Pearson BTEC Level 2 Certificate in Principles of Marketing

Specification

BTEC specialist qualification

First teaching December 2011

Issue 4

Edexcel, BTEC and LCCI qualifications

Edexcel, BTEC and LCCI qualifications are awarded by Pearson, the UK's largest awarding body offering academic and vocational qualifications that are globally recognised and benchmarked. For further information, please visit our qualifications website at qualifications.pearson.com. Alternatively, you can get in touch with us using the details on our contact us page at qualifications.pearson.com/contactus

About Pearson

Pearson is the world's leading learning company, with 35,000 employees in more than 70 countries working to help people of all ages to make measurable progress in their lives through learning. We put the learner at the centre of everything we do, because wherever learning flourishes, so do people. Find out more about how we can help you and your learners at qualifications.pearson.com

This specification is Issue 4. Key changes are summarised on the next page and are also sidelined. We will inform centres of any changes to this issue. The latest issue can be found on our website: qualifications.pearson.com

This qualification was previously known as:

Pearson BTEC Level 2 Certificate in Principles of Marketing (QCF)

The QN remains the same.

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

All information in this specification is correct at time of publication.

ISBN 9781446949252

Summary of Pearson BTEC Level 2 Certificate in Principles of Marketing specification Issue 4 changes

Summary of changes made between previous Issue 3 and this current Issue 4	Page/section number
All references to QCF have been removed throughout the specification	Throughout
Definition of TQT added	Section 1
Definition of sizes of qualifications aligned to TQT	Section 1
TQT value added	Section 2
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	Section 2
Reference to credit transfer within the QCF removed	Section 6
QCF references removed from unit titles and unit levels in all units	Section 11
Guided learning definition updated	Section 11

Earlier issue(s) show(s) previous changes.

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

Contents

Purpose of this specification

This specification gives information about:

- the qualification’s objective
- any other qualification that a learner must have completed before taking this qualification
- any prior knowledge, skills or understanding which the learner is required to have before taking the qualification
- any units that a learner must have completed before the qualification will be awarded and any optional routes
- any other requirements that a learner must have satisfied before they will be assessed or before the qualification will be awarded
- the knowledge, skills and understanding which will be assessed as part of the qualification (giving a clear indication of their coverage and depth)
- the method of any assessment and any associated requirements relating to it
- the criteria against which a learner’s level of attainment will be measured (such as assessment criteria).

1 Introducing BTEC Specialist qualifications

BTEC Specialist qualifications are work-related qualifications available from Entry to Level 3 in a range of sectors. They give learners the knowledge, understanding and skills they need to prepare for employment in a specific occupational area. The qualifications also provide career development opportunities for those already in work. The qualifications may be offered as full-time or part-time courses in schools or colleges. Training centres and employers may also offer these qualifications.

Sizes of Specialist qualifications

For all regulated qualifications, we specify a total number of hours that learners are expected to undertake in order to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, we identify the number of Guided Learning Hours (GLH) that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

As well as guided learning, there may be other required learning that is directed by tutors or assessors. This includes, for example, private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

BTEC Specialist qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

2 Qualification summary and key information

Qualification title	Pearson BTEC Level 2 Certificate in Principles of Marketing
Qualification Number (QN)	600/3575/4
Date registrations can be made	01/12/2011
Age range that the qualification is approved for	14-16 16-18 19+
Credit value	15
Assessment	Centre-devised assessment (internal assessment)
Total Qualification Time (TQT)	150
Guided learning hours	116
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow the Pearson Access and Recruitment policy (see Section 9, Access and Recruitment)

Qualification title and Qualification Number

Centres will need to use the Qualification Number (QN) when they seek public funding for their learners. The qualification title, unit titles and QN are given on each learner's final certificate. You should tell your learners this when your centre recruits them and registers them with us. There is more information about certification in our *UK Information Manual,* available on our website, qualifications.pearson.com

Objective of the qualification

The Pearson BTEC Level 2 Certificate in Principles of Marketing is for learners who work in, or want to work in, marketing, for example as a marketing assistant, market research assistant or events management assistant.

It gives learners the opportunity to:

- develop knowledge related to marketing, including marketing theory, digital marketing, market research and how to manage customer relationships
- learn about the legal framework in which marketing operates and also about how legislation and personal responsibilities govern behaviour in the workplace
- achieve a nationally-recognised level 2 qualification.

Apprenticeships

The Council for Administration (CfA) has approved this qualification as a knowledge component for the Intermediate Apprenticeship in Marketing.

Progression opportunities through Pearson qualifications

Learners who have achieved the qualification can progress on to the Pearson Edexcel Level 2 NVQ Certificate in Marketing and then the Pearson BTEC Level 3 Certificate in Principles of Marketing.

Industry support and recognition

This qualification is supported by the Council for Administration, the SSC for marketing and other business-related areas.

Relationship with National Occupational Standards

This qualification relates to the National Occupational Standards in Marketing. The mapping document in *Annexe A* shows the links between the units within this qualification and the National Occupational Standards.

3 Centre resource requirements

As part of the approval process, centres 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 occupational experience.
- There must be systems in place to ensure the continuing professional development for staff delivering the qualification.
- Centres must have appropriate health and safety policies in place.

4 Qualification structure

Pearson BTEC Level 2 Certificate in Principles of Marketing

The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

Minimum number of credits that must be achieved	15
Number of mandatory credits that must be achieved	10
Number of optional credits that must be achieved	5

Unit	Unit reference number	Mandatory units	Level	Credit	Guided learning hours
1	D/502/9928	Principles of Marketing Theory	2	4	30
2	F/502/8206	Understanding Legal, Regulatory and Ethical Requirements in Sales or Marketing	2	2	15
3	L/601/7638	Principles of Personal Responsibilities and Working in a Business Environment	2	4	32
		Optional units			
4	D/502/9931	Principles of Digital Marketing	2	5	40
5	K/502/9933	Principles of Market Research	3	5	40
6	K/503/8194	Principles of Customer Relationships	2	3	18
7	F/502/8223	Understanding the Relationship Between Sales and Marketing	3	3	21

5 Assessment

The table below gives a summary of the assessment methods used in the qualification.

Units	Assessment method
All units	Centre-devised assessment

Centre-devised assessment (internal assessment)

Each unit has specified learning outcomes and assessment criteria. To pass an internally assessed unit, learners must meet all the assessment criteria. Centres may find it helpful if learners index and reference their evidence to the relevant learning outcomes and assessment criteria.

Centres need to write assignment briefs for learners to show what evidence is required. Assignment briefs should indicate clearly which assessment criteria are being targeted.

Assignment briefs and evidence produced by learners must also meet any additional requirements in the *Information for tutors* section of the unit.

Unless otherwise indicated within *Information for tutors*, the centre can decide what form assessment evidence will take (for example performance observation, presentations, projects, tests, extended writing) as long as the methods chosen allow learners to produce valid, sufficient and reliable evidence of meeting the assessment criteria.

Centres are encouraged to give learners realistic scenarios and maximise the use of practical activities in delivery and assessment.

Opportunities to link the delivery and assessment of units with other units should also be encouraged to avoid over assessment.

Further guidance about internal assessment can be found on our website. . See *Section 12: Further information and useful publications* for further details.

6 Recognising prior learning and achievement

Recognition of Prior Learning

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Pearson encourages centres to recognise learners' previous achievements and experiences in and outside the workplace, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. If the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Further guidance is available in the policy document *Recognition of Prior Learning Policy*, available on our website.

7 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. The centre assesses BTEC qualifications. The centre will use quality assurance to make sure that their managers, internal verifiers and assessors are standardised and supported. Pearson use quality assurance to check that all centres are working to national standards. It gives us the opportunity to identify and provide support, if needed, to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Pearson quality assurance model will follow one of the processes listed below.

1 Delivery of the qualification as part of a BTEC apprenticeship (single click registration)

   - Two visits each year by a Standards Verifier to review centre-wide quality assurance systems and sampling of internal verification and assessor decisions, as dictated by the *Work-Based Learning BTEC Quality Assurance Handbook.*

2 Delivery of the qualification outside the apprenticeship

   - an annual visit to the centre by a Centre Quality Reviewer to review centre-wide quality assurance systems
   - Lead Internal Verifier accreditation. This involves online training and standardisation of Lead Internal Verifiers using our OSCA platform, accessed via Edexcel Online. Please note that not all qualifications will include Lead Internal Verifier accreditation. Where this is the case, we will annually allocate a Standards Verifier to conduct postal sampling of internal verification and assessor decisions for the Principal Subject Area.

For further details, go to the UK BTEC Quality Assurance Handbook on our website.

8 Programme delivery

Centres are free to offer the qualification using any mode of delivery (for example full time, part time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must make sure that learners have access to the resources identified in the specification and to the subject specialists delivering the units.

Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to make sure a course is relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- developing up-to-date and relevant teaching materials that make use of scenarios that are relevant to the sector
- giving learners the opportunity to apply their learning in practical activities
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- making full use of the variety of experience of work and life that learners bring to the programme.

9 Access and recruitment

Pearson's policy regarding access to our qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all those wishing to access the qualifications.

Centres are required to recruit learners to BTEC Specialist qualifications with integrity.

Applicants will need relevant information and advice about the qualification to make sure it meets their needs.

Centres should review the applicant's prior qualifications and/or experience, considering whether this profile shows that they have the potential to achieve the qualification.

For learners with disabilities and specific needs, this review will need to take account of the support available to the learner during teaching and assessment of the qualification. The review must take account of the information and guidance in Section 10.

10 Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Pearson's Equality Policy requires that all learners should have equal opportunity to access our qualifications and assessments and that our qualifications are awarded in a way that is fair to every learner.

We are committed to making sure that:

- learners with a protected characteristic (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 from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Details on how to make adjustments for learners with protected characteristics are in the policy document *Access arrangements reasonable adjustments and special considerations*, which is on our website.

11 Units

Unit format

Units have the following sections.

Unit title

This is the formal title of the unit that will appear on the learner's certificate.

Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

Level

All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors defined by Ofqual, the qualifications regulator.

Credit value

When a learner achieves a unit, they gain the specified number of credits.

Guided learning hours

Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

Unit aim

This gives a summary of what the unit aims to do.

Essential resources

This section lists any specialist resources that are needed to deliver the unit. The centre will be asked to make sure that these resources are in place when it seeks approval from Pearson to offer the qualification.

Learning outcomes

The learning outcomes of a unit set out what a learner knows, understands or is able to do as the result of a process of learning.

Assessment criteria

The assessment criteria specify the standard required by the learner to achieve the assessment criteria. Where brackets are used, they make clear the extent or range of a particular areas of content, while 'e.g.s' are used to give exemplification.

Unit amplification

This section gives further clarification on what a learner needs to know to achieve a learning outcome. Information in brackets gives exemplification for specific areas of knowledge.

Information for tutors

This section gives tutors information on delivery and assessment. It usually contains the following sub-sections.

- *Delivery* – explains the content's relationship to the learning outcomes and offers guidance on possible approaches to delivery.
- *Assessment* – gives information about the evidence that learners must produce, together with any additional guidance if appropriate. This section should be read in conjunction with the assessment criteria.
- *Indicative resource materials* – lists resource materials that can be used to support the teaching of the unit, for example books, journals and websites.

Unit 1: Principles of Marketing Theory

Unit reference number: D/502/9928

Level: 2

Credit value: 4

Guided learning hours: 30

Unit aim

This unit gives learners an overview of how marketing works and is an introduction to the other units in the qualification.

Learners will find out about how and why markets are segmented. They will also learn about the value of marketing, including the importance of branding. Finally, they will learn about the impact of socially responsible marketing.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand how to segment the market	1.1	Explain the importance of defining market segments	◻ To identify potential target customers ◻ To avoid waste of effort and resources in targeting customers unlikely to buy your products ◻ To assess segment viability and enable segment to be selected for targeting (size, sustainability, profitability, accessibility)
		1.2	Describe the difference between market segments and customer classifications	◻ 'Market segments' as a defined homogeneous groups of customers likely to respond in a similar and predictable way to marketing stimuli ◻ Classifications as a way of attributing particular attitudes/traits/behaviours to a customer type e.g. Acorn, 4 Cs, socio-economic classifications
		1.3	Explain how to cluster customers with similar characteristics	◻ Different bases of classification (socio-economic, demographic, geographic, psychographic, behavioural) ◻ Combination of classifications as a more complete approach ◻ Purpose of classifying customers (to identify a homogeneous group)

Learning outcomes		Assessment criteria		Unit amplification
		1.4	Describe how a range of products may appeal to different market segments	◻ How products are differentiated by image/design/price level/functionality ◻ How consumers make decisions based on their particular needs e.g. price, quality, status ◻ How to target different customers e.g. Finest versus Basic
		1.5	Describe the importance of valid and reliable marketing data to segmenting the market	◻ Definition of 'reliable' as data that is accurate, consistent and replicable ◻ Definition of 'valid' as whether the data measures what it is intended to measure ◻ Importance of validity and reliability in marketing data (to understand potential market, to assess appropriateness of design/advertisements/pricing, to avoid waste of resources)
		1.6	Explain the strengths and weaknesses of different marketing data collection methods	◻ Cost versus effectiveness of primary methods e.g. face-to-face interviews, questionnaires, telephone surveys, internet surveys, focus groups ◻ Definition of secondary data as data already collected within or outside the organisation ◻ Value of secondary data in providing background information and trend analysis ◻ Problems of relevance and reliability of sources of secondary data

Learning outcomes		Assessment criteria		Unit amplification
		1.7	Describe the use of Customer Relationship Management (CRM) activities and systems	◻ Definition of CRM as a concept ◻ Relationship marketing as a way of maintaining and building long-term relationships with customers ◻ CRM systems in practice e.g. loyalty cards as a way of encouraging repeat custom ◻ CRM systems as a way of gathering marketing information ◻ Using CRM systems to develop marketing strategies and encourage brand loyalty
2	Understand the value of marketing	2.1	Describe the role of marketing in enhancing the sale of products and/or services	◻ The 4Ps of the marketing mix (product, price, promotion, place) ◻ The 7Ps of the extended-service mix (product, price, promotion, place, people, processes, physical evidence) ◻ How the mix is integrated ◻ How to use factors other than pricing to persuade consumers to buy e.g. unique selling points, promotion of image ◻ How to meet customer needs and expectations through promotion/product development/distribution decisions ◻ How to use relationship marketing to encourage loyalty
		2.2	Explain the significance of customer loyalty to the achievement of marketing objectives	◻ Retaining customers is less expensive than trying to gain new ones ◻ Adding value e.g. through brand extension/new product development in response to demand

Learning outcomes		Assessment criteria		Unit amplification
		2.3	Explain the role of performance indicators and evaluation arrangements	◻ To allow performance to be measured against outcomes e.g. planned sales over a specific time period ◻ Part of planning cycle (plan, implement, review, amend) ◻ To identify when corrective measures might need to be taken
		2.4	Describe the factors to be taken into account when assessing the cost and value of marketing activities	◻ Cost of activities ◻ Timing of activities ◻ Scheduling of activities to support each other e.g. PR and advertising campaign to support new product launch ◻ Setting objectives to measure financial performance e.g. sales promotion campaign
		2.5	Explain the significance of brand and reputation to sales performance	◻ How strong brands can add value for the company ◻ How damaged reputations can seriously affect the value of brands
3	Understand the principles of socially responsible marketing	3.1	Explain the scope and purpose of socially responsible marketing	◻ Increasing importance of socially responsible marketing in terms of corporate image/corporate social responsibility (CSR) ◻ Categories within the concept of socially-responsible marketing e.g. fair trade, child exploitation, environmental concerns ◻ Role of social responsibility in meeting customer expectations ◻ Effect of being seen as socially responsible or irresponsible on brand image and subsequent financial performance

Learning outcomes	Assessment criteria		Unit amplification
	3.2	Explain the importance of involving stakeholders in socially responsible marketing activities	◻ Involving stakeholders as a response to increasing customer awareness of wider social issues ◻ Involvement through the distribution chain and suppliers' role in behaving in a socially responsible manner ◻ Consulting key interest groups in marketing decisions e.g. charities, environmental pressure groups ◻ Benefits of involving stakeholders e.g. enhancing corporate image
	3.3	Explain how core values are expressed through coherent branding and chosen communication methods	◻ Use of language e.g. slogans or product descriptions ◻ Use of visual images, colours and music to convey emotion and consistency of image/values ◻ Use of narrative e.g. food producers/retailers explaining how animals are reared or products grown
	3.4	Explain the requirements of socially responsible marketing campaigns	◻ Ensuring adherence to standards regarding particular social responsibilities ◻ Avoiding marketing campaigns that have negative impact e.g. on health, on the environment ◻ Monitoring of performance of the campaign against social responsibility objectives ◻ Using marketing communications to reinforce social responsibility

Information for tutors

Delivery

This unit provides the foundation for the other units in this level 2 qualification. The focus of the unit is on how marketing is used to target customers through differentiation using the marketing mix. Case studies would help learners to apply theory in context. A range of examples would be the most effective way of doing this, incorporating different types of business in terms of size, industry and sector. Another option would be for learners to come up with a new product and to show how they would research the market, target customers, develop the marketing mix and manage the process, including CRM, in a 'what if' scenario. Businesses could also be invited to speak to learners about their marketing.

Assessment

The centre will devise and mark the assessment for this unit. Learners must meet all assessment criteria to pass the unit.

For all assessment criteria, assessment evidence could be presented as a written report on a particular business or comparison of businesses.

Learning outcomes could also be covered by a written report covering some of the assessment criteria, supported by an oral or poster presentation covering the rest.

Learners could choose their own businesses to investigate or they could be given a specific scenario, depending on available resources and learners' needs/interests.

Learning outcome 1

Learners must show they understand the importance of segmentation and the consequences of failing to segment accurately. Assessment criteria 1.1, 1.2, 1.3 and 1.4 should preferably be assessed together. The idea of segmentation and targeting through differentiation is fundamental to success in marketing so this should be the focus of the assessment.

For 1.1, learners' explanations should include a comparison of how different specific organisations target differently.

For 1.2, 1.3 and 1.4, learners need to show that they understand that, in practice, classifications are a shorthand, or simplification, for trying to describe the target customer in a meaningful way, and that there are different ways of doing this. So a mixture of different ways approaches to classify customers is more likely to be used in practice. Learners must show some awareness not just about what the companies do but also why.

Because segmentation is based on information gathered from the market, to meet assessment criteria 1.5 and 1.6 learners should explain how companies can carry out market research to inform this process, highlighting the importance of ensuring that good quality, useful data is obtained. This could be done using information from particular businesses, although this may be difficult to obtain. However, these assessment criteria could also be covered using a practical exercise such as designing a survey for a fictitious business, which could be assessed separately.

For 1.7, learners could pick a specific business, ideally one that has been used for 1.1, 1.2 and 1.3 and 1.4, to describe how it uses information to manage relationships with customers. This may be done most easily using a business that uses a loyalty card system, but other examples could be used.

Learning outcome 2

Learning outcome 2 could be assessed using the same business as in learning outcome 1 to explore how marketing activities are carried out in practice and how theory is applied. Alternatively, learners could use a fictitious business as a project, and could cover the assessment criteria by devising a business idea and explaining how they would market their product.

Because the assessment criteria follow on from those in learning outcome 1, the assessment for learning outcome 2 should allow learners to demonstrate this development.

For 2.1 and 2.5, the range of marketing mix elements and the significance of branding/reputation should be related to the chosen real or fictitious business.

Assessment criterion 2.2 is a development of 1.7, and is an opportunity to explain why customer loyalty is so important to a particular organisation.

2.3 and 2.4 introduce the management of the process and the role of performance indicators in achieving objectives. A schedule of marketing activities (particularly product development, product launch and promotional campaigns) could be used to show how this process is managed in practice.

Learning outcome 3

It may be possible to use the same business as used in learning outcomes 1 and 2 or the learners' own business idea. If not, this learning outcome can be covered by investigating a specific business which is involved in socially responsible marketing. Examples could be a large organisation such as the Co-op or a Fair Trade brand, such as Clipper. All assessment criteria should preferably be covered in an integrated way to ensure coherence.

Learners could produce a written report on the business or a presentation.

Learners' explanations should show that they understand what socially responsible marketing means (3.1) and they must include reference to at least three key stakeholders and the desired impact of marketing activities on these stakeholders (3.2, 3.3 and 3.4).

Indicative resource materials

Textbooks

Dibb S and Simkin L – *Marketing Essentials* (Cengage Learning, 2008)
ISBN 9781408011508

Journals

International Journal of Marketing

Journal of Marketing

Websites

www.cim.co.uk	Chartered Institute of Marketing: organisation for professional marketers.
www.marketingteacher.com	Teaching resources on marketing.

Unit 2: Understanding Legal, Regulatory and Ethical Requirements in Sales or Marketing

Unit reference number:	**F/502/8206**
Level:	**2**
Credit value:	**2**
Guided learning hours:	**15**

Unit aim

This unit is about understanding an organisation’s procedures for dealing with legal, regulatory and ethical requirements relating to sales or marketing, and the legal, regulatory and ethical limits of the role.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand an organisation's procedures for dealing with legal, regulatory and ethical requirements relating to sales or marketing	1.1	Describe an organisation's procedures for raising legal, regulatory and ethical concerns	◻ Sources of information on organisational procedures e.g. staff handbook ◻ Relevant factors to bear in mind (who to raise concerns with, methods for raising concerns, whether procedures vary depending on nature and seriousness of concerns)
		1.2	Explain the scope of legal, regulatory and ethical requirements in sales or marketing	◻ Scope internally (in dealings with colleagues) ◻ Scope externally (in dealings with clients, customers, suppliers, others such as industry regulators)
		1.3	Explain how the legal, regulatory and ethical requirements relate to the business of selling or marketing	◻ Legal requirement to treat customers fairly ◻ Sales and marketing activities impacted on in relation to dealings with customers (terms within contracts, sales techniques, organisations' use of customer data, information provided by organisations about products and services when marketing them, information provided to customers during distance selling, unfair practices)
		1.4	Describe internal and external sources of information on legal, regulatory and ethical requirements	◻ Internal sources e.g. employee handbook, organisational policies and procedures, line manager, human resources ◻ External sources e.g. government bodies, industry regulators, industry codes of practice, trade associations, specialist companies

Learning outcomes		Assessment criteria		Unit amplification
		1.5	Explain how an ‘ethical approach’ affects organisations in the sales or marketing environment	◻ How being seen to be ethical can improve image and increase business ◻ Role of marketing in answering ethical questions in relation to a product or service e.g. who was involved in producing it, where it was produced, what resources were used, what environmental impact it has
		1.6	Explain the importance of contract law in sales	◻ Relevant features that must be present for a sales contract to exist (an offer, an acceptance, consideration) ◻ What can invalidate a sales contract (misrepresentation, duress used by salesperson, unfair contract terms, incapacity of person accepting a contract, mistakes in the contract, failure to carry out terms contained in the contract)
2	Understand the legal, regulatory and ethical limits of the sales or marketing role	2.1	Explain the legal, regulatory and ethical requirements relevant to the role	◻ E-Commerce Regulations and their impact on email marketing ◻ Consumer Protection From Unfair Trading Regulations and their impact on marketing ◻ Data protection legislation and its impact on how organisations hold data on customers ◻ The Equality Act and its impact on advertising (need to avoid unfavourable treatment of people based on a protected characteristic) ◻ Copyright legislation and its impact on the creation of marketing materials ◻ Impact of any codes of practice relevant to the sector e.g. pharmaceutical, telecommunications

Learning outcomes	Assessment criteria		Unit amplification
	2.2	Describe the potential consequences of not complying with legal, regulatory or ethical requirements	▫ For an individual (disciplinary action, legal action) ▫ For an organisation (legal action, damage to staff morale, damage to reputation, lost business)
	2.3	Explain the importance of working within the limits of the role, responsibilities and authority	▫ Positive reasons e.g. to ensure organisational procedures are complied with, to ensure decisions are taken by people appropriately qualified to make them ▫ To avoid negative repercussions of exceeding limits of authority e.g. negative consequences for organisation, effect on working relationships, possible disciplinary action
	2.4	Explain the process for reporting legal, regulatory and ethical concerns	▫ A typical reporting process e.g. (1) concern reported (2) issue investigated (3) action taken if appropriate
	2.5	Explain the importance of clarity of communication with the customer to ensure common understanding of agreements and expectations	▫ Centrality of clear communication in managing customer expectations ▫ Importance of avoiding misleading marketing (to comply with sales regulations, to avoid the risk of invalidating agreements) ▫ Importance of providing clear information to comply with relevant legislation e.g. Distance Selling Regulations

Information for tutors

Delivery

The delivery of this unit should be contextualised using real examples. It could focus on a single organisation or sector that is relevant to the needs and interests of learners, as long as it provides scope to cover the learning outcomes. It would be preferable, however, if delivery (in contrast to assessment) could use a range of examples drawn from different sectors.

There is considerable overlap between learning outcome 1 and learning outcome 2 and the most effective approach would be to treat them holistically. So, for example, it would be best to cover procedures for raising legal, regulatory and ethical concerns (1.1) together with the process for reporting legal, regulatory and ethical concerns (2.4). Similarly, it would make sense to deliver 1.2, 1.3, 1.6, 2.1, 2.2 and 2.5 together as they all relate to the scope and impact of legal, regulatory and ethical concerns.

Assessment

The centre will devise and mark the assessment for this unit. Learners must meet all assessment criteria to pass the unit.

As with delivery, it would make sense to look for ways of grouping assessment criteria together so that learners can deal with several assessment criteria simultaneously.

For each assessment criterion in learning outcomes 1 and 2, evidence should focus on a single organisation. If for some reason the organisation chosen does not provide sufficient scope for the learner to meet all the assessment criteria, then a different organisation could be used where required.

For both learning outcomes, evidence could be presented as a report or handbook, written to provide guidance to new staff on these matters. Other approaches could also be used, but where possible the number of pieces of assessment evidence should be kept to a minimum to ensure that learning and assessment is coherent.

The organisation chosen will dictate the extent and nature of some of the assessment evidence produced, for example in relation to the processes and procedures for reporting concerns (1.1 and 2.4). With assessment criteria 1.6 and 2.1, learners should make clear which of the *Unit Amplification* is relevant to the organisation. If a bullet point is thought not to be relevant (for example if there are no e-commerce activities), learners must cover it in some other way. For example, they could present a brief report on the implications for the organisation of moving into a different area of business.

Indicative resource materials

Website

www.businesslink.gov.uk	Information and advice on business, including legal issues.

Unit 3: Principles of Personal Responsibilities and Working in a Business Environment

Unit reference number: L/601/7638

Level: 2

Credit value: 4

Guided learning hours: 32

Unit aim

This unit gives learners an understanding of number of topics connected to working in a business environment. A major part of this unit is related to the law and concerns employment rights and responsibilities, and health and safety. Learners will also explore several topics that are critical in any workplace, including effective communication, performance management, and how to deal with problems.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Know the employment rights and responsibilities of the employee and employer	1.1	Identify the main points of contracts of employment	◻ Main points in statement of employment (employer's name, job title, when employment began, pay, working hours, holidays, sickness, notice period)
		1.2	Identify the main points of legislation affecting employers and employees	◻ The right to have a minimum statement of employment terms ◻ Prohibition of unfair treatment in workplace for people with 'protected characteristics' under the Equality Act 2010 ◻ Pay rights (minimum wage, sick pay, redundancy pay) ◻ The right to paid time off (holiday, maternity/paternity/adoption leave) ◻ The right to minimum notice periods ◻ The right not to have to work more than 48 hours a week, unless opting out ◻ Protection from unfair dismissal ◻ The right to request flexible working
		1.3	Identify where to find information on employment rights and responsibilities both internally and externally	◻ Internal e.g. organisation manual/handbook, HR, trade union representative ◻ External e.g. Business Link, Citizens Advice Bureau, DirectGov, trade unions

Learning outcomes		Assessment criteria		Unit amplification
		1.4	Describe how representative bodies can support the employee	▫ Role of trade unions and staff associations e.g. to protect interests of employees, to negotiate with management, to provide legal assistance ▫ Role of professional bodies e.g. to provide legal advice, access to information and training, support in career development
		1.5	Identify employer and employee responsibilities for equality and diversity in a business environment	▫ Employer responsibilities (to comply with equal opportunities legislation, to ensure staff follow anti-discrimination policies, to have grievance procedures available) ▫ Employee responsibilities (to comply with legislation and organisational policies, to report problems, to treat colleagues with respect)
		1.6	Explain the benefits of making sure equality and diversity procedures are followed in a business environment	▫ Increased employee satisfaction, leading to better performance ▫ Allowing the employer to attract and retain the best talent ▫ Allowing the employer to make use of its diverse workforce to understand customers and win new business ▫ Reducing risk of discrimination claims, costs and bad publicity
2	Understand the purpose of health, safety and security procedures in a business environment	2.1	Identify employer and employee responsibilities for health, safety and security in a business environment	▫ Employer responsibilities (to make the workplace safe, to minimise health risks, to provide employees with relevant training and equipment, to have in place health/safety/emergency facilities and procedures) ▫ Employee responsibilities (to take care of own and others' health and safety, to follow employer's health and safety procedures, to report accidents and hazards)

Learning outcomes		Assessment criteria		Unit amplification
		2.2	Explain the purpose of following health, safety and security procedures in a business environment	◻ To comply with legislation ◻ To maintain welfare of self, colleagues and customers ◻ To avoid possible repercussions for business of failing to comply e.g. prosecution, litigation, disruption and lost productivity, security breaches
		2.3	Identify ways of maintaining a safe and secure environment in a business environment	◻ By following organisational safety policies and procedures ◻ By using equipment in line with manufacturers' instructions ◻ By being alert to and reporting potential safety hazards and security breaches ◻ Measures to keep information secure e.g. data and document storage procedures, use of passwords, access control procedures for visitors
3	Understand how to communicate effectively with others	3.1	Describe different methods of communication	◻ Written communication e.g. letters, emails, text messages, posters ◻ Spoken communication e.g. telephone, face to face ◻ Visual communication e.g. typography, images, colour ◻ Non-verbal communication e.g. gesture, eye contact, facial expression, paralanguage
		3.2	Explain how to choose the most appropriate method of communicating with others	◻ Choosing a method to suit message content (purpose, formality, established conventions, one-way versus two-way communication) ◻ Convenience/preferences of message sender and recipient ◻ Considering any requirements for speed or permanent record

Learning outcomes		Assessment criteria		Unit amplification
		3.3	Describe ways of actively listening	▫ Listening carefully to the message ▫ Paying attention to body language and non-verbal cues ▫ Paraphrasing and clarifying where necessary ▫ Not interrupting
4	Understand how to work with and support colleagues	4.1	Explain the purpose of agreeing standards for own work with others	▫ To clarify instructions, expectations and responsibilities ▫ To ensure work is carried out to appropriate standards ▫ To allow targets to be set and performance measured
		4.2	Explain the purpose of taking on new challenges and adapting to change	▫ To respond to changing needs of the organisation ▫ To develop own knowledge/skills and keep motivation high ▫ To increase chances of job retention and career development
		4.3	Explain the purpose of treating others with honesty and consideration	▫ To make for a more harmonious working environment ▫ To make teamworking more efficient ▫ To encourage openness e.g. willingness to ask for help or admit mistakes
5	Know how to plan own work and be accountable to others	5.1	Explain the purpose of meeting work standards and deadlines when completing tasks	▫ For the organisation e.g. to meet requirements of organisation and customers, to enhance reputation of organisation ▫ For self e.g. to meet targets, to build confidence with colleagues
		5.2	Identify ways of planning own work	▫ Approaches to task prioritisation e.g. urgency versus importance ▫ Basic task planning systems e.g. calendars, to-do lists ▫ Project planning tools e.g. flow charts, Gantt charts

Learning outcomes		Assessment criteria		Unit amplification
		5.3	Compare ways of keeping other people informed about progress	◻ Pros and cons of different methods e.g. meetings, emails, reports
6	Understand the purpose of improving own performance in a business environment and how to do so	6.1	Explain the purpose of continuously improving own performance in a business environment	◻ To meet needs of the organisation ◻ To develop own knowledge/skills and maintain personal satisfaction ◻ To increase chances of job retention and career development
		6.2	Describe ways of improving own performance in a business environment	◻ Performance management (SMART objectives, appraisals, development plans) ◻ Formal and informal training at or outside workplace ◻ Learning from colleagues e.g. informal learning from line manager/colleagues, coaching and mentoring, work shadowing
		6.3	Identify different types of career pathways that are available	◻ Typical career pathways in marketing e.g. market research, advertising, e-marketing, brand management, direct marketing, public relations

Learning outcomes		Assessment criteria		Unit amplification
7	Understand the types of problems that may occur in a business environment and how to deal with them	7.1	Identify the types of problems that may occur in a business environment	◻ Problems with tasks e.g. insufficient time/resources, lack of necessary skills, excessive workload, technology problems ◻ Problems with working environment e.g. distractions, noise ◻ Problems with people e.g. differing communication styles, personality clashes
		7.2	Explain ways of dealing with problems that may occur in a business environment	◻ Problems with tasks e.g. talking to line manager, re-prioritisation of tasks, re-negotiation of deadlines, training ◻ Problems with working environment or people e.g. learning to deal with noise and distractions ◻ Problems with people e.g. seeking help from line manager or human resources when required, following organisational procedures
		7.3	Explain how and when to refer problems to relevant colleagues	◻ Recognising when problem has a sufficiently negative impact on self or work that it should be referred ◻ Recognising which colleagues can help with which problems ◻ Knowing which problems should be reported and organisational reporting procedures

Information for tutors

Delivery

There are opportunities to link the delivery of this unit to other units in this qualification. For example, learning outcome 3 (which covers the theory of communication) could be taught alongside learning outcomes in units that deal with practical communication in a marketing context, such as learning outcome 5 in *Unit 4: Principles of Digital Marketing.*

In learning outcomes 1 and 2, learners do not need to be taught about the names and dates of key legislation, only how the legislation affects them. It would be beneficial for learners to see real examples of contracts, handbooks and policies if available.

In learning outcome 3, learners would benefit from having the opportunity to assess the effectiveness of different forms of communication using the criteria they have been taught, and also to put into practice the active listening techniques.

There are also opportunities to link the delivery of learning outcomes 4, 5 and 6 so as to take advantage of the overlap in content between them. There are opportunities for learners to apply their knowledge, for example through practical planning and prioritisation activities (assessment criterion 5.2) and in applying the principles of performance management (assessment criterion 6.2).

Assessment

The centre will devise and mark the assessment for this unit. Learners must meet all assessment criteria to pass the unit.

For all assessment criteria, evidence could be in writing. Alternatively, evidence could be collected orally in response to questions, with the assessor noting down learners' answers. It may be possible to assess the unit through professional discussion, with a signed witness statement. Evidence could be based on scenarios such as staff induction or staff training. If this method is used, then the assessor should ensure that the signed statement includes sufficient detail to support the assessment decisions for all the criteria assessed in this way.

Learning outcome 1

For learning outcome 1, learners should not just simply list different legislation, procedures and representative bodies, but should relate them to a specific organisation to put them in context.

To meet 1.1 and 1.2, learners must identify four main points in a contract of employment and the legislation respectively.

To meet 1.3, learners must identify at least two internal and two external sources of information.

For 1.4, learners must describe how at least one representative body can help the employee.

To meet 1.5, learners must give at least two employer responsibilities and two employee responsibilities in relation to equality and diversity.

For 1.6, learners must relate the benefits to an organisation, using information provided by the tutor or that they have researched themselves.

Learning outcome 2

It is recommended that the assessment criteria for learning outcome 2 are integrated, with learners relating their evidence to a specific organisation and job role that they have researched.

To meet 2.1, learners should not reproduce large chunks of health, safety and security information verbatim from company handbooks, but they must identify at least two employer responsibilities and two employee responsibilities.

For 2.2, learners must explain the purpose of following at least one health and safety procedure and at least one security procedure (as identified in assessment criterion 2.3). This must include reference to the possible repercussions of not following the procedures.

To meet 2.3 learners must identify three ways an employee can help maintain a safe and secure environment.

Learning outcome 3

Assessment of 3.1 and 3.2 should preferably be integrated. Learners must describe one spoken and one written method of communication, explaining when each would be appropriate. Some context for the communication should be provided by the tutor.

The best way of assessing 3.3 would be for learners to assess someone else's active listening skills (for example a recorded interview), describing how they did or did not demonstrate the relevant skills. This need not be in a business context.

Learning outcomes 4, 5, 6 and 7

When assessing learning outcomes 4, 5, 6 and 7, tutors should look for ways of assessing criteria holistically. Particular opportunities for this exist with the following groups of assessment criteria: 4.1, 5.1, 5.2 and 5.3; 4.2, 6.1 and 6.2; 4.3, 7.1, 7.2 and 7.3. Learners could draw on their own experiences or they could interview people working in suitable roles. In all cases, they should contextualise their assignment to relate to particular job roles and organisations. In all cases, learners are not restricted to the information supplied in the *Unit Amplification*.

To meet 4.1, 4.2 and 4.3, learners must explain at least one purpose for each assessment criterion.

To meet 5.1, learners must explain one purpose each from the employee and organisational perspective. For 5.2, learners must identify at least two methods for planning work. For 5.3, learners must compare different ways of keeping others informed of progress, comparing the benefits and limitations of at least two different ways. These should be related to a particular scenario.

To meet 6.1, learners must explain at least one purpose of continuously improving one's own performance at work. For 6.2, learners must describe at least three ways of improving performance. For 6.3, learners must identify at least three broad career pathways in marketing, preferably those that interest them most.

To meet 7.1 and 7.2, learners must deal with at least one problem in each of the three categories. To meet 7.3, learners could either show how they would deal with a particular problem or demonstrate that they understand the underlying principles involved in deciding how to deal with any workplace problem.

Unit 4: Principles of Digital Marketing

Unit reference number: D/502/9931

Level: 2

Credit value: 5

Guided learning hours: 40

Unit aim

This unit gives learners an overview of digital marketing. Learners will find out about the role of digital marketing, search engine optimisation and how digital marketing devices and technology are used.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the role of digital marketing	1.1	Explain the role of digital marketing within the overall marketing strategy	◻ Commonly used digital marketing devices (company websites and online advertising, email marketing, social media, mobile phone marketing) ◻ Role of digital marketing to either lead a marketing strategy (primary use of digital marketing) or support a marketing strategy (supplementary use of digital marketing)
		1.2	Explain the strengths and weaknesses of digital marketing	◻ Strengths compared with traditional non-digital marketing methods e.g. immediacy, may provide better opportunities for interaction, responses can be measured easily, perceived to be more modern, better for reaching a younger demographic, can be cheaper, can have greater reach ◻ Weaknesses compared with traditional non-digital marketing methods e.g. may not reach target audience, may not be appropriate for the business or product, possible technology costs
		1.3	Explain the importance of targeted digital marketing	◻ Effects on customers if targeted correctly (to drive traffic to product or website, to make sales) ◻ Effects on recipients if targeted wrongly (cost, negative responses, opportunities created for competitors) ◻ Importance of using the right media to reach target market

Learning outcomes		Assessment criteria		Unit amplification
		1.4	Describe the sources of data lists for use in targeting customers and potential customers	◻ How to develop lists from own resources e.g. based on customer records/enquiries, responses to promotions, primary market research ◻ Use of permission marketing in the development of customer lists ◻ Sources of bought-in lists from e.g. marketing organisations with similar customer profile, market research organisations, list brokers
		1.5	Explain the legal requirements and implications of digital marketing	◻ Current legislation relating to privacy, consumer protection, content of digital marketing material, diversity, copyright ◻ How to keep digital marketing activity within the constraints of legislation (having an awareness of constraints, checking material before it goes live, monitoring during campaign, ensuring secure systems for managing customer data)
		1.6	Describe the importance of digital data capture systems for digital marketing	◻ Use of web analytics to assess how a website is performing e.g. to measure traffic, to analyse customer navigation, to measure conversion rates, to track customer web use over time
2	Understand the use of search engine optimisation (SEO)	2.1	Describe the use of SEO	◻ The use of organic SEO e.g. use of keywords, cross-linking, regular updates ◻ The use of pay per click SEO
		2.2	Explain the importance of SEO	◻ Importance e.g. to improve visibility, to increase web traffic, for competitive advantage

Learning outcomes		Assessment criteria		Unit amplification
		2.3	Explain the advantages and disadvantages of links to other websites	◻ Advantages of having links to other websites e.g. customers can find it useful, builds relationships with other websites, can lead to reciprocal links and thereby improve search engine rankings ◻ Disadvantages of having links to other websites e.g. takes traffic away from your website, resource implications of needing to vet websites for inappropriate content and keep links updated
3	Understand the requirements of marketing research using the internet	3.1	Explain how to use search-related internet facilities to enable the identification and retrieval of targeted information	◻ How to use search engines effectively e.g. use of multiple-word searches/quotation marks/minus sign, how to restrict searches to a particular website or domain
		3.2	Explain the advantages and disadvantages of different internet data collection sources	◻ Public bodies e.g. government departments, Office of National Statistics ◻ Private and non-governmental organisations e.g. market research organisations, trade associations ◻ Possible advantages and disadvantages of different internet sources e.g. ease of access, cost, accuracy, independence, currency
		3.3	Explain the importance of confirming the accuracy of information retrieved from the internet	◻ To ensure information is current, valid and reliable ◻ Repercussions of not ensuring information is accurate e.g. marketing decisions might be based on false assumptions

Learning outcomes		Assessment criteria		Unit amplification
4	Understand the uses of digital marketing devices and messages	4.1	Describe the potential uses of a Customer Relationship Management (CRM) system	◻ Relationship marketing as a way of maintaining and building long-term relationships with customers ◻ CRM systems in practice e.g. loyalty cards as a way of encouraging repeat custom ◻ CRM systems as a way of gathering marketing information ◻ Using CRM systems to develop marketing strategies and encourage brand loyalty
		4.2	Explain the importance of data cleansing	◻ To ensure customer data is useable e.g. by rectifying inputting errors, by removing inaccurate information, by keeping customer contact details up to date ◻ To comply with data protection legislation
		4.3	Describe the use of digital marketing devices	◻ Use of company websites e.g. to provide information about the business, to communicate with customers, to promote products, to sell directly to customers ◻ Use of email systems for communicating with customers and promoting the business e.g. email newsletters, e-casts ◻ Use of mobile phones e.g. to provide information, to publicise offers, to allow customers to enter promotions instantly ◻ Use of social media e.g. to generate brand loyalty, to produce repeat business, to launch new products

Learning outcomes		Assessment criteria		Unit amplification
		4.4	Describe the use of digital response systems	▫ Use of embedded links in emails e.g. to activate email subscriptions, to direct customers towards websites ▫ Use of website registration systems e.g. to access restricted information, to access promotions, to register for email updates, to enter competitions ▫ Use of SMS short codes e.g. to respond to an offer, to request more information, to request a call back ▫ Use of quick response (QR) codes e.g. to link customers' mobile phones direct to company website, to give customers direct access to additional information
		4.5	Explain the advantages and disadvantages of different tracking systems	▫ Advantages of using cookies e.g. are sent automatically, improve customer experience by remembering preferences ▫ Disadvantages of using cookies e.g. some users have privacy concerns, if blocked then website functionality may be reduced, can be used for security attacks ▫ Advantages of a website log-in system e.g. works even if cookies disabled, useful for storing personal data securely ▫ Disadvantages of a website log-in system e.g. requires effort from customers and so might be off putting

Learning outcomes		Assessment criteria		Unit amplification
5	Understand how to use digital technology for marketing purposes	5.1	Explain how to use a CRM system	◻ How CRM is used in practice e.g. to capture information, to store information centrally in an easily accessible way, to analyse data, to allow the organisation to identify and contact particular groups of customers
		5.2	Explain how to maintain the currency and accuracy of digital databases	◻ Use of active methods e.g. email requests and reminders to check and update data, contacting database by phone for verbal confirmation of data, using official sources such as census or electoral register ◻ Use of passive methods e.g. encouraging customers to check and confirm that data held about them is correct, use of self-completion questionnaires, use of promotions which require completion of contact details to activate
		5.3	Explain the advantages and disadvantages of different digital technologies	◻ Different digital technologies e.g. websites, social media, email, mobile phones ◻ Advantages and disadvantages of different digital technologies e.g. flexibility, how effectively different technologies can access actual/potential customers, opportunity for customers to respond to messages on the different digital technologies, cost of developing digital messages for different digital technologies
		5.4	Describe the importance of tailoring messages to different digital media	◻ Why messages need to be tailored to different digital media e.g. screen size and display properties, how user interacts with the digital media, how users can respond to message once received ◻ Advantages of developing messages that are interoperable

Learning outcomes		Assessment criteria		Unit amplification
		5.5	Explain the potential for marketing to social networking sites	□ Main features of social networking sites e.g. Facebook, LinkedIn, Twitter, YouTube □ Use of social networking sites for marketing e.g. customer engagement, targeting early adopters, viral marketing, growing customer base, creating interest around your brand/product/business
		5.6	Explain how to prevent marketing messages being identified as 'spam'	□ How different tactics are used e.g. confirming permission is given by recipient, reminding recipient to add business to list of 'safe' contacts so that message is not rejected by contact's computer security system □ Steps that can be taken during development and production of marketing message e.g. avoiding obvious trigger words in email subject line, keeping content friendly and conversational, not attaching executable files, trialling message before mass usage

Information for tutors

Delivery

Most learners will have already had access to computers, mobile phones and the internet, and so they will also have been on the receiving end of a range of digital marketing. Tutors can make use of this experience when delivering the unit.

The learning outcomes for this unit are all based on understanding, which means that purely theory-based delivery could be used, but it will be more interesting for learners and result in better understanding if there are practical activities and access to digital marketing in action. This is particularly relevant for learning outcome 2, concerning the use of search engine optimisation (SEO) and learning outcome 5, the use digital technology for marketing purposes. It will add value to their experience if learners can visit organisations which are actively engaged in the use of digital technology for their marketing. Centres could also try and arrange for visiting speakers from relevant organisations. This will give learners an opportunity to ask questions about the use of digital technology in a marketing context, about the advantages and disadvantages of SEO and so on.

Assessment

The centre will devise and mark the assessment for this unit. Learners must meet all assessment criteria to pass the unit.

For all the assessment criteria, evidence could be done in writing as reports or case studies which show how organisations use digital technology for marketing purposes. This could be achieved by focusing on a single organisation, or by collecting information from different organisations. It is also possible to cover the assessment criteria using more than one assessment approach, for example a written report together with an oral presentation, a poster presentation or by using appropriate digital media. Learners could choose their own businesses to investigate or they could be given a specific scenario or case histories.

Where explanations are required, learners should support them with evidence. Descriptions should also be in the context of application rather than purely theoretical. Suggestions for approaches to assessment are given below. These are not prescriptive and other approaches could be used.

Learning outcome 1

This learning outcome may appear to be larger than others in this unit, but it provides overarching knowledge which the learner can draw on in the other learning outcomes.

Assessment criterion 1.1 will need a context, based on the marketing strategy for either a real business or a case study. The context used for 1.1 should preferably be chosen so that it will also provide sufficient research and study opportunities for 1.2, 1.3, 1.4 and 1.6, allowing learners to say something about each of the bulleted points in the *Unit Amplification*. 1.2 should include both strengths and weaknesses and not just be one sided.

The explanation for 1.5 could be based on the context used for other assessment criteria, or set against the digital business environment as a whole. Learners do not need to know the detail of every aspect of legislation which protects and constrains digital marketing. However, they need an awareness of how to manage digital marketing activity within legal constraints, and the consequences of ignoring current legislation.

The business or case study used in learning outcome 1 could also be used as the basis for meeting the criteria in learning outcomes 4 and 5.

Learning outcome 2

One way of meeting assessment criteria 2.1 and 2.2 would be for learners to present a case for the use of SEO, and its importance in the current and future business world, to a senior member of the business management who has low awareness or is sceptical of the need for SEO. Explaining the advantages and disadvantages for a business of having links with other websites (assessment criterion 2.3) could also be achieved through an explanation to someone who has a low awareness of this issue.

Learning outcome 3

One approach to meeting the assessment criteria in this learning outcome would be for learners to put together a proposal for using the internet to answer the needs of a market research project. Ideas for the research project could include producing market research data to support given marketing activity, to identify new markets, to quantify markets, or to establish the strength (or not) of a business or product within a given market.

The basic outline of the proposal would meet assessment criterion 3.1, and the proposal could be supported by advantages and disadvantages of using an internet-based approach (3.2), with a final explanation of how the accuracy of the information retrieved could be confirmed (3.3).

Learning outcomes 4 and 5

The business or case study used in learning outcome 1 could also be used as the basis for meeting the assessment criteria in learning outcomes 4 and 5.

Using the bullet points in the *Unit Amplification* as a checklist, a detailed report or case study could be put together, based on learners' research and investigations into digital marketing in a business or organisation.

Alternatively, 4.2, 4.5, 5.3, 5.4, 5.5 and 5.6 could be presented as a report to someone who has a low awareness of digital marketing but wants to find out more about the subject and start to use digital marketing to promote and develop their business or products. Again, the bullet points in the *Unit Amplification* could be used as a checklist to form the basis of this report. Learners need to be familiar with the current use of digital marketing devices and messages and how they fit with the overall marketing strategy of different organisations. Learners should be encouraged to seek out and investigate a range of different digital marketing devices, so that they can begin to understand the way each is used, its strengths and weaknesses and how it influences marketing messages.

Indicative resource materials

Websites

www.businesslink.gov.uk	Information and advice on business, including digital marketing

Unit 5: Principles of Market Research

Unit reference number: K/502/9933

Level: 3

Credit value: 5

Guided learning hours: 40

Unit aim

This unit gives learners an overview of why and how to carry out market research. This includes how to decide if market research is needed and how to choose appropriate research methods, objectives and evaluation criteria. The unit also covers the principles of data collection and how to interpret and evaluate the data collected.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the basis on which market research is commissioned	1.1	Describe how to identify the need for market research and the sources of evidence to support this	◻ When research may be needed e.g. to identify target markets, to identify needs and wants of target customers, to test ideas, to understand competitors better, to understand market size/structure/trends ◻ Sources of evidence that confirm research is needed e.g. sales figures, competitor activity, observed changes in nature of the market
		1.2	Describe the basis for scoping the research and identifying linkages, interdependencies and the possible impact of one element on others	◻ Link with marketing objectives (scope of research depends on the marketing objectives set) ◻ Research may be carried out on any element from the marketing mix e.g. the impact of product development on pricing opportunities ◻ Marketing research as a continuous activity which allows the market and the marketing environment to be scanned
		1.3	Explain how to set research parameters, aims and evaluation criteria	◻ Based on specific and limited aims to enable effective processing/analysis/evaluation in terms of timescales, size of sample, and usefulness to the decision-making process
		1.4	Explain the importance of involving stakeholders in the definition of research to be carried out	◻ Which internal stakeholders can be involved e.g. sales department, customer services, R&D, finance ◻ Benefits of stakeholder involvement (to help to define the purpose, to influence research methodology used, to bring different and valuable perspectives to research design)

Learning outcomes		Assessment criteria		Unit amplification
		1.5	Explain how to evaluate different options for conducting the research	▫ What information is needed and what it will be used for ▫ What the best mix of methods is within constraints (validity and reliability, time/human/financial resources available) ▫ If the choice of sample appropriate e.g. representativeness, size ▫ Costs versus benefits
2	Understand how to design market research projects	2.1	Explain how to set research objectives, timescales, budget and resource requirements and success criteria	▫ How to set objectives (SMART objectives, objectives linked to purpose and desired outcomes, stakeholder requirements) ▫ How to set timescales (how to divide and allocate time to different stages of the research, importance of building in contingency time, importance of liaison with internal stakeholders to identify when results are needed) ▫ What resources are needed e.g. financial, staff, outside agencies ▫ How to set success criteria in terms of research objectives e.g. quantity and quality of data collected, clarity of conclusions drawn
		2.2	Explain how to specify the characteristics and size of the sample to be researched in accordance with the research aims and objectives	▫ Importance of defining the target population ▫ Characteristics based on relevant factors e.g. socio-economic/demographic/psychographic classifications, buyer behaviours/attitudes/opinions ▫ What sample size will yield best information to be sufficiently accurate

Learning outcomes		Assessment criteria		Unit amplification
		2.3	Describe the factors to be taken into account when selecting research instruments that are fit for purpose	◻ Nature of enquiry (exploratory versus descriptive) ◻ Marketing/business objectives that will be informed by the research ◻ Financial factors (efficiency and effectiveness of research design, budget constraints)
		2.4	Explain how to ensure the suitability of methods chosen to conduct research	◻ Piloting of research instruments ◻ Testing for lack of bias
		2.5	Explain the strengths and limitations of quantitative and qualitative research	◻ Quantitative research strengths (gives data on what happens and factual data, tends to be reliable, can be very cost effective and so allows lots of data to be collected quite cheaply, can be easier to process) ◻ Quantitative research limitations (does not readily yield behavioural factors, often excludes real-life factors and so tends to be less valid) ◻ Qualitative research strengths (can give 'richer' data than quantitative research that reflects reality better, suited to capturing information about opinions) ◻ Qualitative research limitations (tends to be less reliable, tends to cost more to gather using more expensive/labour-intensive methods, is more difficult to process as judgement needs to be used to analyse findings)
		2.6	Explain how risks inherent in market research may be addressed	◻ Use of project-planning tools to ensure research meets objectives, budgets and timescales ◻ Use of specialist market research agencies

Learning outcomes		Assessment criteria		Unit amplification
		2.7	Explain how to ensure that research data collected is valid and reliable	◻ Sampling methods e.g. simple random, stratified random, cluster, systematic ◻ How to design survey questions to eliminate bias ◻ Benefits of triangulation (to provide a balanced approach that should give a better overall picture, to allow for unusual/unexpected outcomes to be picked up)
		2.8	Describe the uses of the research outputs	◻ Decisions regarding the market e.g. size, growth, segmentation ◻ Performance measurement e.g. new product development, new market development, advertising campaigns ◻ Strategy planning e.g. overseas market entry, retaliation to competitor activity, response to stakeholder concerns
		2.9	Explain how to obtain approval to the proposed research	◻ How to put a proposal together e.g. objectives, resources, benefits ◻ Importance of discussing with key stakeholders e.g. senior management, finance, marketing staff
3	Understand the principles of marketing data collection	3.1	Explain the difference between primary and secondary research and how this affects data collection methods and interpretation	◻ Primary/field research requires data collection (data collection focused on correct selection of representative sample, clear objectives focused on planned marketing outcomes) ◻ Secondary/desk research uses data already collected (provides background and/or longitudinal/cross-sectional information, not specifically focused on own research objectives)

Learning outcomes		Assessment criteria		Unit amplification
		3.2	Describe the importance of using research instruments correctly	◻ To avoid mistakes e.g. bias and inaccuracies ◻ To ensure continuous research can be carried out to produce accurate trend/comparison data
		3.3	Explain the role of data collection in a market research project	◻ To provide direct information that can be analysed
		3.4	Explain how to address problems arising in data collection (e.g. insufficiency of representative sample, unreliable or invalid data)	◻ Use of different methods to test elements of research such as distribution or valid correlation ◻ Additional research if problems are found e.g. increase sample size, revisions to research instruments
		3.5	Explain the importance of accurate data recording	◻ Types of problems that can occur with data collection and recording e.g. failure to transcribe interviews correctly, corrupted data sets ◻ Repercussions of failure to ensure accurate data collection e.g. organisation might base key strategic decisions on invalid results
		3.6	Explain marketing data storage, security and access requirements	◻ Electronic storage and the use of secure systems ◻ Data protection legislation considerations in relation to personal data and sensitive personal data

Learning outcomes		Assessment criteria		Unit amplification
4	Understand the principles of marketing data interpretation and evaluation	4.1	Explain the volume of data needed to ensure statistical confidence	□ Concept of ‘confidence level’ as a measure of how representative data is □ Concept of ‘confidence interval’ as margin of error in responses □ Impact of sample size on confidence intervals (increase in sample size results in decreased confidence interval) □ Impact of sample size on confidence level (increase in sample size results in higher confidence level)
		4.2	Explain how to evaluate the quality, reliability and validity of market research data	□ Screening of data for invalid responses □ Correlations of similar questions to check consistency □ Checking for contradictory responses □ Checking for unusual/outlier responses
		4.3	Describe the use(s) of market research	□ What market research can be used to measure (behaviour, characteristics, possessions, attitudes/opinions) □ Main types of data that can be generated (nominal, ordinal, interval)
		4.4	Explain the application, strengths and weaknesses of different data analysis methods	□ Importance of using a method appropriate for type of data □ Strengths and weaknesses of measures of central tendency and dispersal (mean, mode, median, range, standard deviation) □ Use of tables/graphs to present data □ How to analyse qualitative data by categorising and frequency counts

Learning outcomes		Assessment criteria		Unit amplification
		4.5	Explain the use of statistical tools to identify trends, causes and correlations in marketing data	◻ Difference between positive and negative correlations ◻ Use of correlation to establish strength of relationship between two variables e.g. through data-mining ◻ How experimental data can be collected to establish causation e.g. measuring impact of different prices on sales volume ◻ Why statistical tools are used to check for statistically significant causal relationships ◻ Why it is useful to calculate trends from time series data (to show direction clearly by eliminating fluctuations, to allow forecasting into the future)
		4.8	Explain the strengths and weaknesses of different data evaluation methods	◻ Strengths of data evaluation methods e.g. can provide information about relationships between different variables, some methods can generate clear visual representations ◻ Weaknesses of data evaluation methods e.g. type and distribution of data may not be suitable for a given data evaluation method, some data evaluation methods may not be suitable for small data sets
		4.9	Explain the basis on which to reach conclusions as to the usefulness of the research	◻ Whether data provided sufficient information to meet the research objectives ◻ Whether research aided marketing decisions as planned

Information for tutors

Delivery

This unit should be delivered after *Unit 1: Principles of Marketing Theory.*

Although this unit is about the theory rather than the practice of market research, providing learners with an opportunity to carry out a small scale research project would help them to better understand the theory. This is particularly important in, for example, research design where the pitfalls of choosing inappropriate or badly-designed research instruments can seriously affect outcomes.

For 4.1, learners are not required to know *how* to calculate the volume of data needed to ensure statistical significance as formulas can be used to do this, but they do need to be taught about the key concepts of confidence levels, confidence intervals and sample size effects. Similarly, 4.4 and 4.5 require learners to know *about* the tools/methods rather than being able to use them.

When delivering 4.6, tutors should choose at least two different data evaluation methods (for example cluster analysis, factor analysis) that are relevant to the needs of their learners. The actual advantages and disadvantages taught will depend on the techniques.

Assessment

The centre will devise and mark the assessment for this unit. Learners must meet all assessment criteria to pass the unit.

An appropriate assessment approach would be for learners to design a market research project based on a real or imaginary company. The need to cover theory-based criteria will also require some written explanation of how the process was undertaken and some management issues (such as obtaining agreement).

Learning outcome 1

This learning outcome is concerned with establishing the need for market research and what the scope and limits will be.

Assessment criteria 1.1, 1.2, 1.3 and 1.4 could be based on a real situation or a scenario. Precisely what the scope is (1.2) and what links and interdependencies there are depends on the particular research project planned. The choice of situation/example needs to allow learners to say something about each of the bullet points in the *Unit Amplification* for 1.1-1.4.

1.5 deals with choice of options for carrying out the research so all aspects of this criterion must be covered.

Learning outcome 2

This follows from learning outcome 1 and would be best approached through designing a market research project. This could be based on the one explored for learning outcome 1.

Assessment criteria 2.1, 2.2, 2.3, 2.8 and 2.9 need to cover what is to be researched, why it is to be researched, how it fits into overall corporate strategy, how objectives and how parameters are set, and how the research would be resourced. Specific aspects (such as objectives, resources, populations, stakeholders) will determine the extent of coverage of the *Unit Amplification* for these assessment criteria.

At this point assessment criterion 4.3 could also be covered to show how the findings will be used and also 4.7 in terms of how the results are intended to be used to make marketing decisions.

Assessment criteria 2.4, 2.5, 2.6 and 2.7 deal with the implementation of market research and how to ensure accurate, reliable and valid results are obtained so as to make sound marketing decisions. This section would preferably include the research proposal and an explanation of how risks and potential problems of undertaking research would be minimised or mitigated against.

For 2.4, 2.5 and 2.6, measures to ensure that the research mix is appropriate must be explained. For 2.5, this needs to include an explanation of the role of qualitative and quantitative research and factors which must be taken into account (at least three in each case). It is important that 2.4 is fully covered, especially the need to pilot surveys and how to avoid bias in the results.

Learning outcomes 3 and 4

Within a research proposal, justification of the choice of methods and methodology could be used to show how research theory underpins practice in order to cover the assessment criteria in learning outcome 3.

Assessment of learning outcome 4 can be linked to the research proposal. So for example, learners can explain the volume of data that will need to be collected (4.1), how the quality, reliability and validity of the data will be evaluated (4.2), which (of at least two in each case) analysis/tools/evaluation methods will be used and why (4.4, 4.5 and 4.6). The nature of the data will determine the coverage of the *Unit Amplification* for these assessment criteria.

Indicative resource materials

Textbooks

Proctor T – *Essentials of Marketing Research* (Financial Times/Prentice Hall, 2000) ISBN 0273642006

Unit 6: Principles of Customer Relationships

Unit reference number:	**K/503/8194**
Level:	**2**
Credit value:	**3**
Guided learning hours:	**18**

Unit aim

This unit teaches learners about customer relationships. The first part of the unit is about how to understand customers, their needs and wants. The remainder of the unit focuses on how organisations act on this understanding to manage relationships with customers.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand customers and their needs	1.1	Describe the importance of understanding customers' wants and needs	◻ The difference between needs and wants ◻ Consequences of failing to meet needs and wants e.g. falling sales, brand switching, damage to image
		1.2	Explain the role of segmentation in identifying customers' likely wants and needs	◻ What segmentation is ◻ How needs-based segmentation can be used to identify needs and wants
		1.3	Describe the factors that motivate customers to buy	◻ Stages of purchase behaviour (problem/need recognition, information search, evaluation of options, purchase decision) ◻ Practical factors that influence decision e.g. price, features, reliability ◻ Emotional factors that influence decision e.g. status, peer pressure ◻ Relevance of Maslow's hierarchy of needs
		1.4	Explain the importance of seeking customer feedback on performance, products and/or services	◻ To help identify problems/issues to resolve to meet customer needs ◻ To show customers that their opinions are valued ◻ To compare organisational performance in relation to competitors ◻ To identify customers who are at risk of leaving ◻ To help plan and design future marketing activities

Learning outcomes		Assessment criteria		Unit amplification
2	Understand an organisation's responses to customer relationships	2.1	Describe an organisation's marketing objectives and activities	▫ Objectives for all elements of the marketing mix (new product development/sales/distribution decisions) ▫ Possible marketing activities e.g. advertising, online marketing, sponsorship, direct mail, public relations
		2.2	Explain the importance of developing customer service plans and customer relationship plans	▫ Role and importance of customer relationship plans (to manage customer relationships, to meet customer needs and encourage loyalty, to allow an organisation to target resources at more profitable customers) ▫ Role and importance of customer service plans (to make clear to customers what they can expect, to provide useful information to customers such as contact details, to ensure staff know what is expected of them)
		2.3	Describe an organisation's system for relationship management	▫ What customer information is collected and how it is used ▫ What technology systems are used
		2.4	Describe an organisation's customer care programme	▫ Purpose and features of the organisation's customer care staff training programme
		2.5	Describe the system for communicating with customers	▫ Methods and purpose of communication ▫ Staff involved in communication
		2.6	Explain the importance of a consistent level of service	▫ Role of a consistent level of customer service in meeting customer expectations ▫ Repercussions of failure to ensure consistency e.g. dissatisfied customers, reputational damage, lost sales
		2.7	Explain the link between customer satisfaction and sales growth	▫ Effects of high levels of customer satisfaction (repeat business from existing customers, new customers attracted by recommendations/reputation)

Learning outcomes		Assessment criteria		Unit amplification
		2.8	Explain the importance of using customer feedback to enhance performance, products and/or services	◻ To identify problems and issues that need to be resolved ◻ To ensure customers can see that the organisation is listening to them ◻ To encourage loyalty and reduce risk of customers leaving
3	Understand the principles of customer relationship management	3.1	Explain the concept and principles of relationship management	◻ Maintaining and building customer relationships to maximise long-term value of the customer ◻ Understanding and meeting changing customer needs and wants
		3.2	Explain the importance of keeping promises made to customers	◻ Builds confidence and encourages continued custom ◻ Repercussions of failure to keep promises (major source of customer dissatisfaction, loss of trust)
		3.3	Explain the importance of balancing customers' needs with those of the organisation	◻ Importance of meeting customers' needs to retain and win business ◻ Importance of meeting organisation's own needs e.g. to make best use of limited resources, to operate efficiently, to maximise returns
		3.4	Explain the importance of keeping customers informed of progress, problems, issues and the actions undertaken in support of them	◻ Importance of keeping customers informed of progress, problems, issues and actions e.g. to manage customer expectations, to minimise customer frustration, to demonstrate a proactive approach to customer relations ◻ Importance of explaining solutions to problems, rather than excuses

Learning outcomes		Assessment criteria		Unit amplification
		3.5	Explain how to identify added value that could be offered to customers	▫ Use of customer feedback and behaviour analysis to identify what customers value ▫ Developing products/adding services to enhance value and encourage further custom

Information for tutors

Delivery

This unit lends itself to the use of real world case studies. It is recommended that examples used show how organisations relate to their customers through customer relationship management systems.

Customer relationship management (CRM) is often thought to relate to large-scale organisations, especially in the retail and services industries, but the principles underpinning CRM are also important for smaller businesses where customer relationships are managed less formally, for example a hairdressers or vegetable box delivery business. CRM also applies to organisations that may not have paying customers, for example national and local governmental organisations. The important point here is the idea that building and maintaining customer relationships is part of an overall strategy to ensure business survival and success. For this reason it would be advisable for learners to investigate a range of different types of organisations.

In relation to assessment criterion 2.4, the term 'customer care programme' should be understood as referring to training programmes in how to deliver good customer care that organisations provide to their staff.

There are links with other units. In particular, customer relationship management in learning outcome 3 overlaps with assessment criteria 4.1 and 5.1 in *Unit 4: Principles of Digital Marketing*.

Assessment

The centre will devise and mark the assessment for this unit. Learners must meet all assessment criteria to pass the unit.

Evidence for this unit could be provided using a written report. It could also include an oral or poster presentation.

Learner work should preferably include evidence of how one or more real organisations manage customer relationships to demonstrate application of theory in context. For learning outcome 2, the assessment criteria should ideally be restricted to one organisation.

Learning outcome 1

Assessment criteria 1.1, 1.2 and 1.4 could be linked to relate to a specific organisation or to several organisations. For 1.3, examples should be given of at least two emotional and two practical factors for a named product or service.

Learning outcome 2

This learning outcome is about how a named organisation develops and maintains customer relationships. How learners approach this will vary according to their choice of organisation so it must be one which will allow the learner to meet the assessment criteria. How much of the *Unit Amplification* for each assessment criterion is covered will also depend on the organisation chosen.

Assessment criterion 2.1 sets the scene. Learners should provide a brief description of the organisation's marketing objectives and activities. In 2.2 they must describe the use of customer relationship plans and customer service plans, preferably linking them with how they help the organisation to meet its marketing objectives. This could be through any or all of the marketing mix elements, according to the choice of organisation. Assessment criteria 2.6, 2.7 and 2.8 would fit well here as the 'why' of good customer service, before moving on to the 'how' which is dealt with in 2.3, 2.4 and 2.5.

Learning outcome 3

Learning outcome 3 covers the importance of customer relationship management in the marketing of products or services. Assessment should preferably use examples drawn from one or more organisations to discuss the principles of CRM. This gives the learner an opportunity to discuss the main purpose of CRM (3.1), how it fits in with long term goals, the need for the business to be profitable and the ongoing nature of customer relationships (3.2, 3.3 and 3.4). For 3.5, the learner must give at least one example of how added value opportunities might present themselves through the management of customer expectations.

Indicative resource materials

Textbook

Anderson K Kerr C – *Customer Relationship Management* (McGraw Hill, 2002)
ISBN 0071379541

Journal

Journal of Relationship Management

Unit 7: Understanding the Relationship Between Sales and Marketing

Unit reference number: F/502/8223

Level: 3

Credit value: 3

Guided learning hours: 21

Unit aim

This unit gives learners an understanding of the relationship between sales and marketing in business. It covers the impact of organisational structures on sales and marketing. It also includes how sales and marketing can work together and the problems that can occur. Finally, the unit deals with the impact of sales and marketing on product development.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the impact of different organisational structures on sales and marketing functions	1.1	Describe the features of different organisational structures	◻ Hierarchical (top down reporting through the line, often functionally defined, centralised decision making) ◻ Matrix (separate units which may be divisional, more flexible and autonomous, decentralised decision-making) ◻ Flat structures (wide span of control, fewer reporting lines, easier decision making, limited by size of the organisation)
		1.2	Explain the effect of different organisational structures on sales and marketing functions and their performance	◻ Communications effect (how different structures affect how quickly decisions about sales and marketing can be communicated, how different structures affect the ability of senior staff to stay in touch with reality on the ground) ◻ Control effect (how different structures enable or inhibit the sales and marketing functions in terms of decisions and authority)
2	Understand the interface between sales and marketing functions	2.1	Explain the role and responsibilities of sales personnel	◻ Identifying sales opportunities ◻ Closing sales ◻ Achieving sales targets ◻ Sales planning

Learning outcomes		Assessment criteria		Unit amplification
		2.2	Explain the role and responsibilities of marketing personnel	◻ Identifying marketing opportunities ◻ Carrying out marketing research ◻ Identifying and implementing product development opportunities ◻ Market development in new or existing markets ◻ Promotional roles e.g. advertising, PR and sales ◻ Distribution activities
		2.3	Describe areas of synergy between the sales and marketing functions	◻ Sales as part of the promotional mix to encourage purchase and sales objectives ◻ Direct interaction between sales staff and the customer used to inform marketing decisions e.g. gaps in the market or product development opportunities
		2.4	Describe the benefits of collaborative working to the performance of an organisation	◻ Sales staff can provide insights into customer needs, expectations and purchasing behaviour to inform strategy ◻ Sales staff can identify opportunities for product or market development ◻ Benefits of allowing sales staff to have input into marketing strategy (more effective strategy, more motivated sales staff)
		2.5	Explain potential causes of friction between the sales and marketing functions	◻ Differences between shorter-term sales objectives and longer-term marketing objectives e.g. sales staff want to offer discounts to close the deal ◻ Lack of understanding of specific sales conditions by marketing function, e.g. local market conditions ◻ Areas of conflict arising from overlapping decision-making responsibilities

Learning outcomes		Assessment criteria		Unit amplification
		2.6	Describe mutually acceptable solutions to identified sources of friction	◻ Involvement of sales personnel in marketing decision making and planning ◻ Establishing regular communications between the functions so that fine tuning to local planning could be done ◻ Regular updates provided to inform sales personnel about their role in achievement/progress of marketing objectives ◻ Clarifying and agreeing areas of responsibility and authority where these overlap
3	Understand the impact of sales and marketing on product development processes	3.1	Describe the product development process	◻ Generating ideas for new products or improvements to existing products ◻ Evaluation and screening to try out different ideas ◻ Feasibility and business analysis e.g. financial/capacity ◻ Product development, testing and launch
		3.2	Explain the role of sales and marketing in the product development process	◻ Identification of opportunities or gaps in the market from customer experience ◻ Exploration of new ideas and testing the market
		3.3	Explain the market features and trends relating to a product or service	◻ Market size (current and previous) ◻ Market growth (stage, rate and potential) ◻ Existing and potential competitors ◻ Market position
		3.4	Describe the characteristics and benefits of a product or service	◻ Characteristics (descriptive features of the product or service) ◻ Benefits (what the product or service can do for the customer)

Learning outcomes		Assessment criteria		Unit amplification
		3.5	Explain the wants and needs of an organisation's customer base	◻ Wants as subjective (coming from previous experience, marketing activities, recommendations of others, emotional purchase) ◻ Needs as objective (practical, rational purchase) ◻ Based on research into previous purchase behaviour and intentions for future purchase
		3.6	Describe how to prepare a business case for a product or service	◻ Financial factors (costs and projected returns) ◻ Marketing factors (is there a viable market? who is the target market?) ◻ Production/operations (is there capacity and/or expertise in production/operations?) ◻ Personnel factors (are there staffing issues that need to be dealt with?) ◻ Planning (predicted sales volumes, timescales and objectives)
		3.7	Describe how to forecast sales of a product or service	◻ Current business environment e.g. PEST factors, trends in purchasing behaviour ◻ Existing customer numbers and turnover ◻ Average sales for each customer each month ◻ Determining trends from projection of existing data

Learning outcomes		Assessment criteria		Unit amplification
		3.8	Explain the importance and use of customer feedback in relation to product development	◻ Gives information about customer satisfaction and dissatisfaction with current product ◻ Provides valid (real-life) information about customer experiences ◻ Use for improving product design/identify opportunities

Information for tutors

Delivery

This unit deals with the practicalities of managing the sales process as well as the recognition of the sales function within the broader marketing context. The key point to be emphasised in the delivery of this unit is the interdependence between these functions.

Ideally, this unit will be delivered using a mix of theory-based learning together with the use of real-life experience of the selling environment or relevant case studies.

Learning outcomes 1 and 2 deal with general theory about sales and marketing and their context within the organisation. Learning outcome 3 will, ideally, be delivered using examples of the exploration of customer needs and wants, and meeting these, using specific organisations as case studies.

Assessment

The centre will devise and mark the assessment for this unit. Learners must meet all assessment criteria to pass the unit.

One or more written reports would be an obvious choice of assessment vehicle for this unit, but alternatives could be used such as a mixture of written work and oral presentation.

Learning outcome 1

This learning outcome could be evidenced using a report describing organisational structures and their features and how the sales and marketing functions are affected by the structure. This would include how organisational structure can facilitate or inhibit the management and performance of sales and marketing (1.1 and 1.2). Knowledge should preferably be demonstrated with reference to one or more specific organisations.

Learning outcome 2

This learning outcome deals with what sales and marketing staff do and how their roles are connected. A single report covering all the assessment criteria could be produced, starting with their roles (2.1 and 2.2), followed by how they work together (2.3), the benefits of doing so (2.4), the problems that can occur (2.5) and how these can be solved.

Learning outcome 3

The most effective way of evidencing this learning outcome might be to base it on one or more real-life examples which deal with the successful development of products or services in response to customer needs and wants. Learners should be encouraged to discuss their choice with their tutor to make sure it is appropriate and sufficient. Assessment criteria 3.1, 3.2, 3.3, 3.4, 3.5 and 3.8 can be covered in an integrated way as shown below.

The first section of the report could include an explanation of the market features and trends as listed in 3.3. This would include a competitor analysis which could include one of a number of possible models, such as Porter’s 5 forces analysis and positioning maps.

An explanation of how customer needs and wants are met by the product or service could be included in the next part covering 3.4 and 3.5. How customer feedback is used in product development and the role of sales and marketing staff in this process could be covered together by integrating 3.2 and 3.8. These can then be contextualised in the description of each stage of the product development process (3.1).

3.7 is about the forecasting process so this could be approached by carrying out a forecast based on an existing product or service or a 'what if' scenario if all the information (such as sales data) is not available. The *Unit Amplification* needs to be covered fully to describe the basic steps to go through in forecasting sales.

The completion of assessment criteria 3.1-3.5 and 3.7 will then inform the preparation of a business case for 3.6 which is the culmination of the product (service) development process. Again, a real example, including recommendations of what could have been done differently, if necessary, will allow theory to be applied.

Indicative resource materials

Textbook

Jobber D and Lancaster G – *Selling and Sales Management (*Financial Times Press, 2009) ISBN-10: 0273720651

Journals

Journal of Marketing Management

Journal of Sales and Marketing Management

12 Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Edexcel, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/support/contact-us.html
- books, software and online resources for UK schools and colleges: www.pearsonschoolsandfecolleges.co.uk

Key publications:

- *Adjustments for candidates with disabilities and learning difficulties – Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications (Joint Council for Qualifications (JCQ))*
- *Equality Policy (Pearson)*
- *Recognition of Prior Learning Policy and Process (Pearson)*
- *UK Information Manual (Pearson)*
- *UK Quality Vocational Assurance Handbook (Pearson).*

All of these publications are available on our website.

Publications on the quality assurance of BTEC qualifications are available on our website at qualifications.pearson.com

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to qualifications.pearson.com

Additional resources

If you need further learning and teaching materials to support planning and delivery for your learners, there is a wide range of BTEC resources available.

Any publisher can seek endorsement for their resources, and, if they are successful, we will list their BTEC resources on our website, qualifications.pearson.com

13 Professional development and training

Pearson supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered on our website: qualifications.pearson.com

The support we offer focuses on a range of issues, such as:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing learner-centred learning and teaching approaches
- building in effective and efficient quality assurance systems.

The national programme of training we offer is on our website at: qualifications.pearson.com. You can request centre-based training through the website or you can contact one of our advisers in the Training from Pearson UK team via Customer Services to discuss your training needs.

BTEC training and support for the lifetime of the qualifications

Training and networks: our training programme ranges from free introductory events through sector-specific opportunities to detailed training on all aspects of delivery, assignments and assessment. We also host some regional network events to allow you to share your experiences, ideas and best practice with other BTEC colleagues in your region.

Regional support: our team of Curriculum Development Managers and Curriculum Support Consultants, based around the country, are responsible for providing advice and support in centres. They can help you with planning and curriculum developments.

To get in touch with our dedicated support teams please visit: qualifications.pearson.com

Your Pearson support team

Whether you want to talk to a sector specialist, browse online or submit your query for an individual response, there's someone in our Pearson support team to help you whenever – and however – you need:

- Subject Advisors: find out more about our subject advisor team – immediate, reliable support from a fellow subject expert
- Ask the Expert: submit your question online to our Ask the Expert online service and we will make sure your query is handled by a subject specialist.

Please visit, qualifications.pearson.com/en/support/contact-us.html

Annexe A

Mapping with NVQ/competence-based qualifications

The grid below maps the knowledge covered in the Pearson BTEC Level 2 Certificate in Principles of Marketing against the underpinning knowledge of the Pearson Level 2 NVQ Certificate in Marketing. Centres can use this mapping when planning holistic delivery and assessment activities.

KEY

# indicates partial coverage of knowledge in the NVQ unit

A blank space indicates no coverage of the knowledge

NVQ units	BTEC Specialist units	Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7
1	Collect and organise market research data	#				#	#	
2	Contribute to measuring the marketing response	#				#		
3	Work with other people in a business environment			#				#
4	Improve own performance in a business environment			#				
5	Contribute to conducting direct marketing campaigns	#	#					
6	Use digital and social media in marketing campaigns		#		#			
7	Analyse competitor activity	#						
8	Support the co-ordination of an event							

NVQ units / BTEC Specialist units		Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7
9	Database software (L1)							
10	Website software (L1)							
11	Bespoke software (L1)							
12	Presentation software (L1)							
13	Using collaborative technologies (L1)							
14	Database software (L2)							
15	Website software (L2)							
16	Bespoke software (L2)							
17	Presentation software (L2)							
18	Using collaborative technologies (L2)							
19	Word processing software (L2)							
20	Develop customer relationships	#					#	
21	Design and produce documents in a business environment							
22	Plan and organise an event							
23	Co-ordinate an event							

September 2017

For information about Edexcel, BTEC or LCCI qualifications visit qualifications.pearson.com

Pearson Education Limited. Registered in England and Wales No. 872828
Registered Office: 80 Strand, London WC2R 0RL.
VAT Reg No GB 278 537121