profit products, e.g. greetings cards for fundraising.
- Different types of services, including:
 - a business to business (B2B) service, e.g. setting up a company IT network
 - a business to consumer (B2C) service, e.g. online delivery
 - niche services, e.g. personal shopping
 - not-for-profit services, e.g. NHS promotion campaigns.

A2 Tools used for the marketing of products and services

- Offline tools, including:
 - printed direct mail materials, e.g. flyers, newsletters, mailshots
 - point-of-sale tools, e.g. posters, in-store display materials
 - samples/free trials, e.g. free perfume sachets, free spa service vouchers
 - events, e.g. opening events for new dentist practices, launch events for new products.
- Digital tools, including:
 - social media, e.g. videos of products working, social media groups for service/product/charity
 - direct email marketing, e.g. launch of new websites, requests for marketing research information
 - websites, e.g. landing pages for marketing campaigns with products/services information and business contact information.

A3 Techniques used for the marketing of products and services

- Transactional marketing, e.g. bulk sale of plastic cups.
- Relationship marketing, e.g. personal selling from a car dealership.
- Viral marketing, e.g. social media posts.
- Undifferentiated marketing, e.g. branded soft drinks.
- Differentiated and concentrated marketing, e.g. high-end branded watches.
- Ambush marketing, e.g. marketing around world sporting events.

A4 Extended marketing mix

- Product.
- Place.
- Price.
- Promotion.
- Physical evidence.
- People.
- Processes.

UNIT 2: RESEARCH THE MARKETING OF A PRODUCT OR SERVICE

A5 Features of successful marketing of products and services

- Products or services that deliver benefits to customers – quality, differentiation and unique selling point (USP).
- Planning products or services before developing – definition of the market and product.
- Technological interaction and quality – technology the business needs to build the product.
- Marketing interaction and quality – marketing tools and techniques the business needs to match the product.
- Market appeal – size of the market, importance of the product to the market.
- Contribution of successful marketing to meeting marketing objectives:
 - changing perceptions of the brand, product or service
 - increased repeat business
 - increased sales
 - increased digital traffic to website/social media or footfall in retail areas
 - increased donations/beneficiaries for not-for-profit organisations
 - increased understanding of business contribution to corporate social responsibility.

Learning aim B: Plan and implement research of the marketing for a selected product or service to meet a specific objective

B1 Planning process for researching the marketing of products or services

- Types of research, including primary, secondary.
- Purpose of research, e.g. collecting customers' views and opinions, collecting data on trends in the marketing of new or existing products or services.
- Scale of the breadth and depth wanted regarding the information needed.
- Planning process, including:
 - timescale to carry out the research
 - research skills used for primary research, e.g. selecting participants; choosing research methods, including interviewing, audio recording, making videos/taking photographs, designing surveys/questionnaires, observing people and recording observations, using open and closed questions, deciding when and where to collect feedback and responses, ensuring validity and non-bias
 - research skills used for secondary research, e.g. checking reliability of sources, selecting appropriate data from different sources, checking for bias, currency and accuracy, collating data.

B2 Products and services

- New products or services that have been recently launched in the market.
- Existing products and services, flagging products/services, product/service extensions.

B3 Researching and collecting research data about the marketing of new or existing products or services

- Research into new or existing product or service ideas, including:
 - primary research regarding products or services:
 - selecting the sample
 - gathering research data on the marketing of new or existing products or services
 - selecting the correct types of questions
 - collecting customers' views and opinions, e.g. the types of products they buy, opinions on the product or service, how much they are willing to pay
 - secondary research into products or services in identified markets, e.g. collecting data on trends in the marketing of new or existing products or services, e.g. customer data, published reports, government statistics, media reports, online research, websites, company materials
 - primary and secondary research considerations:
 - selecting unbiased sources
 - using qualitative research – feeling and thoughts leading to making certain choices
 - using quantitative research – statistical and numerical data
 - using demographic market research reports to help in characterising a specific demographic profile, e.g. age, gender, religion, spending power
 - investment/costs
 - checking validity of information gathered.

Learning aim C: Analyse and present research data on the marketing of products or services**C1 Analysing and presenting research data**

- Analysing and presenting research data on the marketing, e.g.:
 - creating graphs, tables and charts to present data
 - making calculations such as percentages to collate data
 - making justified decisions regarding the marketing campaign based on the data
 - considering the validity and reliability of the data
 - limitations of the research, including accuracy, bias, subjectivity, reliability.
- Recommending improvements.

Transferable skills

Communication

- Writing, speaking and listening to others when implementing research and presenting marketing research data.
- Using body language to help communication when implementing research and presenting marketing research data.
- Communicating the marketing of products or services in a variety of ways, including electronic and social media.

Preparing for work

- Planning and carrying out research for the marketing of products or services.

Demonstrate thinking skills and show adaptability

- Showing ability to think independently about issues/problems in marketing environments.
- Being prepared to use own initiative appropriately in marketing environments.
- Demonstrating a positive attitude in marketing environments.
- Showing adaptability when circumstances demand in marketing environments.

Developing practical and technical skills

- Demonstrating skills in researching the marketing for products and services.

Problem solving

- Asking questions to clarify information given by customers on products or services.

Self-management and development

- Being proactive, flexible, resilient and able to work under pressure in marketing environments.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Understand the tools and techniques used for marketing products and services		
A.P1 Identify the tools, techniques and marketing mix used for marketing three different products and services.	A.M1 Describe how specific tools, techniques and marketing mix contribute to the successful marketing of three different products and services and marketing objectives.	A.D1 Explain how specific tools, techniques and marketing mix contribute to the successful marketing of three different products and services and support the achievement of the marketing objectives.
A.P2 Describe the features of successful marketing of three different products and services.		
Learning aim B: Plan and implement research of the marketing for a selected product or service to meet a specific objective		
B.P3 Produce a brief plan for the research of the marketing for a selected product or service to support and meet basic requirements.	B.M2 Produce a detailed plan and conduct primary and secondary research using different sources effectively to support the marketing for a selected product or service, and meet many of the requirements to be achieved.	B.D2 Produce a comprehensive plan and conduct primary and secondary research using different sources effectively to support the marketing for a selected product or service, and fully meet the requirements to be achieved.
B.P4 Carry out basic research using different sources to support the marketing of a selected product or service.		
Learning aim C: Analyse and present research data on the marketing of products or services		
C.P5 Conduct basic research data analysis on the marketing of a selected product or service.	C.M3 Conduct appropriate research data analysis on the marketing of a selected product or service, and present the data selecting appropriate formats.	C.D3 Conduct detailed research data analysis and process useful information on the marketing of a selected product or service, presenting the data and selecting appropriate formats, to support justification of decisions made and recommended improvements.
C.P6 Present research data on the marketing of a selected product or service.		

Essential information for assessment decisions

In order to develop the understanding and skills for this unit, and to facilitate assessment, it is strongly recommended that learners take part in work experience in a marketing environment.

To achieve Learning aim A criteria, learners might select one product and two services or two products and one service or use those given to them by tutors – but this must be agreed by tutors.

Learning aim A

For distinction standard, learners will:

- explain, giving clear details and reasons and/or evidence to support an argument on how offline and digital tools, techniques and the seven Ps in the extended marketing mix contribute to the successful marketing of three different products and services and support the achievement of marketing objectives. They will specify all the features of successful marketing for selected products and services, for example how the quality and differentiation of a selected product was promoted in terms of its benefits to the customer.

For merit standard, learners will:

- describe, giving a clear and objective account in their own words that shows recall and in some cases application, the relevant features and information on how offline and digital tools, techniques and the seven Ps in the extended marketing mix contribute to the successful marketing of three different products and services and marketing objectives. They will specify many of the features of successful marketing for selected products and services, for example the technology used by a business to market a selected product.

For pass standard, learners will:

- indicate the main features of the tools and techniques used for marketing three different products and services by recognising them and being able to discern facts or qualities, but they might only take into account the four Ps in the marketing mix. Learners will describe, giving a clear and objective account in their own words that shows recall and in some cases application, some of the relevant features and information of successful marketing of three different products and services.

Learning aims B and C

For distinction standard, learners will:

- produce a comprehensive research plan that is well developed and includes full coverage of factors and information to support and fully meet the requirements to be achieved. Learners will exhibit a range of appropriate skills for planning and implementing research. They will conduct primary and secondary research from different sources effectively, showing control over techniques and processes to efficiently meet the details and broad aims of the research, on the marketing for a selected product or service
- conduct detailed research data analysis, selecting and using relevant information from additional sources, investigating the effects of more than one variable, for example studying customers' views and opinions, and trends in the marketing of a selected product or service. Learners will collect and manipulate quantitative and qualitative data to produce meaningful and useful information on the marketing of a selected product or service, presenting the data selecting appropriate written or verbal formats, to support reasons to prove the decisions made are right or reasonable, and noting what could be improved.

For merit standard, learners will:

- produce a detailed research plan that includes many factors and information to support and meet the requirements to be achieved, but is missing some elements. Learners will exhibit appropriate skills in planning and implementing research. They will conduct primary and secondary research from different sources effectively, showing control over techniques and processes to efficiently meet the details and broad aims of the research, on the marketing for a selected product or service
- conduct research data analysis on the marketing of a selected product or service using quantitative and qualitative data. Learners will present the data selecting appropriate written or verbal formats.

For pass standard, learners will:

- produce a research plan that includes some factors and information to support and meet basic but adequate requirements for the research. Learners will exhibit a basic range of skills in planning and implementing research. They will carry out basic research from different sources about the marketing of a selected product or service
- conduct research data analysis on the marketing of a selected product or service, focusing on a question about one variable – quality or quantity – or about a statistical relationship between two variables – product/service quality and customer satisfaction. Learners will present research data in writing or verbally on the marketing of a selected product or service, but it might not be in the appropriate format.

Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

The following scenario could be used to produce the required evidence for this unit. Centres are free to use comparable scenarios or other forms of evidence provided that they meet the assessment requirements of the unit.

Suggested scenario

Your tutor will give you the opportunity to undertake a work placement or a work related project to allow you to research the marketing of a product or service. You will identify the tools, techniques and marketing mix used for marketing different products and services, and describe the features of successful marketing of different products and services. You will plan and implement research of the marketing for a selected product or service that allows you to meet a specified objective. You will then analyse and present research data on the marketing of a selected product or service.

If a retake is necessary, an alternative example must be used. The following is an example of a retake assessment activity.

A different product or service will be used to allow you to identify different tools, techniques and marketing mix used when planning and carrying out research, and analysing and presenting data on the marketing of selected products or services.

Further information for tutors and assessors

Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

Introduction to unit

An introduction to the marketing of a range of different types of products and services. Examples of different tools and techniques used for the marketing of products and services could be used, and their relative advantages and disadvantages considered.

Suggested time: about 3 hours.

Activity: The extended marketing mix

Tutor-led discussion on selected seven Ps of the extended marketing mix used for products and services.

Learners research the product, place, price, promotion, physical evidence, people and processes used for the marketing of a selected product or service. This research could then be presented to other learners, with feedback on the presentation helping to improve the information given.

Learners to prepare recommendations for improvements to different selected products and services' marketing mix.

Suggested time: about 4 hours.

Activity: The features of successful marketing of products and services

Learner research into different features of successful marketing of products and services.

Tutor-led discussion on the contribution of successful marketing to marketing objectives.

Learners to select a business and relate the contribution of successful marketing of products and services to marketing objectives, presenting their ideas to another learner.

Suggested time: about 4 hours.

Activity: How to plan research of the marketing for a selected product or service

Group discussion on the types of research used to, for example collect data on trends in the marketing of new or existing products or services.

This could then be used by learners to plan the research of the marketing of a selected product or service using appropriate samples.

Suggested time: about 3 hours.

Activity: How to implement research of the marketing for a selected product or service

Tutor-led discussion on primary and secondary research.

This can then be followed by learner research on using qualitative and quantitative research.

This could be extended to allow learners to create their own research into new or existing products or services.

Suggested time: about 6 hours.

UNIT 2: RESEARCH THE MARKETING OF A PRODUCT OR SERVICE

Activity: How to analyse research data on the marketing of products and services

Tutor-led discussion on the limitations of research, including accuracy, bias, subjectivity and reliability.

Group discussion on making justified decisions regarding the marketing campaign, based on the data.

Learners could also watch video clips to consider the validity and reliability of data.

Suggested time: about 8 hours.

Activity: How to present research data on the marketing of products and services

Tutor-led discussion on making calculations such as percentages to collate data.

Learners could participate in activities to develop skills in creating graphs, tables and charts to present data.

Suggested time: about 6 hours.

Essential resources

To develop the skills needed for this unit, learners will need to take part in work experience in a marketing environment.

Links to other units

This unit has strong links to:

- Unit 1: Marketing in Business
- Unit 3: Create Digital Marketing Communications
- Unit 4: Plan and Present a Marketing Campaign.

Employer involvement

In order to develop the skills for this unit, it is strongly recommended that learners take part in work experience in a marketing environment. Where this is not feasible or if it is insufficient for all assessment, then simulations may be used. Employers must be involved in simulations, for example through involvement in assessment or by providing assessment materials such as marketing information.

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

- how to plan and implement research on the marketing for products and services
- analysing and presenting research data on the marketing for products and services.

Unit 3: Create Digital Marketing Communications

Level: **2**

Unit type: **Mandatory**

Assessment type: **Internal**

Guided learning hours: **60**

Unit in brief

Learners develop the skills needed to develop and create digital marketing communications for a selected product or service.

Unit introduction

Digital marketing is one of the fastest-evolving industries and is indispensable to marketers. Today's customers interact with brands using multiple channels and devices, so the possibility of engaging with them by using a variety of different media is exciting.

In this unit, you will explore data on different types and uses of digital marketing communications and channels, and discover how to select suitable communications and channels to market products and services to target audiences. You will gain practical skills in creating digital marketing personas and designing and creating digital marketing communications for a selected product or service. You will optimise digital marketing communications and review their effectiveness in meeting specified objectives.

This unit will give you the knowledge, personal and vocational skills and behaviours to progress towards roles such as marketing and branding assistant, and marketing and communications assistant in marketing departments or marketing agencies.

Learning aims

In this unit you will:

- A** Explore how digital marketing communications contribute to business success
- B** Develop ideas for digital marketing communications for a selected product or service
- C** Create digital marketing communications for a selected product or service.

UNIT 3: CREATE DIGITAL MARKETING COMMUNICATIONS

Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
A Explore how digital marketing communications contribute to business success	A1 Applying digital marketing objectives to products and services A2 Digital marketing communications and channels used to meet digital marketing objectives	Photographic/screenshot evidence of two digital communications for a selected product or service, to include an evaluation of features that make digital marketing communications successful for a selected product or service and a review of the effectiveness of both of the digital marketing communications in meeting specified objectives.
B Develop ideas for digital marketing communications for a selected product or service	B1 Using design tools and techniques to develop digital marketing communications ideas B2 Setting costs for digital marketing communications	
C Create digital marketing communications for a selected product or service	C1 Developing digital marketing personas to use in the process of creating digital marketing communications C2 Ethical and legal considerations of creating digital marketing communications C3 Optimising digital marketing communications for products and services C4 Using digital marketing analytics tools C5 Reviewing effectiveness of digital marketing communications against set objectives	
Key teaching areas in this unit include:		
Sector skills	Knowledge	Transferable skills/behaviours
<ul style="list-style-type: none"> • Creating digital marketing communications • Using digital marketing channels • Using digital marketing analytics 	<ul style="list-style-type: none"> • Marketing objectives of a product or service • Marketing personas • Digital communications and channels • Content and digital marketing • Data and analytics 	<ul style="list-style-type: none"> • Communication • Developing practical and technical skills • Managing information • Problem solving

Unit content

Knowledge and sector skills

Learning aim A: Explore how digital marketing communications contribute to business success

A1 Applying digital marketing objectives to products and services

- Digital marketing objectives – set by a business to promote products or services to target audiences that should be achieved within a given timeframe, e.g. to:
 - generate brand awareness
 - generate sales
 - increase leads
 - attract and inform target audiences
 - generate traffic.
- Setting SMART (specific, measurable, achievable, realistic, time-bound) digital marketing objectives.
- Products, e.g. automotive, clothing, electrical appliances, food and grocery, footwear, electrical goods, homeware, music and video, personal care.
- Services, e.g. car repairs, tailoring, medical check-ups, mail delivery, banking, education.

A2 Digital marketing communications and channels used to meet digital marketing objectives

- Exploring digital marketing communications and digital marketing channels, e.g. other similar businesses, competitors, success of previous digital marketing campaigns, existing customer feedback, collecting potential customers' opinions.
- Digital marketing – using digital technologies and communication tools to market products or services to reach target audiences.
- Digital marketing communications – using digital methods, techniques and tools to pass messages through digital marketing channels to target audiences about products or services, e.g. email marketing, social media marketing, content marketing, online public relations, affiliate marketing, organic, referral, pay per click (PPC), display ads on websites.
- Digital marketing channels – using digital platforms to support the distribution of digital marketing communications to reach target audiences, e.g. websites, social media, smartphone/mobile apps, blogs/vlogs, podcasts, email, electronic billboards, online polls.

Learning aim B: Develop ideas for digital marketing communications for a selected product or service

B1 Using design tools and techniques to develop digital marketing communication ideas

- Using design tools, e.g. colour, font and icons, image creation, sourcing and editing.
- Using design techniques, e.g. timelines, storyboards, generating lists of assets.
- Meeting campaign objectives.
- Assessing appropriateness of design for selected products and services to target specific audiences.
- Selecting digital marketing personas.
- Keeping to budget, costs and resources.
- Following business branding, e.g. consistent use of logo, colour, font, design features.

UNIT 3: CREATE DIGITAL MARKETING COMMUNICATIONS

B2 Setting costs for digital marketing communications

- Digital marketing costs, e.g.:
 - cost per click (CPC)/pay per click (PPC) – digital marketing model used to direct traffic to websites, in which an advertiser pays a publisher, e.g. a website owner, when an ad is clicked
 - cost per lead (CPL) – digital marketing model where the advertiser pays for an explicit sign-up from a customer interested in the advertiser's offer
 - cost per view (CPV) – digital marketing model where the advertiser pays to have video adverts watched
 - cost per acquisition or action (CPA) – digital marketing model where the advertiser pays for a specified action, e.g. a sale, click, form submit.
- Length of campaign and time of year for specified digital marketing communications, e.g. duration, timing (time of day/week), seasonal.

Learning aim C: Create digital marketing communications for a selected product or service**C1 Developing digital marketing personas to use in the process of creating digital marketing communications**

- Digital marketing personas – fictional characters developed to characterise the key traits and profiles of particular target audiences, and how they might interact with digital marketing.
- Geographic profile – classification of potential customers based on their location, e.g. country, country region, city, urbanicity, climate.
- Demographic profile – classification of potential customers according to statistical data relating to the population and particular groups within it, e.g. age, gender, family size, income, housing, jobs.
- Psychographics profile – classification of potential customers according to their attitudes, aspirations and other psychological criteria, e.g. social class, social group status, social network role, beliefs, personality and self-image, attitudes, interests, hobbies, lifestyle.
- Webographics profile – classification of website users based on their surfing and online shopping habits and other related information, e.g. tenure and amount of online usage, types of usage, connection speed, internet device, specific online behaviour.
- Product or service relationship to persona, e.g. user status, usage rate, loyalty status, buying readiness, brand relationship (current and desired), quality characteristics.

C2 Ethical and legal considerations of creating digital marketing communications

- Ethical and legal guidelines (as current at time of delivery), to include relevant sections of:
 - Cookie Law 2015 – piece of privacy legislation that requires websites to get consent from visitors to store or retrieve any information on a computer, smartphone or tablet
 - General Data Protection Regulation (GDPR) 2018 which will come into force on 25 May 2018 – regulates the 'processing', which includes the collection, storage, transfer or use of personal data about EU individuals
 - Privacy and Electronic Communications Regulations 2003 – gives people specific privacy rights in relation to electronic communications.

C3 Optimising digital marketing communications for products and services

- Digital marketing communications optimisation – digital marketing tools and expertise, applied to a digital presence to generate more leads, increase customer conversions and grow a product/service.
- Optimising social media, e.g.:
 - internet service allowing users to share videos and music by engaging thumbnails, asking for engagement, optimising content for keywords, audience retention
 - online community allowing users to pin and share photos of items found on the internet by enhancing images, optimising board covers, targeting keywords
 - internet service allowing users to post message or images for their followers to see by updating header photo, completing profile and bio, using #hashtags and @mention, using images and videos, linking to website and special landing page, choosing careful and creative words
 - online social networking site allowing users to create personal profiles, share photos and videos, and communicate with other users by completing company info, adding cover and profile photo, using Call-to-Action button, pin to top, adding milestones, organising page tabs, personalising vanity URL, saving replies.
- Review sites optimisation, e.g. by gaining legitimate reviews, claiming own profile.
- Web page optimisation, e.g. by adding page description, keywords, tags, metadata.
- Carrying out split test to optimise a digital communication – way of comparing multiple versions of a web page to find out which one converts visitors best.

C4 Using digital marketing analytics tools

- Digital marketing analytics – measuring qualitative and quantitative digital communication data to gain customer insights.
- Measuring web analytic data using web analytic tools – page views, visits, bounce rate, session duration, demographics, device type tracking, traffic source, browser and operating system, language and location, keyword analysis, goal conversion.
- Measuring social media analytics Key Performance Indicators (KPIs), e.g.:
 - internet service allowing users to share videos and music, e.g. views, subscribers, likes/dislikes, comments, favourites, sharing
 - online community allowing users to pin and share photos of items found on the internet, e.g. followers, number of boards, number of pins, likes, repins, comments
 - internet service allowing users to post messages and images for their followers to see, e.g. followers, retweets, replies, clicks and click-through rate (CTR), impressions
 - online social networking site allowing users to create personal profiles, share photos and videos, and communicate with other users, e.g. total likes, reach, engaged users, people talking about this (PTAT), comments, shares.
- Using appropriate methods to present analytical data, e.g. tables, charts, graphs.

C5 Reviewing effectiveness of digital marketing communications against set objectives

- Analysing data and making recommendations by:
 - reviewing agreed criteria and digital marketing objectives
 - receiving feedback from others
 - suggesting practical areas for development
 - reflecting on own skills and setting SMART (specific, measurable, achievable, realistic, time-constrained) goals
 - carrying out split testing to identify the web page version with the best conversion rate for the target audience.

UNIT 3: CREATE DIGITAL MARKETING COMMUNICATIONS

Transferable skills

Communication

- Using digital marketing communications and channels for products and services.
- Communicating using electronic and social media through digital marketing communications and channels.

Developing practical and technical skills

- Demonstrating skills in creating digital marketing communications.
- Using resources appropriately in creating digital marketing communications.

Managing information

- Collecting and using information from different sources on the digital marketing communications.
- Representing information on products and services using digital marketing communications and channels.

Problem solving

- Coming up with ideas to create digital marketing communications.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Explore how digital marketing communications contribute to business success		
A.P1 Describe features of successful digital marketing communications for a selected product or service.	A.M1 Analyse how features of successful digital marketing communications were developed for a selected product or service.	A.D1 Evaluate features that make digital marketing communications successful for a selected product or service.
Learning aim B: Develop ideas for digital marketing communications for a selected product or service		
B.P2 Develop credible ideas for two digital marketing communications for a selected product or service.	B.M2 Develop realistic and appropriate ideas for two digital marketing communications for a selected product or service based on target audience, explaining reasons for ideas created to achieve digital marketing objectives.	B.D2 Develop creative and innovative ideas for two digital marketing communications for a selected product or service to reach a target audience, justifying reasons for ideas created to achieve digital marketing objectives.
B.P3 Describe reasons for ideas created to help achieve digital marketing objectives.		
Learning aim C: Create digital marketing communications for a selected product or service		
C.P4 Create three digital marketing personas, giving a basic representation of the target audience.	C.M3 Create three digital marketing personas that give a detailed representation of the target audience and allow the effective design and creation of two digital marketing communications for a selected product or service to meet specified objectives, and carry out optimisation using techniques and features effectively.	C.D3 Create three digital marketing personas that give a comprehensive representation of the target audience and allow the coherent design and creation of two digital marketing communications for a selected product or service to meet specified objectives, and carry out effective optimisation using advanced techniques and features, including a split test.
C.P5 Design and create two digital marketing communications for a selected product or service, using basic tools and techniques to meet specified objectives and carry out basic optimisation.		

Essential information for assessment decisions

Learners might select the products or services for their digital marketing communications, or use those given to them by tutors – but this must be agreed by tutors.

Learning aims A, B and C

For distinction standard, learners will:

- evaluate, drawing on varied information, to consider the significance of the features that make digital marketing communications successful for a selected product or service. Learners give a supported judgement showing relationship to its context in a conclusion
- develop ideas, using original and creative thinking, for two digital marketing communications for a selected product or service, by narrowing their focus to get their message out to target a specific audience. Learners are able to give evidence to support an opinion or prove their ideas are right or reasonable to successfully reach digital marketing objectives
- create three digital marketing personas that give full coverage of a range of factors related to representation of the target audience. The personas effectively detail a key segment of the target audience, including the key traits and profiles of a particular target audience, and how they might interact with digital marketing. Learners will consider additional persona information specific to own business' customers, e.g. hobbies, real quotes from interviews with customers
- design two digital marketing communications that are logical and hold together as a credible whole for a selected product or service to meet specified objectives. The design includes a feasible timeline, a detailed storyboard with justification of design decisions made and contingency plans to mitigate potential problems during the design and creation of digital marketing communications
- demonstrate effective technical ability when creating professional-looking digital marketing communications. Learners demonstrate a high level of certainty, consistency and familiarity in the process, making effective use of more advanced software tools and techniques to format and structure the digital marketing communications, including the use of movement/sound. Learners show full evidence of how their digital marketing communications suit the digital marketing personas and the specified objectives. The decisions made will show that full consideration has been given to branding and costs implications, showing any appropriate adjustments made to their design and why. Learners show full regard to ethical and legal considerations when creating digital marketing communications
- use at least two sophisticated optimisation techniques for each communication that are suitable for the communication channel selected, with the aim of generating more leads or increasing customer conversions or growing a product/service, e.g. split testing, Call-to-Action functions, adding keywords/tags.

For merit standard, learners will:

- analyse, presenting the outcome of methodical and detailed examination of information or data to interpret and study key trends and interrelationships of the features that make digital marketing communications successful for a selected product or service
- develop ideas that represent a selected product or service in a way that is accurate and true to life, selecting and using skills in ways that reflect the aim for two digital marketing communications based on the intended target audience. Learners give reasons or evidence to support an opinion, view or argument, and could show how conclusions are arrived at. They are able to show that they comprehend the origins, functions and objectives of the ideas and their suitability for purpose to successfully reach digital marketing objectives

- create three digital marketing personas that give many details, facts or information related to representation of the target audience. The personas detail a key segment of the target audience, including the key traits and profiles of a particular target audience and how they might interact with digital marketing
- show control over techniques, equipment and processes to efficiently meet the details and broad aims of the design for two digital marketing communications for a selected product or service to meet specified objectives. The design includes a feasible timeline, a detailed storyboard with comments on design features used and why, and a list of assets/resources required
- demonstrate appropriate technical ability when creating appropriate digital marketing communications. Learners demonstrate a level of certainty and familiarity in the process, making good use of software tools and techniques to format and structure their digital marketing communications. The decisions made will show the consideration given to branding and costs implications, with some adjustments made to their design. Learners show some regard to ethical and legal considerations when creating digital marketing communications
- use at least two enhanced optimisation techniques for each communication that are suitable for the communication channel selected, with the aim of generating more leads or increasing customer conversions or growing a product/service.

For pass standard, learners will:

- describe, giving a clear, objective account in their own words, covering breadth of content, showing recall and, in some cases application, of the relevant features of successful digital marketing communications for a selected product or service
- develop ideas, giving plausible evidence for why their ideas would work, for two digital marketing communications for a selected product or service. Learners will give a clear, objective account in their own words, covering breadth of content, showing recall and, in some cases application, of the reasons for ideas created that might partially achieve digital marketing objectives
- create three digital marketing personas, giving the essential facts or principles of the target audience. The personas contain only basic essential information of a segment of the target audience, and which might not carry much value in terms of specificity
- design digital marketing communications, including at least a timeline of what actions must be taken and when, and a storyboard of what their marketing communications will look like. Some design decisions made might show limited consideration of branding and costs and the specified objectives
- demonstrate some technical ability in using straightforward software tools and techniques to create eye-catching digital marketing communications. Learners make use of familiar techniques to format and structure the digital marketing communications. The design and creation of their communications use appropriate features and techniques, and show some consistency in branding of the product/service. There might be some inaccuracies in the content. The communications may not be effective in meeting the specified objectives and chosen persona but are sufficient enough to be considered appropriate. Learners pay little attention to ethical and legal considerations when creating digital marketing communications
- use at least two basic optimisation techniques for each communication that are suitable for the communication channel selected.

Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

The following scenario could be used to produce the required evidence for this unit. Centres are free to use comparable scenarios or other forms of evidence provided that they meet the assessment requirements of the unit.

Suggested scenario

You are working as an assistant in the marketing department of your local college. The marketing manager has asked you to design and create two digital marketing communications that promote the students' end-of-year show to internal and external audiences. The college already has an online presence through its website and across a range of social media networks; it also has a college blog.

Where learners have access to suitable work experience, most of the evidence for the assessment can be generated from the workplace. Engagement in workplace activities is valuable for demonstrating professional skills and abilities in communication.

If a retake is necessary, an alternative example must be used. The following is an example of a retake assessment activity.

A different scenario should be based on digital marketing communications, created for different purposes using different digital marketing channels.

Further information for tutors and assessors

Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

Introduction to unit

Tutors lead a discussion on the design and creation activities associated with creating digital marketing communications.

Learners complete worksheets on digital marketing communications and channels, and appropriate technology, software, resources and information required to create digital marketing communications.

Suggested time: about 4 hours.

Activity: Digital marketing communications

Tutor-led presentations relating to different types of digital marketing communications used by businesses.

Group discussions on external digital marketing communications, focusing on communications internal to a business.

Tutor-led discussions on the uses and objectives of digital marketing communications, and creativity and innovation when marketing products and services.

Learners explore and share examples of effective digital marketing communications and discuss successful elements of these communications and the importance of creating engaging and memorable communications.

Suggested time: about 8 hours.

Activity: Digital marketing channels

Tutor-led presentations relating to different types of digital communication channels used by businesses, including websites, social media networks, blogs and smartphone applications, and the features and functions of digital marketing channels.

Group discussions on external digital marketing channels, focusing on channels internal to a business.

Guest speakers from or site visits to digital marketing businesses, to allow learners to observe staff working with digital communication channels and to gain further knowledge on the decisions that are made depending on the channel used.

Discussions should draw out the importance of researching digital marketing channels before creating digital marketing communications and deciding what to include in research activities.

Suggested time: about 8 hours.

UNIT 3: CREATE DIGITAL MARKETING COMMUNICATIONS

Activity: How to design digital marketing communications

Tutor-led discussions on the importance of designing digital marketing communications and how to monitor costs and plan resource requirements, agreeing objectives and processes to ensure that communications are launched on time and meet legal and ethical requirements.

Learners to explore publicised costs of well-known digital marketing communications and consider the different costs associated with their development. Learners could practise keeping development costs down.

Tutor-led presentations on practical examples of designs would highlight effective design elements and how costs influence the design and creation of digital marketing communications. Learners could practise producing designs for given digital marketing communications.

Suggested time: about 6 hours.

Activity: Digital marketing communication tools, techniques and personas

Tutors can use published examples, where available, of successful digital marketing communications. The published examples should include different types of digital marketing communications, the design components, including the use of colour, text, images (static and moving) and sound, to give learners an understanding and appreciation of eye-catching and memorable digital marketing communications and how they are more likely to reach the target audience.

Group discussions on target audiences and how to identify the key traits and profiles of different target groups, and the importance of creating digital marketing personas.

In groups, learners could create personas based on the marketing of different products/services. Learners could be introduced to the link between the persona and the design and creation of digital marketing communications that are successful in reaching the target market.

Guest speakers from digital marketing agencies could provide practical demonstrations of the different digital marketing design tools and techniques used to develop communications. They could provide real work accounts on what needs to be considered in the design and development of communications, as well as how important it is to meet specified briefs and follow business branding guidelines.

Suggested time: about 8 hours.

Activity: How to optimise digital marketing communications

Tutor-led presentations on different types of digital marketing optimisation techniques and the respective digital marketing channels they can be applied to would provide a greater insight into the efforts that businesses make to widen the reach of digital marketing communications.

Group discussions on social media and website optimisation, to raise awareness of techniques widely applied by businesses that internet and social media users experience regularly, for example likes, shares, online reviews, pinning posts, checking into locations and businesses.

Learners can share their experiences and discuss well-known news articles and videos that have gone 'viral', providing links to optimisation. Learners can explore well-known businesses, celebrities and vloggers to explore optimisation techniques.

In groups, learners could carry out comparative studies on the difference in results between optimised digital marketing and those which have not been optimised. They could practise applying optimisation techniques to mock digital marketing communications.

Suggested time: about 8 hours.

Activity: How to measure the effectiveness of digital marketing communications

Group discussions to explore the different methods of collecting data on the success of digital marketing communications, including those typically used for analysing data from website traffic, social media interactions and how digital marketing communications have been optimised.

Learners could carry out activities that explore the purpose and features, and the pros and cons of data analytic tools, and how they differ according to the communication channel being used.

Tutor-led presentations on the increased use of data analytics in the marketing sector and how businesses now consider customer interaction and feedback as an essential aspect of their marketing activities. Case studies to explore how businesses use data analytic tools, for example measuring web page views, traffic sources and social media likes in identifying digital marketing communication successes. Learners should be given opportunities to practise using data analytic software and to interpret data to measure the effectiveness of digital marketing communications.

Suggested time: about 8 hours.

UNIT 3: CREATE DIGITAL MARKETING COMMUNICATIONS

Essential resources

For this unit, learners will need access to appropriate technology systems and software suited to the development and launch of live digital marketing communications, and to enable optimisation techniques. To demonstrate skills in meeting specified objectives, learners will need access to suitable and sufficient information in the form of realistic digital marketing briefs.

Links to other units

This unit has strong links to:

- Unit 1: Marketing in Business
- Unit 2: Research the Marketing of a Product or Service
- Unit 4: Plan and Present a Marketing Campaign.

Employer involvement

This unit would benefit from employer involvement in the form of suitable work experience. Where this is not feasible, simulations may be used. Employers must be involved in the assessment of learners, for example through:

- supporting the assessment process through providing realistic digital marketing communication briefs
- guest speakers who have used digital marketing communications to grow their businesses
- visits to local businesses to understand the importance of digital marketing optimisation
- support from local business staff as mentors.

Unit 4: Plan and Present a Marketing Campaign

Level: 2

Unit type: **Mandatory**

Assessment type: **Internal synoptic**

Guided learning hours: **60**

Unit in brief

Learners develop the skills needed to be able to use market research to develop and present a marketing campaign for a product or service appropriate to a specific target market.

Unit introduction

Creating marketing campaigns is an important part of selling and promoting successful products and services. Carrying out market research and preparing a marketing campaign, and sharing ideas with colleagues, can save time and money in deciding how products and services can be marketed to reach a specific target market.

In this unit, you will work to select and use suitable information to plan a marketing campaign aimed at a specific target market. You will gain practical skills in developing a marketing mix and materials for the marketing campaign to meet a specified brief. You will prepare and deliver a marketing campaign presentation to an audience and use feedback received to review the campaign. You will build on the knowledge and skills developed in *Units 1, 2 and 3* by using what you have learned in a specific context.

This unit will give you the knowledge, and personal and vocational skills and behaviours to progress towards roles such as marketing and branding assistant, and marketing and communications assistant in marketing departments or marketing agencies.

Learning aims

In this unit you will:

- A** Plan a marketing campaign for a product or service to target a specific market to meet a specified brief
- B** Create a marketing campaign to meet a specified brief
- C** Present a marketing campaign and review its success in meeting a specified brief.

Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
A Plan a marketing campaign for a product or service to target a specific market to meet a specified brief	A1 Identifying the brief and target market A2 Planning a marketing campaign	Marketing campaign plan and materials for a product or service idea. The materials must include market research collected, a plan and a marketing mix to meet a specified brief.
B Create a marketing campaign to meet a specified brief	B1 Selecting an appropriate marketing mix to the target market B2 Creating marketing materials appropriate for the specified brief and audience	
C Present a marketing campaign and review its success in meeting a specified brief	C1 Creating a presentation for the marketing campaign C2 Delivering a presentation for the marketing campaign C3 Using feedback to review and identify changes in the marketing campaign	Audio/video evidence of learners preparing and delivering a marketing campaign presentation to an audience, which can be supported by observation records. This needs to be followed by a reflective account on the success of the marketing campaign and on the learner's performance in delivering the presentation.
Key teaching areas in this unit include:		
Sector skills	Knowledge	Transferable skills/behaviours
<ul style="list-style-type: none"> Analysing findings Presenting findings Professional behaviour 	<ul style="list-style-type: none"> Marketing mix Types of information Sources of information Presentation formats 	<ul style="list-style-type: none"> Communication Preparing for work Managing information Self-management and development

Unit content

Knowledge and sector skills

Learning aim A: Plan a marketing campaign for a product or service to target a specific market to meet a specified brief

A1 Identifying the brief and target market

- Identifying the campaign brief, e.g. objectives, target market, budget, campaign rationale.
- Identifying target markets for a product or service for a specified brief, including:
 - identifying appropriate sampling techniques and size, e.g. random, stratified, systematic or cluster samples
 - identifying target markets using market segmentation, e.g. age, gender, socio-economic groups, income.

A2 Planning a marketing campaign

- Setting marketing aims and SMART (specific, measurable, achievable, realistic, time-constrained) objectives.
- Identifying the needs in the brief for the marketing campaign.
- Understanding customer wants and needs.
- Identifying and developing a new product or service.
- Improving profitability.
- Increasing market share.
- Diversification.
- Working within legal, regulatory and ethical requirements (current at time of delivery), including:
 - Sale of Goods Act 1979
 - Consumer Rights Act 2015
 - data protection legislation
 - advertising codes: Advertising Standards Authority (ASA) sets codes to make sure adverts across UK media adhere to the advertising rules
 - distinguishing between marketing materials from news and marketing materials from entertainment
 - treating consumers fairly, based on the nature of the consumer and product
 - being transparent about payments made to endorse their products.
- Setting and working to budgets, including:
 - considering the costs of promotional methods
 - budgeting
 - adverse and favourable variances
 - methods of managing a budget
 - working to timescales and timings of the campaign
 - identifying seasonal changes in demand
 - researching timescales
 - deciding on the timing of the marketing campaign
 - setting deadlines
 - time management skills
 - working towards and meeting deadlines.

Learning aim B: Create a marketing campaign to meet a specified brief**B1 Selecting an appropriate marketing mix to the target market**

- Selecting the seven Ps – product, place, price, promotion, physical evidence, people, processes:
 - product/service – the needs and requirements of the market, products or services already available on the market, the unique selling point (USP), quality of the product, packaging, brand image and personality, e.g. perception of a customer, a logo, a legal instrument, a company, a personality, a vision, an identity, an image
 - place – how and where to sell, using distribution channels, e.g. retail, wholesale, the internet, business to consumer (B2C), the shelf life of the product or service, internet versus ‘bricks and clicks’, passing trade and customer footfall
 - price and pricing strategies – price of competitors’ products and/or services, the costs of production, level of profit margin required, the level of demand from customers, choice of pricing strategies (penetration, skimming, competitor based, cost-plus, mark-up)
 - promotion – methods used by competitors, cost of the method, appropriate for the target market, how to reach your customers (advertising, public relations (PR), sponsorship, social and other media, personal selling, digital marketing, bricks and clicks (physical and internet presence))
 - physical evidence – managing the environment in which the product/service is being bought, the appearance of staff, how the technology will efficiently and appropriately support the marketing of the product/service, packaging to be used that meets customers’ needs and expectations
 - people – ensuring all staff have detailed knowledge of the product/service and of the branding and how this is being communicated to customers, detailed product/service knowledge through effective training, offering excellent customer service
 - processes – ensuring that the methods used to deliver the product/service to the customer are efficient, including how sales are handled, how orders are processed, how products/services are distributed, including on-time delivery and supportive and accessible after-sales service.

B2 Creating marketing materials appropriate for the specified brief and audience

- Creating digital marketing materials using electronic devices, online, mobile and onscreen, e.g.:
 - search engine optimisation and websites
 - social media marketing
 - search engine marketing and pay-per-click advertising
 - email marketing
 - blogs/vlogs, webinars, videos, podcasts.
- Creating offline marketing materials, e.g.:
 - promotional materials, including posters and banners
 - local and national newspaper advertisements
 - direct mail
 - mobile billboards
 - loyalty programmes
 - guerrilla marketing/flash mobs
 - visual merchandise
 - point of sales merchandise
 - competitions and contests
 - special offers, e.g. buy one get one free (BOGOF), money-off coupons, trial amounts of the product or service, discounted prices.

Learning aim C: Present a marketing campaign and review its success in meeting a specified brief

C1 Creating a presentation for the marketing campaign

- Creating a presentation, including:
 - a summary of the requirements of the brief provided, including the budget, timescale and objectives
 - the needs and requirements of the target market, based on research data
 - demonstration of the marketing methods to be used
 - methods to create attention, interest, desire, action (AIDA).

C2 Delivering a presentation for the marketing campaign

- Presentation, behaviour and conduct of presenter, including:
 - adopting positive attitude
 - being well prepared and planning
 - presenting a professional approach
 - considering the needs of the audience, e.g. class, teacher, local business person.
- Communication skills, including:
 - using language suitable for audience
 - using body language and gestures appropriately
 - using the voice to create and maintain interest, including voice projection
 - varying tone and using appropriate pace
 - using appropriate business terminology
 - handling questions courteously and appropriately.

C3 Using feedback to review and identify changes in the marketing campaign

- Gathering feedback from the presentation, e.g. using questionnaires, focus groups, question-and-answer sessions, suggestion boxes.
- Using feedback to review the marketing campaign and to identify changes based on feedback, e.g.:
 - reviewing the quality of the product or service
 - reviewing the promotional methods and materials used
 - reviewing the distribution channels and place the product or service is sold
 - reviewing the price of the product or service and the pricing strategy used.
- Analysing the appropriateness of the marketing campaign, and marketing materials, based on:
 - achieving the specified brief
 - meeting the campaign's objectives
 - meeting the budget
 - meeting the timescales and timings
 - meeting the needs of the target market
 - appealing to the audience.
- Using feedback from the presentation audience to reflect on own performance:
 - reviewing the behaviours and the types and level of skills used in the presentation
 - reviewing own role and responsibilities, including planning, creating and delivering the presentation
 - reviewing skills in dealing with problems, e.g. correcting mistakes, answering questions
 - identifying own strengths and areas for improvement, e.g. skills, knowledge, experience.

Transferable skills

Communication

- Writing marketing campaign materials and present, to convey meaning.
- Speaking and listening to others in gathering market feedback.
- Using body language to help communication in presenting a marketing campaign.
- Communicating in a variety of ways, including electronic and social media to create marketing campaign materials.

Preparing for work

- Planning and undertaking activities to prepare marketing campaign materials.
- Self-reviewing and assessing own performance in the presenting of a marketing campaign.

Managing information

- Analysing market research results to make decisions.
- Using IT to create marketing campaign materials.
- Representing information in different ways to maintain audience interest and support decisions made.
- Organising information to create a marketing campaign, and to support decisions made.

Self-management and development

- Self-presentation in creating a positive image of a marketing campaign.
- Reviewing own performance on the basis of constructive feedback from an audience.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Plan a marketing campaign for a product or service to target a specific market to meet a specified brief		
A.P1 Produce a brief marketing campaign plan, using research collected to meet the basic requirements of a specified brief.	A.M1 Plan a detailed marketing campaign, selecting appropriate research and including many of the requirements to meet a specified brief.	A.D1 Plan a comprehensive marketing campaign, using research and including the full requirements to justify why they are suitable to meet a specified brief.
Learning aim B: Create a marketing campaign to meet a specified brief		
B.P2 Develop an appropriate marketing mix, using a few techniques for a product or service idea.	B.M2 Create a detailed marketing campaign, using appropriate marketing mix techniques for a product or service idea aimed at a target market to meet many of the requirements of a specified brief.	B.D2 Create a comprehensive marketing campaign, justifying choice of marketing mix and marketing campaign materials for a product or service idea aimed at a target market to fully meet the requirements of a specified brief.
B.P3 Create marketing materials to meet the basic requirements of a specified brief.		
Learning aim C: Present a marketing campaign and review its success in meeting a specified brief		
C.P4 Prepare and deliver a clear marketing campaign presentation to an audience that contains key features, supported by relevant documents.	C.M3 Prepare and deliver a clear and structured marketing campaign presentation, responding to audience questions appropriately and reflecting on feedback and own performance to explain improvements.	C.D3 Prepare and deliver a confident and well-structured marketing campaign presentation, exploring aspects that are questioned by the audience, analysing the campaign based on presentation feedback and own performance, and justifying a set of recommendations.
C.P5 Use presentation feedback to make changes to the marketing campaign.		

Essential information for assessment decisions

Learners must meet the requirements of the specified brief. These requirements must be part of the assignment brief and not devised by learners.

The product or service idea and target market must be agreed with tutors and employers.

Learning aims A and B

For distinction standard, learners will:

- produce a comprehensive marketing campaign plan that is well developed and contains full coverage of factors and information, including the objectives, timescales and budgets, and which considers legal, regulatory and ethical requirements, and explain how the campaign fully meets the needs of the target market. This will include a justification of the needs of the target market and how the marketing campaign will meet their needs and support the product or service idea
- create a well-structured marketing campaign that will be coherent, with sections that clearly relate to each other. There will be evidence that the campaign has been well thought through, as all evidence should be relevant and should add to the logic of the plan
- include a balance of the marketing mix, providing well-reasoned justifications for their use and an evaluation of how the marketing mix meets the needs of the target market
- create a range of well-produced marketing materials, including both digital and offline resources, and provide well-reasoned justifications for their use.

For merit standard, learners will:

- provide a detailed marketing campaign plan that contains many factors and information, including the objectives, timescales and budget, but is missing some elements. The plan will also consider legal, regulatory and ethical requirements. Reasons will be provided for the decisions made and the needs of the target market for the product or service idea
- create a detailed marketing campaign that includes an appropriate balance of product, place, price and promotion, giving brief reasons for their use
- include a balance of the marketing mix, providing an explanation for their use and how the marketing mix meets the needs of the target market
- create examples of marketing materials, including both digital and offline resources, that are appropriate to the requirements of the marketing campaign brief and which meet the needs of the target market.

For pass standard, learners will:

- provide a brief marketing campaign plan, which will contain some factors and information, including the objectives and timescales, and which meets basic but adequate needs of the target market identified, but gives only brief consideration to legal, regulatory and ethical requirements. Learners will give some indications on possible changes in their idea and identify the target market for the product or service idea
- develop an appropriate marketing mix and examples of the marketing resources to be used
- create a marketing campaign based on the brief provided, producing examples of marketing materials to support the marketing campaign – materials could include both digital and offline resources.

Learning aim C

For distinction standard, learners will:

- prepare a presentation on the key elements of their marketing campaign, and present the marketing materials to an audience. The presentation will have a business-like approach and learners will demonstrate suitable communication skills to the audience. The presentation will be delivered confidently and professionally. Learners will provide speaker notes and audio/video evidence of preparing and delivering the presentation to an audience, accompanied by detailed observation records
- respond fully and appropriately to questions, using the opportunity to gather substantial feedback on the marketing campaign
- undertake an analysis of the marketing campaign, based on feedback from the presentation audience, and comment and add to their plan with suggested changes. Learners may take the opportunity to revise their original marketing campaign after receiving feedback or they may comment on the feasibility of the proposal, perhaps opting to change aspects of their plan such as the target market or the timescale
- produce comprehensive content for the marketing campaign, and respond to the feedback they receive, reassessing their skills and identifying realistic and achievable actions for improvements.

For merit standard, learners will:

- prepare a presentation and use it to deliver the key elements of their marketing campaign, and present the marketing materials to an audience. The presentation will be clear and structured but learners may not always deliver confidently. Learners will provide speaker notes and audio/video evidence of preparing and delivering the presentation to an audience, accompanied by observation records
- respond to audience questions appropriately but will not explore questions with the audience
- review presentation feedback to judge the success of the marketing campaign and the marketing materials, and provide a series of recommendations for improvements
- produce detailed content for the marketing campaign that is a reflection of their own contribution, and suggest areas where they could improve their skills in delivering the presentation, to support the development of the marketing campaign.

For pass standard, learners will:

- prepare a presentation to deliver to an audience. The presentation will include the key elements of their marketing campaign and materials, and be appropriate for the audience. Learners will provide audio/video evidence of preparing and delivering the presentation to an audience, accompanied by observation records
- comment on the success of the marketing campaign and the marketing materials, based on feedback they receive from the presentation audience
- produce appropriate content for the marketing campaign that it is a judgement of own performance based on feedback from the audience.

Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

The following scenario could be used to produce the required evidence for this unit. Centres are free to use comparable scenarios or other forms of evidence provided that they meet the assessment requirements of the unit.

Suggested scenario

Your tutor will provide a brief for a marketing campaign for a selected product or service. The brief will be either a real marketing campaign commissioned by a real business or one simulated with the support of an employer. You will select an appropriate marketing mix and create a marketing campaign, including appropriate marketing materials. You will present the marketing campaign to your manager and other members of the team, gathering their feedback and using it to reflect on your marketing campaign. You will review your own performance, making recommendations for improvements. When demonstrating your skills, your performance will be observed by either your tutor, who will take on the role of your supervisor/manager, or an employer from the marketing sector.

If a retake is necessary, an alternative example must be used. The following is an example of a retake assessment activity.

A different scenario should be used based on a different business and product or service idea.

Further information for tutors and assessors

Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

Introduction to unit

An introduction to the importance of planning a marketing campaign, and what it should include. Examples of marketing campaigns for a range of products or services could be used and areas for improvements could be identified. Learners could take notes to prepare them for their own marketing campaigns.

Suggested time: about 4 hours.

Activity: How to plan for marketing campaigns

Tutor-led discussion on aims and objectives, budgets, timescales and target markets.

This could be followed by individual learner work on their plans for marketing campaigns.

Suggested time: about 8 hours.

Activity: How to use the marketing mix

Group discussion on the marketing mix used by businesses working in the same sector or which provide a similar product or service.

This could be extended to allow learners time to develop their ideas for the marketing mix to be used for their own product or service.

Suggested time: about 8 hours.

Activity: How to create marketing materials

Tutor-led discussion on a range of offline marketing materials based on examining those used by well-known businesses in a similar sector.

Learners practise creating offline marketing materials based on their product or service idea in small groups, gathering feedback from others on areas for improvement.

Suggested time: about 8 hours.

Activity: How to present self for delivering a presentation

Tutors can use published examples, where available, of scenarios that include effective presentation skills.

In groups, learners could practise skills in presenting their ideas, using easy topics provided by the tutor. Feedback could be given by peers.

Suggested time: about 8 hours.

Activity: How to prepare the presentation

Tutors can use published examples, where available, of presentations. This could be followed by individual learner work on the presentation.

Suggested time: about 8 hours.

UNIT 4: PLAN AND PRESENT A MARKETING CAMPAIGN

Activity: Workshop on reflection on their plan for a marketing campaign

Group discussion on the feedback for learners' plans for the marketing campaign.

This could be followed by individual work, with learners refining their plans for their marketing campaigns.

Time should be given for learners to reflect on their own performance using feedback from others, identifying areas for improvement.

Suggested time: 6 hours.

Links to other units

This unit draws on the knowledge and skills taught in:

- Unit 1: Marketing in Business
- Unit 2: Research the Marketing of a Product or Service
- Unit 3: Create Digital Marketing Communications.

Employer involvement

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

- guest speakers from relevant marketing departments
- work experience in relevant marketing roles
- support from local marketing staff as mentors
- marketing staff running workshops on the use of marketing in business.

4 Planning your programme

Is there a learner entry requirement?

As a centre, it is your responsibility to ensure that recruited learners 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 1.

Learners are most likely to succeed if they have:

- three or four GCSEs at intermediate grades; and/or
- BTEC qualification(s) achieved at least at Level 1
- at least Level 1 equivalent achievement in English and mathematics through GCSE or Functional Skills.

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

What is involved in becoming an approved centre?

All centres must be approved before they can offer this qualification – so that you are ready to assess learners and so that we can provide the support needed. Further information is given in *Section 8 Administrative arrangements*.

What level of sector knowledge is needed to deliver this qualification?

We do not set any requirements for tutors but expect centres to assess the overall skills and knowledge of the teaching team to ensure that they are relevant and up to date with current industry practice. This will give learners a rich programme to prepare them for progression.

What resources are required to deliver this qualification?

As part of your centre approval, you will need to show that the necessary material resources and workspaces are available to deliver the qualification. For some units, specific resources are required.

What makes good vocational teaching?

The approach to vocational teaching must be led by what is right for the particular sector. Therefore, each unit includes delivery guidance and suggested assessment tasks. Using the delivery guidance and suggested assessment tasks and our additional free delivery guidance and assignment briefs, you can build a course that contextualises learning in real-life and/or employment scenarios. This will draw in naturally the kind of broader attributes valued in the sector, for example good communication skills and creativity, as well as the more general skills needed in work that fit well with project-based learning, for example teamwork and independent learning.

What are the requirements for meaningful employer involvement?

This qualification has been designed as a Technical Certificate qualification and as an approved centre you are required to ensure that during their study, every learner has access to meaningful activity involving employers. See *Section 2 Structure* and *Section 9 Quality Assurance* for the requirements for employer involvement.

Support for employer involvement

It is important that you give learners opportunities which are of 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. See *Section 11 Resources and support* for details of the support available, including the Work Experience Toolkit.

What support is available for delivery and assessment?

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

To support you with planning your assessments, you will be allocated a Standards Verifier early in the planning stage. There will be extensive training programmes and support from our Subject Advisor team.

For further details see *Section 11 Resources and support*.

How will my learners become more employable through this qualification?

This qualification is mapped to the Marketing National Occupational Standards.

Learners will be acquiring the key technical and sector knowledge, and practical and technical skills that employers need. Employability skills, such as teamwork and communication, and completing realistic tasks have been built into the design of the learning aims and content. This gives tutors 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

The BTEC Level 2 Technical Certificate in Marketing is assessed using a combination of *internal assessments*, which are set and marked by tutors, and an *external assessment*, which is set and marked by Pearson.

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

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.

One internally-assessed unit in the qualification is defined as synoptic (see *Section 2 Structure*). A synoptic assessment is one that a learner should take later in a programme and in which they will be expected to apply learning from a range of units. As such, you must plan the assignments so that learners can demonstrate learning from across their programme.

We have addressed the need to ensure that the time allocated to final assessment of internal and externally-assessed 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 8 Administrative arrangements*.

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*, available on our website. All members of the assessment team need to refer to this document.

For this qualification, 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. You 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

Our approach to internal assessment for this qualification 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 8 Administrative arrangements*.

Operating internal assessment

The assessment team

It is important that there is an effective team for internal assessment so that all assessment is planned and verified. For this qualification, it is likely that the team will be small but it is still necessary to ensure that the assessment process is followed. Full information is given in the *Pearson Quality Assurance handbook*.

The key roles are:

- the Lead Internal Verifier (Lead IV) for the qualification has responsibility for the planning, record keeping and standard setting for the qualification. The Lead IV registers with Pearson annually and organises training using our support materials
- Internal Verifiers (IVs) check that assignments and assessment decisions are valid and that they meet our requirements. In a small team, all people will normally be assessors and IVs. No one can verify their own actions as an assessor
- assessors set or use assignments to assess learners to national standards.

Planning and record keeping

The Lead IV should make sure that there is a plan for assessment of the internally-assessed units and 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 Guide to Quality Assurance*.

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 11 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 qualification. 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 they 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.

You are encouraged to employ a range of formative assessment approaches before putting learners through to the assignments to formally assess the units. Formative assessment supports teaching and learning, and should be ongoing throughout the learning process. It enables tutors to enhance learning by giving learners constructive feedback so that they can identify their strengths and weaknesses, and to put measures in place to target areas that need work. Formative assessment approaches that incorporate reflective learning and regular skills assessment are important in encouraging self-development and reflective practice, to ensure that learners progress.

Setting assignments

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. This assignment will be separate from the practice and exploration activities that have been used during the learning period, and learners must understand that the assignment is being used to judge the learning aims. 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.

When setting your assignments, you need to work with the information given in the *Essential information for assessment decisions* and the *Assessment activity* sections of the units. You can choose to use the suggested scenarios or to adapt them to take account of local circumstances, provided that assignments are verified.

In designing your own assignment briefs you should bear in mind the following points.

- A learning aim must always be assessed as a whole and must not be spilt into two or more tasks.
- 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 to do so.
- Learners should be given clear tasks, activities and structures for evidence; the criteria should not be given as tasks.
- You must ensure that assignments for synoptic assessment are designed to enable learners to draw on the specific units identified and demonstrate that they can identify and use effectively an appropriate selection of skills, techniques, concepts, theories and knowledge in an integrated way. Assignments for the synoptic unit will be monitored at programme level as part of the standards verification process to ensure that they encourage learners to select and apply their learning from across the qualification in an integrated way.
- Where there is a requirement for assessment to be conducted in the real work environment (mandatory work placement), assignments must be designed to facilitate this. Where there is no mandatory requirement for workplace assessment but learners will be in work placement or work experience settings as a part of the programme, then it would be worthwhile if these assignments were also designed for completion in the real work environment. You must ensure that the work placement or work experience setting gives learners the opportunity to achieve at all grade levels.

As assignments provide a final assessment, they will draw on the specified range of teaching content for the learning objective. The specified teaching 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 a practical performance, then they must address all the relevant range of content that applies in that instance.

An assignment brief should have:

- a vocational scenario or context that motivates the learner to apply their learning through the assignment
- an audience or purpose for which the evidence is being provided
- clear instructions to the learner about what they are required to do, normally set out through a series of tasks.

Forms of evidence

The units allow for a variety of forms of evidence to be used, provided that they are suited to the type of learning aim and the learner being assessed. For most units, the practical demonstration of skills is necessary. The units give you information on suitable forms of evidence that would give learners the opportunity to apply a range of transferable and sector skills. Centres may choose to use different suitable forms for evidence from those proposed. Overall, learners should be assessed using varied forms of evidence.

The main forms of evidence include:

- observation and recordings of practical tasks or performance in the workplace with supporting evidence
- projects
- recordings of role play, interviews and other types of simulated activity
- oral or written presentations with assessor questioning
- work logbooks and reflective journals.

It is important to note that an observation record is a source of evidence and does not confer an assessment decision. It must be sufficiently detailed to enable others to make a judgement about the quality and sufficiency of the performance and must document clearly the rationale for the assessment decision. Observation records should be accompanied by supporting evidence, which may take the form of videos, audio recordings, photographs, preparation notes, learner logs and other similar types of record.

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
- the learner to produce evidence that is their own independent work
- a verifier to independently reassess the learner to check the assessor's decisions.

Centres need to take particular care in ensuring that learners produce independent work.

Making valid assessment decisions

Assessment decisions through applying unit-based criteria

Assessment decisions for this qualification are based on the specific criteria given in each unit and set at each grade level. The way in which individual units are written provides a balance of assessment of sector-specific knowledge, technical and practical skills, and transferable skills appropriate to the purpose of the qualification.

Pass, Merit and Distinction criteria all relate to individual learning aims. The assessment criteria for a unit are hierarchical and holistic where, in satisfying the M criteria, a learner would also have satisfied the P criteria. The unit assessment grid shows the relationships of the criteria so that assessors can apply all the criteria to the learner's evidence at the same time.

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 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 all 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 all 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 2 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.

Making assessment decisions using criteria

As an assessor, you review authenticated learner work and make judgements on standards using the assessment criteria and the supporting information provided in units and training materials. 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.

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

- the *Essential information for assessment decisions* section in each unit
- your Lead IV and assessment team's collective experience, supported by the standardisation materials we provide.

Once the team has agreed the outcome, a formal assessment decision is recorded and reported to learners. The information given:

- must show the formal decision and indicate where criteria have been met
- may show where attainment against criteria has not been demonstrated
- must avoid giving direct, specific instructions on how the learner can improve the evidence to achieve a higher grade.

Authenticity of learner 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.

Once an assessment has begun, learners must not be given feedback that relates specifically to their evidence and how it can be improved, learners must work independently.

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 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 8: Administrative arrangements*.

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 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 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.

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 did not complete assignments by your planned deadline or an authorised extension deadline, if one was given for specific circumstances, may not have the opportunity to subsequently resubmit. Similarly, learners who submit work that is not their own should not be given an opportunity to resubmit.

The outcome of any resubmission of the assignment by the learner is then recorded as the final decision.

A learner who has not achieved their expected level of performance in the relevant learning aims **after resubmission** of an assignment may be offered a single retake opportunity using a new assignment. The highest grade that may be awarded is a Pass.

The Lead IV must authorise a retake with a new assignment only in exceptional circumstances and where 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* available on our website. We provide information on writing assignments for retakes on our website (please go to www.btec.co.uk/keydocuments).

7 External assessment

A summary of the type and availability of external assessment for this qualification is given below. This external assessment assesses a unit that is 25% of the total qualification GLH and is weighted to contribute the same proportion of the overall qualification grade.

See the units and sample assessment materials for more information.

Unit	Type	Availability
Unit 1: Marketing in Business	<ul style="list-style-type: none"> • Onscreen test set and marked by Pearson. • 75 minutes. • 60 marks. 	On demand. First assessment March 2019.

For Unit 1, onscreen tests are available on demand starting from March 2019. These tests use a range of question types, including examiner marked. As tests have a full marking process, results for individual learners will be released once the process is complete and the time to issue results will vary.

We will provide annually, in our *Information Manual*, a detailed timetable for entries, assessment and results. Resits cannot be scheduled until a learner's result has been issued.

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 required learning time and opportunities for resits. Learners who take an external assessment and who do not perform as expected may have one further opportunity using a later external assessment.

Learners who attempt an external assessment twice will have the better of the grades achieved used in the final grade calculation for the qualification.

Units

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. The ways in which learners are assessed are shown through the assessment outcomes and grading descriptors.

Sample assessment materials

Each externally-assessed unit has a set of sample assessment materials (SAMs) that accompanies the 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.

The SAMs show the range of possible activity types that may appear in the actual assessments and 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 activities will vary in each assessment.

These sample assessments can be downloaded from our website.

Conducting external assessments

Centres must make arrangements for the secure delivery of external assessments. You need to ensure that learners are aware that they need to work independently and that they are aware of the requirements for any external assessment.

Each external assessment has a defined degree of control under which it must take place. We define degrees of control as follows.

High control

This is the completion of assessment in formal invigilated examination conditions. It applies to onscreen tests.

8 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 our *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 certificates are issued on time to allow learners to progress to chosen progression opportunities.

Our equality policy requires that all learners 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 (as defined by the Equality Act 2010) 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 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 our *Information Manual*. Records must be maintained as specified as we may ask to audit them.

Reasonable adjustments to assessment

To ensure that learners have fair access to demonstrate the requirements of the assessments, a reasonable adjustment is one that is made before a learner takes an assessment. 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 *Supplementary guidance for reasonable adjustments 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 only 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 being conducted unfairly. 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 our policy *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. Learners are permitted to have one resit of an external assessment.

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 in place 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
- effectiveness of the adjustment
- cost of the adjustment; and
- 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.

Dealing with malpractice in assessment

Malpractice means acts that undermine the integrity and validity of assessment, 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 our *Centre guide for 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. Our *Centre guide for dealing with malpractice and maladministration in vocational qualifications* 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* (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* and emailing it and any accompanying documents (signed statements from the learner, invigilator, copies of evidence, etc.) to the Investigations Team at pqsmalpractice@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)* with supporting documentation to 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 6.15 of *JCQ Suspected Malpractice in Examinations and Assessments*.

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.

We reserve the right to withhold certification when undertaking investigations, audits and quality-assurance 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 or 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 who will inform you of the next steps.

Certification and results

Once a learner has completed all the required units for a qualification, even if final results for external assessments have not been issued, then 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

Results for external assessment will be issued once marking is complete.

Qualification results will be issued once a learner has completed all components of the qualification and you have claimed certification. 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. Our *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 firstly need to decline their overall qualification grade. You must 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*: 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 and a full list of our regulatory policies can be found on our website.

9 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, internal verification and planning of appropriate employer involvement.

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 Technical Certificate and Diploma qualifications 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
- undertaking an overarching review and assessment of a centre's strategy for ensuring sufficient and appropriate engagement with employers at the beginning of delivery of any BTEC programme(s)
- undertaking a review of the employer involvement planned at programme level to ensure its appropriateness at a time when additional activities can be scheduled where necessary
- 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.

Centres that do not fully address and maintain rigorous approaches to delivering, assessing and quality assurance cannot seek certification for individual programmes or for the BTEC Technical Certificate and Diploma qualifications. 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.

10 Understanding the qualification grade

Awarding and reporting for the qualification

This section explains the rules that we apply in providing an overall qualification grade for each learner. The final grade awarded for a qualification represents a holistic performance across all of 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 will be balanced by a lower outcome in others.

Eligibility for an award

In order to be awarded the qualification, a learner must complete all units and achieve a Pass or above in all units. See *Section 2 Structure* for full details.

To achieve the qualification grade, learners must:

- achieve and **report a grade** (D, M or P) for all units within a valid combination
- achieve the **minimum number of points** at a grade threshold.

Where there are optional units in a qualification, it is the responsibility of the centre to ensure that a correct unit combination is adhered to. Learners who do not pass all the required units shown in the structure will not achieve the qualification. For example, learners who have not passed the required externally-assessed unit or who have not taken enough mandatory units will not achieve that qualification even if they have enough points.

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 (where available), 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.

The qualification is awarded at the grade ranges shown in the table below.

Qualification	Available grade range
Certificate	P to D

The *Calculation of qualification grade* table, which appears later in this section, shows the minimum thresholds for calculating these grades. The table will be kept under review over the lifetime of the qualification. In the event of any change, centres will be informed before the start of teaching for the relevant cohort and an updated table will be issued on our website.

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. Our *Information Manual* gives full details.

Points available for internally-assessed units

The table below shows the number of **points** available for internally-assessed units. For each internally-assessed unit, points are allocated depending on the grade awarded.

		Unit size
		60 GLH
U		0
Pass		16
Merit		24
Distinction		32

Points available for the externally-assessed unit

Raw marks from the externally-assessed unit will be awarded **points** based on performance in the assessment. The points scores available for the externally-assessed unit at grade boundaries are as follows.

		Unit size
		60 GLH
U		0
Pass		16
Merit		24
Distinction		32

We will automatically calculate the points for the externally-assessed 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, we will automatically calculate the qualification grade for your learners when the internally-assessed 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 table

Certificate	
Grade	Points threshold
P	64
M	88
D	112

The table is subject to review over the lifetime of the qualification. The most up-to-date version will be issued on our website.

Examples of grade calculations based on table applicable to registrations from September 2018

Example 1: Achievement of a Certificate with a P grade

Unit	GLH	Type	Grade	Points
1	60	External	Pass	16
2	60	Internal	Pass	16
3	60	Internal	Pass	16
4	60	Internal	Pass	16
	240		PP/P	64

The learner has achieved a Pass or above in all units.

The learner has sufficient points for a P grade.

Example 2: Achievement of a Certificate with a D grade

Unit	GLH	Type	Grade	Points
1	60	External	Merit	24
2	60	Internal	Distinction	32
3	60	Internal	Distinction	32
4	60	Internal	Distinction	32
	240		DD/D	120

The learner has sufficient points for a D grade.

Example 3: Achievement of a Certificate with an Unclassified result

Unit	GLH	Type	Grade	Points
1	60	External	Merit	24
2	60	Internal	Distinction	32
3	60	Internal	Unclassified	0
4	60	Internal	Distinction	32
	240		U	88

The learner has a U in Unit 3.

The learner has sufficient points for an M but has not met the requirement for a Pass or above in all units.

11 Resources and support

Our aim is to give you support to enable you to deliver Pearson BTEC Level 2 Technicals with confidence. You will find resources to support teaching and learning, assessing, and professional development on our website.

Support for setting up your course and preparing to teach

Schemes of Learning

Our free Schemes of Learning give you suggestions and ideas for how to deliver the units in the qualifications, including opportunities to develop employability skills, tips on embedding mathematics and English, and how to link units through holistic assessments.

Delivery planner

High-level models showing how the course can be delivered over different timescales, for example six months, one year, two years.

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 BTEC qualifications 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 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.

Support for teaching and learning

Work Experience Toolkit

Our free Work Experience Toolkit gives guidance for tutors, assessors, work-based supervisors and learners on how to make the most of work placements and work experience.

Pearson Learning Services provides a range of engaging resources to support BTEC qualifications.

Teaching and learning resources may also be available from a number of other publishers.

Details of Pearson's own resources and of all endorsed resources are on our website.

Support for assessment

Sample assessment materials for externally-assessed units

Sample assessment materials (SAMs) are available for externally-assessed units and can be downloaded from the Pearson Qualifications website. An additional set of sample assessment materials for externally-assessed units will also be available, giving your learners further opportunities for practice.

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.

We provide assignment briefs approved by Pearson Standards Verifiers.

Sample marked learner work

To support you in understanding the expectation of the standard at each grade, examples of sample marked learner work will be made available on our website.

Training and support from Pearson

People to talk to

There are lots of people who can support you and give you advice and guidance on delivering your Pearson BTEC Level 2 Technicals. They include the following.

- Standards Verifiers – they can support you with preparing your assignments, ensuring that your assessment plan is set up correctly, in preparing learner work and providing quality assurance through sampling.
- 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.
- Curriculum Development Managers (CDMs) – they are regionally based and have a full overview of 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

We provide a range of training and professional development events to support the introduction, delivery, assessment and administration of the Pearson BTEC Level 2 Technicals.

These sector-specific events, developed and delivered by specialists, are available both face to face and online.

The top half of the page features a digital marketing-themed background. It shows two hands reaching towards a central glowing globe of interconnected nodes. Various icons representing digital marketing concepts are scattered around the globe, including a location pin, a person in a suit, a microphone, a play button, a shopping cart, an envelope, a computer monitor, a bar chart, and a document with a pencil.


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