



Pearson
BTEC

Pearson BTEC
International Level 3 in
Marketing

Specification

First teaching from September 2020

L3

Issue 1

Pearson BTEC International Level 3 Qualifications in Marketing

Specification

First teaching November 2020

Issue 1

Edexcel, BTEC and LCCI qualifications

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Welcome

With a track record built over 40 years of learner success, our BTEC International Level 3 qualifications are recognised internationally by governments, industry and higher education. BTEC International Level 3 qualifications allow learners to progress to the workplace – either directly or via study at a higher level. Over 100,000 BTEC learners apply to university every year. Their Level 3 BTECs, either on their own or in combination with A Levels, are accepted by UK and international universities, and higher-education institutes for entry to relevant degree programmes.

Career-ready education

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

When creating the BTEC International Level 3 qualifications in this suite, we worked with many employers, higher-education providers, colleges and schools to ensure that we met their needs. Employers are looking for recruits who have a thorough grounding in the latest industry requirements and work-ready skills, for example teamwork. Learners who progress to higher education need experience of research, extended writing and meeting deadlines. BTEC qualifications provide the breadth and depth of learning to give learners this experience.

BTEC addresses these needs by offering:

- a range of BTEC qualification sizes, each with a clear purpose, so that there is something to suit each learner's choice of study programme and progression plans
- internationally relevant content, which is closely aligned with employer and higher-education needs
- assessments and projects chosen to help learners progress; this means that some assessments and projects are set by you to meet local needs, while others are set by Pearson, ensuring a core of skills and understanding common to all learners.

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

Collaborative development

Learners who complete their BTEC International Level 3 qualification in Marketing aim to go on to employment, often via the stepping stone of higher education. It was, therefore, essential that we developed these qualifications in close collaboration with experts from professional bodies, businesses and universities, and with the providers who will be delivering the qualifications. We engaged experts in the development of these qualifications to ensure that the content meets providers' needs and gives learners quality preparation to help them progress. We are grateful to all the university and further-education lecturers, teachers, employers, professional body representatives and other individuals who have generously shared their time and expertise to help us develop these new qualifications.

Employers, professional bodies and higher-education providers that have worked with us include:

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

Universities, professional bodies and businesses have provided letters of support confirming that these qualifications meet their entry requirements. The letters can be viewed on our website: qualifications.pearson.com.

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Introduction to the BTEC International Level 3 qualifications for the marketing sector

This specification contains all the information you need to deliver the Pearson BTEC International Level 3 Qualifications in Marketing. We also refer you to other handbooks and policies. This specification includes all the units for this/these qualifications.

These qualifications are part of the suite of marketing qualifications offered by Pearson. In this suite, there are qualifications that focus on different progression routes, allowing learners to choose the one best suited to their aspirations. These qualifications are not regulated in England.

All qualifications in the suite share some common units and assessments, which gives learners some flexibility in moving between sizes.

In the marketing sector these qualifications are:

Pearson BTEC International Level 3 Certificate in Marketing

Pearson BTEC International Level 3 Subsidiary Diploma in Marketing

Pearson BTEC International Level 3 Foundation Diploma in Marketing

Pearson BTEC International Level 3 Diploma in Marketing

Pearson BTEC International Level 3 Extended Diploma in Marketing.

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

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

Qualifications, sizes and purposes at a glance

Title	Size and structure	Summary purpose
Pearson BTEC International Level 3 Certificate in Marketing	180 GLH Equivalent in size to 0.5 of an International A Level. Two units, of which one is mandatory and assessed by a Pearson Set Assignment. Mandatory content (67%).	This qualification is designed to support learners who want an introduction to the sector through applied learning and for whom an element of marketing would be complementary. The qualification supports progression to higher education as part of a programme of study that includes other appropriate BTEC International Level 3 qualifications or International A Levels.
Pearson BTEC International Level 3 Subsidiary Diploma in Marketing	360 GLH Equivalent in size to one International A Level. Six units, of which three are mandatory and two are assessed by a Pearson Set Assignment. Mandatory content (67%).	This qualification is designed to support learners who are interested in learning about the marketing industry alongside other fields of study, with a view to progressing to a wide range of higher education courses, not necessarily in marketing-related subjects. The qualification is designed to be taken as part of a programme of study that includes other appropriate BTEC International Level 3 qualifications or International A Levels.
Pearson BTEC International Level 3 Foundation Diploma in Marketing	540 GLH Equivalent in size to 1.5 International A Levels. Nine units, of which five are mandatory and four which are assessed by a Pearson Set Assignment. Mandatory content (67%).	This qualification is designed to support learners who want to study marketing as a one-year, full-time course, or for those wanting to take it alongside another area of complementary or contrasting study as part of a two-year, full-time study programme. The qualification would support progression to higher education if taken as part of a programme of study that included other BTEC International Level 3 qualifications or International A Levels.

Title	Size and structure	Summary purpose
<p>Pearson BTEC International Level 3 Diploma in Marketing</p>	<p>720 GLH Equivalent in size to two International A Levels. At least ten units, of which seven are mandatory and four are assessed by Pearson Set Assignment. Mandatory content (83%).</p>	<p>This qualification is designed to support learners who want to study marketing as the main element alongside another area of complementary or contrasting study as part of a two-year, full-time study programme. The qualification would support progression to higher education if taken as part of a programme of study that included other BTEC International Level 3 qualifications or International A Levels.</p>
<p>Pearson BTEC International Level 3 Extended Diploma in Marketing</p>	<p>1080 GLH Equivalent in size to three International A Levels. At least 14 units, of which eight are Mandatory and five are assessed by Pearson Set Assignment. Mandatory content (61%).</p>	<p>This qualification is designed as a full-time course to support learners who want to study marketing as the main focus of a two-year, full-time study programme. The qualification would support progression to higher education in its own right.</p>

Structures of the qualifications at a glance

This table shows all the units and the qualifications to which they contribute. The full structure for this Pearson BTEC International Level 3 in Marketing is shown in *Section 2 Structure*. **You must refer to the full structure to select units and plan your programme.**

Key

Pearson Set Assignment	M	Mandatory units	O	Optional units
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Unit (number and title)	Unit size (GLH)	Certificate (180 GLH)	Subsidiary Diploma (360 GLH)	Foundation Diploma (540 GLH)	Diploma (720 GLH)	Extended Diploma (1080 GLH)
1 Marketing Principles	120	M	M	M	M	M
2 Investigating Customer Communications	60	O	M	M	M	M
3 Developing a Communications Plan	120		O	O	M	M
4 Investigating Digital Marketing	60	O	M	M	M	M
5 Developing a Digital Marketing Campaign	120		O	O	M	M
6 Branding Products and Services	60		O	M	M	M
7 Generating Customer Loyalty	60		O	M	M	M
8 Corporate Social Responsibility	60			O	O	M
9 Marketing an Event	120			O	O	O
10 Customer Immersive Experiences	60			O	O	O
11 Activating a Brand	60			O	O	O
12 Influencer Marketing	60			O	O	O
13 Market Research for a Start-up Business	60			O	O	O
14 Digital Analytics	60			O	O	O
15 International Business	60			O	O	O

Qualification and unit content

Pearson has developed the content of the new BTEC International Level 3 qualifications in collaboration with employers and representatives from higher education, and relevant professional bodies. In this way, we have ensured that content is up to date and that it includes the knowledge, understanding, skills and personal attributes required in the sector.

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

BTEC qualifications encompass applied learning that brings together knowledge and understanding with practical and technical skills. This applied learning is achieved through learners performing vocational tasks that encourage the development of appropriate vocational behaviours and transferable skills. Transferable skills are those such as communication, teamwork and research and analysis, which are valued in both higher education and the workplace. Opportunities to develop these skills are signposted in the units.

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

Centres should ensure that content, for example, content that references regulation, legislation, policies and regulatory/standards organisations, is kept up to date. The units include guidance on approaches to breadth and depth of coverage, which can be modified to ensure that content is current and reflects international variations.

Assessment

Assessment is designed to fit the purpose and objective of the qualification. It includes a range of assessment types and styles suited to vocational qualifications in the sector. All assessment is internal but some mandatory units have extra controls on assessment and are assessed using Pearson Set Assignments. Additionally, some units are synoptic.

Set assignment units

Some mandatory units in the qualifications are assessed using a set assignment. Each assessment is set by Pearson and may need to be taken under controlled conditions before it is marked by teachers.

Set assignment units are subject to external standards verification processes common to all BTEC units. By setting an assignment for some units, we can ensure that all learners take the same assessment for a specific unit. Learners are permitted to resit set assignment units during their programme. Please see *Section 6 Internal assessment* for further information.

Set assignments are available from September each year and are valid for one year only. For detailed information on the Pearson Set Assignment, please see the table in *Section 2 Structure*. For further information on preparing for assessment, see *Section 5 Assessment structure*.

Internal assessment

All units in the sector are internally assessed and subject to external standards verification. Before you assess you will need to become an approved centre, if you are not one already. You will need to prepare to assess using the guidance in *Section 6 Internal assessment*.

For units where there is no Pearson Set Assignment, you select the most appropriate assessment styles according to the learning set out in the unit. This ensures that learners are assessed using a variety of styles to help them develop a broad range of transferable skills. Learners could be given opportunities to:

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

For these units, Pearson will provide an Authorised Assignment brief that you can use. You will make grading decisions based on the requirements and supporting guidance given in the units. Learners may not make repeated submissions of assignment evidence. For further information, please see *Section 6 Internal assessment*.

Language of assessment

Assessment of the units for these qualifications is available in English but can be translated as necessary.

A learner taking the qualification/s may be assessed in sign language where it is permitted for the purpose of reasonable adjustment. For information on reasonable adjustments, see *Section 7 Administrative arrangements*.

Grading for units and qualifications

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

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

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

1 Qualification purpose and progression

Pearson BTEC International Level 3 qualifications in Marketing

Who are these qualifications for?

The Pearson BTEC International Level 3 qualifications in Marketing are designed either for learners in the 16–19 age group, who wish to pursue a career in marketing via higher education to access graduate entry employment with businesses, or alternatively through junior business employment in the marketing industry.

The qualifications could be taken alongside a Pearson BTEC Level 3 National Diploma in Creative Digital Media Production, Travel and Tourism, IT, Photography or Graphics, thereby broadening learners' potential career options.

Which size qualification to choose?

Choosing the most suitable size of qualification will depend on the learner's broader programme of study. For example, a learner who wishes to focus solely on marketing may take the Diploma or Extended Diploma, while a learner who selects a smaller qualification, such as the Certificate or Subsidiary Diploma, may choose to combine it with qualifications from other sectors, in order to support their desired progression. Smaller qualifications are also suitable for learners who are in employment and studying part-time.

Qualification structures have been designed to enable a learner who starts with the smallest qualification to progress easily to the larger qualifications.

What do these qualifications cover?

The content of this qualification has been designed to support progression to particular roles in marketing, either directly into entry-level roles linked to these occupational areas or, more likely, via particular higher-education routes in the particular areas. The qualification content has been designed in consultation with employers, professional bodies and higher-education providers to ensure that the content is appropriate for the progression routes identified.

All learners will be required to take mandatory content that is directly relevant to progression routes in all of the identified areas. Depending on the chosen course, these may include the following:

- Marketing Principles
- Investigating Customer Communications
- Investigating Digital Marketing
- Developing a Digital Marketing Campaign
- Branding Products and Services
- Generating Customer Loyalty
- Corporate Social Responsibility.

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

In addition, learners can have the flexibility to take a wide range of optional units:

- Marketing an Event
- Customer Immersive Experiences
- Activating a Brand
- Influencer Marketing
- Market Research
- Digital Analytics
- International Business

What could these qualifications lead to?

These qualifications give learners the opportunity to progress to higher education to study for CIM qualifications and for a degree in marketing or a degree where marketing related skills and knowledge may be advantageous. For example:

- BA (Hons) in Marketing
- BSc (Hons) in International Business and Marketing
- BA (Hons) in Business Management and Marketing
- BA (Hons) in Digital Marketing

NB: learners should always check entry requirements for degree programmes with the relevant higher education provider.

How do these qualifications provide transferable employability skills?

In the BTEC International Level 3 units, there are opportunities during the teaching and learning phase to give learners practice in developing employability skills. Where we refer to employability skills in this specification, we are generally referring to skills in the following three main categories:

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

There are also specific requirements in some units for assessment of these skills where relevant, for example, where learners are required to undertake real or simulated activities. These skills are indicated in the units and in *Appendix 1: Transferable employability skills*.

How do the qualifications provide transferable knowledge and skills for higher education?

All BTEC International Level 3 qualifications provide transferable knowledge and skills that prepare learners for progression to university. The transferable skills that universities value include:

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

BTEC learners can also benefit from opportunities for deep learning, where they are able to make connections across units and select areas of interest for detailed study. BTEC International Level 3 qualifications provide a vocational context in which learners can develop the knowledge and skills required for particular degree courses, including:

- analytical skills
- creative development
- preparation for assessment methods used in a degree.

2 Structure

Qualification structures

The structures for the qualifications in this specification are:

- Pearson BTEC International Level 3 Certificate in Marketing
- Pearson BTEC International Level 3 Subsidiary Diploma in Marketing
- Pearson BTEC International Level 3 Foundation Diploma in Marketing
- Pearson BTEC International Level 3 Diploma in Marketing
- Pearson BTEC International Level 3 Extended Diploma in Marketing.

Pearson BTEC International Level 3 Certificate in Marketing

Mandatory units

There is one mandatory unit, that is a set-assignment unit. Learners must complete and achieve a Pass or above in all mandatory units.

Optional units

Learners must complete at least one optional unit.

Pearson BTEC International Level 3 Certificate in Marketing				
Unit number	Unit title	GLH	Type	How assessed
Mandatory units – learners complete and achieve all units				
1	Marketing Principles	120	Mandatory	Set assignment
Optional units- learners complete one unit				
2	Investigating Customer Communications	60	Optional	Internal
4	Investigating Digital Marketing	60	Optional	Internal

Pearson BTEC International Level 3 Subsidiary Diploma in Marketing

Mandatory units

There are two mandatory units that are set-assignment assessment units. Learners must complete and achieve a Pass or above in all mandatory units.

Optional units

Learners must complete optional units to a minimum value of 120 GLH.

Pearson BTEC International Level 3 Subsidiary Diploma in Marketing				
Unit number	Unit title	GLH	Type	How assessed
Mandatory units – learners complete and achieve all units				
1	Marketing Principles	120	Mandatory	Set assignment
2	Investigating Customer Communications	60	Mandatory	Internal
4	Investigating Digital Marketing	60	Mandatory	Internal
Optional units – learners complete optional units to a minimum value of 120 GLH				
3	Developing a Communications Plan	120	Optional	Set assignment
5	Developing a Digital Marketing Campaign	120	Optional	Internal
6	Branding Products and Services	60	Optional	Set assignment
7	Generating Customer Loyalty	60	Optional	Set assignment

Pearson BTEC International Level 3 Foundation Diploma in Marketing

Mandatory units

There are five mandatory units, two internal units and three set assignment units. Learners must complete and achieve a Pass or above in all mandatory units.

Optional units

Learners must complete optional units to a minimum value of 180 GLH.

Pearson BTEC International Level 3 Foundation Diploma in Marketing				
Unit number	Unit title	GLH	Type	How assessed
Mandatory units – learners complete and achieve all units				
1	Marketing Principles	120	Mandatory	Set assignment
2	Investigating Customer Communications	60	Mandatory	Internal
4	Investigating Digital Marketing	60	Mandatory	Internal
6	Branding Products and Services	60	Mandatory	Set assignment
7	Generating Customer Loyalty	60	Mandatory	Set assignment
Optional units – learners complete optional units to a minimum value of 180 GLH				
3	Developing a Communications Plan	120	Optional	Set assignment
5	Developing a Digital Marketing Campaign	120	Optional	Internal
8	Corporate Social Responsibility	60	Optional	Set assignment
9	Marketing an Event	60	Optional	Internal
10	Customer Immersive Experiences	60	Optional	Internal
11	Activating a Brand	60	Optional	Internal
12	Influencer Marketing	60	Optional	Internal
13	Market Research for a Start-up Business	60	Optional	Internal
14	Digital Analytics	60	Optional	Internal
15	International Business	60	Optional	Internal

Pearson BTEC International Level 3 Diploma in Marketing

Mandatory units

There are seven mandatory units, three internal units and four set assignment units. Learners must complete and achieve a Pass or above in all mandatory units.

Optional units

Learners must complete optional units to the value of 120 GLH.

Pearson BTEC International Level 3 Diploma in Marketing				
Unit number	Unit title	GLH	Type	How assessed
Mandatory units – learners complete and achieve all units				
1	Marketing Principles	120	Mandatory	Set assignment
2	Investigating Customer Communications	60	Mandatory	Internal
3	Developing a Communication Plan	120	Mandatory	Set assignment
4	Investigating Digital Marketing	60	Mandatory	Internal
5	Developing a Digital Marketing Campaign	120	Mandatory	Internal
6	Branding Products and Services	60	Mandatory	Set assignment
7	Generating Customer Loyalty	60	Mandatory	Set assignment
Optional units – learners complete optional units to the minimum value 120 GLH				
8	Corporate Social Responsibility	60	Optional	Set assignment
9	Marketing an Event	120	Optional	Internal
10	Customer Immersive Experiences	60	Optional	Internal
11	Activating a Brand	60	Optional	Internal
12	Influencer Marketing	60	Optional	Internal
13	Market Research for a Start-up Business	60	Optional	Internal
14	Digital Analytics	60	Optional	Internal
15	International Business	60	Optional	Internal

Pearson BTEC International Level 3 Extended Diploma in Marketing

Mandatory units

There are eight mandatory units, three internal units and five set assignment units. Learners must complete and achieve a Pass or above in all mandatory units.

Optional units

Learners must complete optional to a minimum value of 420 GLH.

Pearson BTEC International Level 3 Extended Diploma in Marketing				
Unit number	Unit title	GLH	Type	How assessed
Mandatory units – learners complete and achieve all units				
1	Marketing Principles	120	Mandatory	Set assignment
2	Investigating Customer Communications	60	Mandatory	internal
3	Developing a Communications Plan	120	Mandatory	Set assignment
4	Investigating Digital Marketing	60	Mandatory	Internal
5	Developing a Digital Marketing Campaign	120	Mandatory	Internal
6	Branding Products and Services	60	Mandatory	Set assignment
7	Generating Customer Loyalty	60	Mandatory	Set assignment
8	Corporate Social Responsibility	60	Mandatory	Set assignment
Optional units – learners complete optional units to a minimum value of 480 GLH				
9	Marketing an Event	120	Optional	Internal
10	Customer Immersive Experiences	60	Optional	Internal
11	Activating a Brand	60	Optional	Internal
12	Influencer Marketing	60	Optional	Internal
13	Market Research for a Start-up Business	60	Optional	Internal
14	Digital Analytics	60	Optional	Internal
15	International Business	60	Optional	Internal

Set assignment units

This is a summary of the type and availability of set assignment units. For more information, see *Section 5 Assessment structure*, and the units and sample assessment materials.

Unit	Type	Availability
Unit 1: Marketing Principles	<ul style="list-style-type: none">• An assignment set by Pearson and marked by the centre.• The advised period is 10-15 hours.• Completed using a computer.	Two available for each one-year period.
Unit 3: Developing a Communication Plan	<ul style="list-style-type: none">• An assignment set by Pearson and marked by the centre.• The advised period is 10 hours.• Completed using a computer.	Two available for each one-year period.
Unit 6 Branding Products and Services	<ul style="list-style-type: none">• An assignment set by Pearson and marked by the centre.• The advised period is 10 hours.• Completed using a computer.	Two available for each one-year period.
Unit 7: Generating Customer Loyalty	<ul style="list-style-type: none">• An assignment set by Pearson and marked by the centre.• The advised period is 10 hours.• Completed using a computer.	Two available for each one-year period.
Unit 8: Corporate Social Responsibility	<ul style="list-style-type: none">• An assignment set by Pearson and marked by the centre.• The advised period is 10 hours.• Completed using a computer.	Two available for each one-year period.

Employer involvement in assessment and delivery

You are encouraged to give learners opportunities to be involved with employers. For more information, please see *Section 4 Planning your programme*.

3 Units

Understanding your units

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

Each unit in the specification is set out in a similar way. This section explains how the units work. It is important that all teachers, assessors, internal verifiers and other staff responsible for the programme review this section.

Section	Explanation
Unit number	The number is in a sequence in the sector. Numbers may not be sequential for an individual qualification.
Unit title	This is the formal title that we always use, it appears on certificates.
Level	All units are at Level 3.
Unit type	This shows if the unit is internal or assessed using a Pearson Set Assignment. See structure information in <i>Section 2 Structure</i> for details.
Guided Learning Hours (GLH)	Units may have a GLH value of 120 or 60. This indicates the numbers of hours of teaching, directed activity and assessment expected. It also shows the weighting of the unit in the final qualification grade.
Unit in brief	This is a brief formal statement on the content of the unit that is helpful in understanding its role in the qualification. You can use this in summary documents, brochures, etc.
Unit introduction	This is written with learners in mind. It indicates why the unit is important, how learning is structured and how it might be applied when they progress to employment or higher education.
Assessment	For internal set assignment units, this section states whether set assignments are required to be completed.
Learning aims	These help to define the scope, style and depth of learning of the unit. You can see where learners should be learning standard requirements ('understand') or where they should be actively researching ('investigate'). You can find out more about the verbs we use in learning aims in <i>Appendix 2: Glossary of terms used</i> .
Summary of unit	This section helps teachers to see at a glance the main content areas given against the learning aims and the structure of the assessment. The content areas and structure of assessment must be covered. The forms of evidence given are suitable to fulfil the requirement.

Section	Explanation
Content	This section sets out the required teaching content of the unit. Content is compulsory except when shown as 'e.g.'. Learners should be asked to complete summative assessment only after the teaching content for the unit or learning aim(s) has been covered.
Assessment criteria	Each learning aim has Pass and Merit criteria. Each assignment has at least one Distinction criterion. A full glossary of terms used is given in <i>Appendix 2: Glossary of terms used</i> . All assessors need to understand our expectations of the terms used. Distinction criteria represent outstanding performance in the unit. Some criteria require learners to draw together learning from across the learning aims.
Essential information for assignments	This shows the maximum number of assignments that may be used for the unit to allow for effective summative assessment and how the assessment criteria should be used to assess performance. For set assignment units, this section will include any conditions for taking the assignment.
Further information for teachers and assessors	This section gives you information to support the implementation of assessment. It is important that this is read carefully alongside the assessment criteria, as the information will help with interpretation of the requirements.
Resource requirements	Any specific resources that you need to be able to teach and assess are listed in this section. For information on support resources, see <i>Section 10 Resources and support</i> .
Essential information for assessment decisions	This section gives guidance on and examples for each learning aim or assignment of the expectations for Pass, Merit and Distinction standard.
Assessment controls	This section gives details of the rules that learners need to abide by when taking the assessment.
Links to other units	This section shows you the main relationships between different units. This helps you to structure your programme and make best use of available materials and resources.
Employer involvement	This section gives you information on the units, which can be used to involve learners with employers. This will help you to identify the kind of involvement that is likely to be most successful.
Opportunities to develop transferable employability skills	This section gives you guidance on how transferable employability skills might be developed in teaching and assessment of the unit.

Index of units

This section contains all the units developed for these qualifications. Please refer to *page 4* to check which units are available in all qualifications in the marketing sector.

Unit 1: Marketing Principles	21
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Unit 3: Developing a Communications Plan	41
Unit 4: Investigating Digital Marketing	49
Unit 5: Developing a Digital Marketing Campaign	59
Unit 6: Branding Products and Services	69
Unit 7: Generating Customer Loyalty	77
Unit 8: Corporate Social Responsibility	85
Unit 9: Marketing an Event	93
Unit 10: Customer Immersion Experiences	103
Unit 11: Activating a Brand	113
Unit 12: Influencer Marketing	123
Unit 13: Market Research for a Start-up Business	133
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Unit 1: Marketing Principles

Level: 3

Unit type: Internal set assignment

Guided learning hours: 120

Unit in brief

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

Unit introduction

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

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

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

Assessment

This unit has a set assignment. Learners must complete a Pearson Set Assignment Brief.

Learning aims

In this unit you will:

- A** Understand the role of marketing and its application in a given context
- B** Research and analyse the market in a given context
- C** Explore market segmentation, targeting, and consumer buying behaviour in a given context
- D** Develop a marketing strategy for a given context.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Understand the role of marketing and its application in a given context	A1 Role of marketing A2 Business and organisation aims and marketing objectives	A report evaluating the role of marketing and its importance to a given context.
B Research and analyse the market in a given context	B1 Researching the market B2 Appropriateness, validity and reliability of research B3 Marketing environment analysis	A report evaluating the findings of own comprehensive market research and the importance of segmentation and targeting and how these affect consumer buyer behaviour in a given context. Research data should be included as appendices to the report.
C Explore market segmentation, targeting, and consumer buying behaviour in a given context	C1 Market segmentation, targeting and positioning C2 Consumer buyer behaviour	
D Develop a marketing strategy for a given context	D1 Product D2 Price D3 Place D4 Promotion D5 People D6 Process D7 Physical evidence D8 Benefits of a coordinated and synchronised marketing mix D9 Marketing mix in different B2B and B2C contexts	A report including details of the marketing strategy and justification of decisions made in the marketing strategy for a given context

Content

Learning aim A: Understand the role of marketing and its application in a given context

A1 Role of marketing

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

A2 Business and organisation aims and marketing objectives

- Business/organisation aims:
 - for-profit: to break even, to survive, to have loyal customers, to maximise profits and forward those profits to owners and shareholders
 - not-for-profit: to provide for society's needs.
- Marketing objectives based on research:
 - research on: competitors, sales, profit and forecasts
 - SMART: specific, measurable, achievable, relevant and time-bound targets e.g. customer satisfaction, maintain/increase sales/market share, maintain/increase revenue, build/increase brand awareness and loyalty, develop/launch new goods and services, customer retention, acquire new customers, enter new markets, enhance customer relationships, understand the wants, needs and aspirations of customers, gain an advantage over competitors, engage stakeholders, change buying behaviour, encourage digital engagement.

Learning aim B: Research and analyse the market in a given context

B1 Researching the market

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

B2 Appropriateness, validity and reliability of research

- Judging the quality of market research: appropriateness, cost, accuracy, currency.
- Reliability: consistency or repeatability of results.
- Validity of sample intention, sufficiency and results.

B3 Marketing environment analysis

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

Learning aim C: Explore market segmentation, targeting, and consumer buying behaviour in a given context

C1 Market segmentation, targeting and positioning

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

C2 Consumer buying behaviour

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

Learning aim D: Develop a marketing strategy for a given context

D1 Product

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

D2 Price

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

D3 Place

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

D4 Promotion

- Communication through traditional and digital marketing methods:
 - channels
 - print: newspaper, magazine, brochure, catalogue, billboards, flyer, poster, banner, direct mail
 - digital – streaming, email, blog, social media, banner, pop-up
 - broadcast: TV, radio
 - traditional: direct mail, telephone, face to face
 - methods
 - advertising: above the line, below the line
 - sponsorship, endorsement
 - public relations (PR), online public relations (OPR)
 - social media, influencers, hashtag campaigns, viral marketing
 - personal selling, special offers
 - product placement
 - trade shows, exhibitions, event marketing
 - guerrilla marketing
 - pop-ups, interactive ads
 - branding
 - brand personality, brand image.
- Push and pull marketing:
 - push: tries to push products towards customers
 - pull: raises awareness and generates demand for a product, targets the right customers at the right time and pulls them towards a product.
- Multichannel marketing using a range of methods.
- Factors to consider when deciding on a marketing channel: organisational objectives, ease of reaching target market, accessibility of information and contents of message, speed, cost, measurability of marketing success, competitors' activities, brand image and development.

D5 People

- Employees must be: suited to the role trained, motivated and able to give consistent and reliable customer service, motivated to exceed customer expectations and buy into the brand concept.

D6 Process

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

D7 Physical evidence

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

D8 Benefits of a coordinated and synchronised marketing mix

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

D9 The marketing mix in different B2C and B2B contexts

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

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Understand the role of marketing and its application in a given context		A.D1 Evaluate the role and importance of marketing in a given context.
A.P1 Explain the role of marketing in meeting aims and objectives in a given context. A.P2 Explain the importance of marketing for exchanges between organisations, customers and suppliers in a given context.	A.M1 Assess the role and importance of marketing in meeting aims and objectives in a given context.	
Learning aim B: Research and analyse the market in a given context		BC.D2 Evaluate the importance of segmentation and targeting and how these affect consumer buyer behaviour with reference to findings of own comprehensive market research in a given context.
B.P3 Research the market for a given context using different methods and tools. B.P4 Explain features of a market for a given context.	B.M2 Analyse a market for a given context, based on own detailed market research.	
Learning aim C: Explore market segmentation, targeting, and consumer buying behaviour in a given context		BC.D2 Evaluate the importance of segmentation and targeting and how these affect consumer buyer behaviour with reference to findings of own comprehensive market research in a given context.
C.P5 Explain the market segmentation and targeting in a given context. C.P6 Explain the consumer buyer behaviour in a given context.	C.M3 Analyse the importance of segmentation and targeting and how and why these affect consumer buyer behaviour in a given context.	
Learning aim D: Develop a marketing strategy for a given context		D.D3 Justify decisions made in the marketing strategy for a given context.
D.P7 Develop a marketing strategy for a given context. D.P8 Explain decisions made in the marketing strategy for a given context.	D.M4 Assess decisions made in the marketing strategy for a given context.	

Essential information for assignments

This unit is assessed using a Pearson Set Assignment Brief. A set assignment must be used to assess learners.

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aim A

For Distinction standard, learners will draw on the varied information from the given context and consider the relevance and significance of the role of marketing. This will lead to a supported judgement showing the relationship of marketing to the given context. There will be a supported conclusion as to the effectiveness of the role of marketing in the given context.

For Merit standard, learners will present a careful consideration of how marketing meets aims and objectives in the given context. They will consider the most important factors to arrive at a conclusion.

For Pass standard, learners will show knowledge and understanding of the role and the importance of marketing in meeting aims and objectives in a given context supported by examples and how this helps the organisation to make exchanges between organisations, customers and suppliers.

Learning aims B and C

For Distinction standard, learners will make considered comments on the appropriateness, validity and reliability of the research gathered. A range of analytical tools will be used, which fully address the given context. They will draw on their varied research and information gathered about the segmentation and targeting and consider the relevance and significance in affecting consumer buyer behaviour. They will arrive at a supported judgement showing a full relationship to the given context and this will be in the form of a conclusion.

For Merit standard, learners will undertake market research in a specific market sector using a wide range of research sources. They will comment on the appropriateness, reliability and validity of the research gathered. Learners will use their research findings to conduct an analysis that enables them to clearly identify the key factors of segmentation and targeting in the given context. They will use this information or data to interpret and study key trends and interrelationships between the segmentation, targeting and consumer buyer behaviour in the given context.

For Pass standard, learners will undertake market research in a specific market sector using research sources. They will show some understanding of the market in the given context, but this will not have been analysed. They will show understanding of the segmentation and targeting used in the given context and of the consumer buyer behaviour, but there will be limited understanding of how these are related.

Learning aim D

For Distinction standard, learners will fully justify, using supporting research, the decisions that they have made when developing the marketing strategy for the given context. The 7Ps will have been covered fully and equally. There will be a thorough understanding of how the Ps are coordinated to ensure that the needs of the target segment are met.

For Merit standard, learners will use their research to identify the factors in their decision making for their marketing strategy for the given context. They will use this information to interpret the interrelationship between the 7Ps; however, not all of the 7Ps may be covered equally. There will be some consideration of how the Ps are coordinated to ensure the needs of the target segment are met; however, there may be some errors.

For Pass standard, learners will develop a marketing strategy using the 7Ps for a given context, but there will be limited understanding of how these coordinate with each other. They will show some understanding of why they made these decisions by giving examples and reasons. There will be errors or some of the Ps will be missing.

Assessment controls

Time: this assignment has a recommended time period. This is for advice only and can be adjusted depending on the needs of learners.

Supervision: you should be confident of the authenticity of learner's work. This may mean that learners be supervised.

Resources: all learners should have access to the same types of resources to complete the assignment.

Research: learners should be given the opportunity to carry out research outside of the learning context if required for the assignment.

Links to other units

This unit links to *Unit 12: Influencer Marketing*.

Employer involvement

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

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

Opportunities to develop transferable employability skills

Planning and time-management skills

Design and creativity skills

Presentation skills

Verbal and non-verbal communication skills.

Unit 2: Investigating Customer Communications

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

Learners develop understanding of segmentation, targeting and positioning and influences on the customer decision-making process.

Unit introduction

Customer communications is a key component in the overall marketing strategy of an organisation to engage customers. Organisations may have many different types of customers. Understanding how to best engage with these customers by segmenting and targeting them means that organisations can better meet the customers and the organisation's needs. By understanding their different buying decision processes, organisations use this information to retain customers, gain new customers or launch new products.

In this unit, you will look at the variety of different methods that can be used to segment and target a variety of different customers in different buying contexts, including business to business (B2B), business to customers (B2C) and not for profit (NFP). You will then be given some detailed information on a given business within a given theme and will need to evaluate the stages and influences on the buying decision-making process for a selected customer segment that you have deemed relevant.

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

Learning aims

In this unit you will:

- A** Explore segmentation, targeting and positioning
- B** Understand how customers make buying decisions
- C** Explore different customer segments and bases for a selected communications plan.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Explore segmentation, targeting and positioning	A1 Different types of customer A2 Customer segments A3 Purpose and methods of segmenting customers A4 Purpose and methods of targeting customers A5 Purpose and methods of positioning customers	<p>A report evaluating the different methods of segmentation, targeting and positioning used for different customers and the stages and influences on their buying decision-making process.</p>
B Understand how customers make buying decisions	B1 Customer decision-making process B2 Influences on customer decision making	
C Explore different customer segments and bases for a selected communications plan	C1 Purpose of a selected communications plan C2 Suitable targets for a selected communications plan C3 Buying decision-making process for identified segments for a selected communications plan	<p>A report in response to a given case study on a selected business and a given customer communications plan theme, evaluating the stages and influences on the buying decision making process for a selected customer segment.</p>

Content

Learning aim A: Explore segmentation, targeting and positioning

A1 Different types of customer

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

A2 Customer segments

- Define the meaning of customer segments in different buying contexts:
 - Demographic: age, generation, gender, education, occupation, income, marital status, ethnicity
 - Geographic: country, state, region, climate, market size
 - Behavioural: occasion, usage, thought process
 - Lifecycle: understanding which stage of the buying process a customer is in, e.g. visited online store but not purchased, bought only once in last 6 months, bought only in last 12 months.

A3 Purpose and methods of segmenting customers

- Segmentation: the categorisation of stakeholders into homogenous groups.
- Purpose of segmentation:
 - matching the right customer to the appropriate organisational strength so that marketing resources are used efficiently
 - to give a greater return on investment (ROI).
- Benefits of segmentation for customers:
 - belief that their needs, desires and beliefs are best satisfied
 - receive a tailored experience
 - improved experiences.
- Benefits of segmentation for organisations:
 - maximise sales
 - maximise profits
 - ability to advertise a unique selling benefit, therefore better brand management
 - customer loyalty
 - develop products at a lower cost due to resources delivering an increased return on investment
 - fewer advertising and promotion channels needed
 - lower promotion costs as messages can be repeated only in spaces where segmented customers will hear them
 - potentially fewer distribution channels
 - reduction of sales costs.

- Segmentation bases:
 - B2C – by type of customer, e.g. demographics – age, sex, income, education, industry, profession – by spending behaviour, e.g. how often people buy, how much they spend, when they buy – by social media usage, e.g. access to social data to customise campaigns based on interests, friends/followers to become brand advocates, education
 - B2B – by organisation type, size, purpose, budget capacity and job function – by organisation volume and regularity of purchases – by organisation products, services and client base – by organisation culture, ethos and innovative capacity – by organisation requirements and relationship
 - not-for-profit – by donor/ member type – by fundraising capability.

A4 Purpose and methods of targeting customers

- Targeting: concentrating marketing on one or a few key segments consisting of the customers whose needs most closely match the product or service offering.
- Purpose of targeting: to attract new business, increase sales and boost business success.
- Methods of targeting:
 - special discounts, rewards and priority access to new products
 - upsell relevant products and services to encourage more spending.

A5 Purpose and methods of positioning customers

- Positioning: promoting a product or service to a particular market segment to fulfil specific requirements.
- Purpose of positioning: to determine the greatest opportunity exists to increase sales, provide value to customers by meeting customer needs and expectations, to concentrate efforts on what the company does particularly well in comparison with its competitors.
- Methods of positioning:
 - customer needs and perceptions
 - brand recognition
 - pricing
 - quality, convenience and customer service.

Learning aim B: Understand how customers make buying decisions

B1 Customer decision-making process

- Stages in the customer's decision-making process:
 - need recognition
 - information gathering
 - evaluation of alternatives
 - purchase decision
 - post purchase review and evaluation
 - potential repeat purchase.

- Decision-making units (DMUs):
 - initiators
 - gatekeepers
 - buyers
 - deciders
 - users
 - influencers.
- Customer decision making in different contexts:
 - business to business (B2B)
 - business to customer (B2C)
 - not for profit (NFP).
- Generating customer loyalty.

B2 Influences on customer decision making

- Influences on individual decision making:
 - purchasing power
 - group influence
 - personal preferences
 - economic conditions
 - marketing campaigns
 - scarcity.
- Influences on organisational decision making:
 - business objectives
 - budgets
 - culture
 - decision makers
 - attitude to risk
 - availability of data
 - external environment.
- Online influences on decision making:
 - product/service reviews
 - websites, e.g. ease of use, comfort, jargon-free, product updates
 - social pressure
 - exposure
 - social media following
 - after-sales services.
- Offline influences on decision making:
 - face-to-face conversation with salesperson
 - face-to-face conversation with family/friends
 - recommendations
 - social pressure
 - social norms and expectations
 - exposure
 - experiences
 - in-store ambience
 - emotional connections.

Learning aim C: Explore different customer segments and bases for a selected communications plan

C1 Purpose of a selected communications plan

- Customer acquisition.
- Customer retention.
- New product launch.

C2 Suitable targets for a selected communications plan

- Selected customer segments which would be suitable targets depending on the:
 - purpose of the communications plan
 - nature of the business
 - aims of the business
 - nature of the products/services
 - current customer base
 - potential new customer base
 - distribution network
 - competition.
- Suitability of the bases used to segment the market.

C3 Buying decision-making process for identified segments for a selected communications plan

- Stages of the buying decision-making process for selected segments.
- Influences on the decision making for selected customers at each stage of the buying decision-making process.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Explore segmentation, targeting and positioning		AB.D1 Evaluate methods of segmentation, targeting and positioning and the stages and influences on their decision making for different customers.
A.P1 Explain different types and methods of customer segmentation. A.P2 Explain different methods of targeting and positioning customers.	A.M1 Analyse methods of segmentation, targeting and positioning for different customers.	
Learning aim B: Understand how customers make buying decisions		
B.P3 Explain the stages of the customer decision-making process for different customers. B.P4 Explain the influences on the decision-making process for different customers at each stage.	B.M2 Analyse the stages and the influences on the customer decision-making process for different customers.	
Learning aim C: Explore different customer segments and bases for a selected communications plan		C.D2 Evaluate the significance of the stages and influence on the buying decision making process for the selected customer segment for a communications plan.
C.P5 Explain different customer segments and bases which would be suitable targets for a communications plan. C.P6 Explain the stages and influences on the buying decision making process for a selected customer segment for a communications plan.	C.M3 Assess the stages and influences on the buying decision making process for a selected customer segment for a communications plan.	

Essential information for assignments

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

There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

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

Learning aim: C (C.P5, C.P6, C.M3, C.D2)

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aims A and B

For Distinction standard, learners will draw on varied information in order to consider the strengths and weaknesses of various methods of segmentation, targeting and positioning for a range of different customers in the three different buying contexts (B2B, B2C and NFP). These can be of the learners'/centre's choice. Learners will draw on varied information to consider the relevance and significance of different stages and influences for the different customers in the different buying contexts. They will make a supported judgement showing the relationship between the segmentation, targeting and positioning for selected customers in different contexts and the relevance of the stages and influences on their buying decision-making process.

For Merit standard, learners will present a methodical and detailed examination of the inter-relationship between the different methods of segmentation, targeting and positioning for a range of different customers and the different buying contexts in which they operate. In addition, they will examine the inter-relationship between the segmentation, targeting and positioning for selected customers in different contexts and the stages and influences on their buying decision-making process.

For Pass standard, learners will need to give examples of the type of segmentation, targeting and positioning for at least two customer segments in at least one buying context. They will give a brief account of different stages of the buyer decision-making process for at least two different customers, giving reasons for the influences at each stage.

Learning aim C

For Distinction standard, learners will make a supported judgement as to the significance of the customer segment. Using this customer segment, they will draw on information from a number of sources to consider the relevance of the buying decision-making process to the selected segment. A supported judgement will be made of the fully relevant influences on the chosen segment at each stage of the buying decision-making process.

For Merit standard, learners will consider one customer segment relevant to the given theme. They will justify the selection of the segment in the context of the given theme and provide a careful consideration of the segmentation bases used in defining the segment.

For Pass standard, learners will provide details of two customer segments that are relevant to the given theme. They will provide reasons for the selection of those segments in the context of the given theme. They will provide details of the segmentation bases used in defining those segments.

Learners will then select one key customer segment and provide details and influences of the buying decision-making process relevant to that segment.

Links to other units

This unit links to:

- Unit 1: Marketing Principles
- Unit 6: Branding Products and Services
- Unit 7: Generating Customer Loyalty.

Employer involvement

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

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

Opportunities to develop transferable employability skills

Planning and time-management skills

Design and creativity skills

Presentation skills

Verbal and non-verbal communication skills.

Unit 3: Developing a Communications Plan

Level: 3

Unit type: Internal set assignment

Guided learning hours: 120

Unit in brief

Learners develop and use customer communications to engage with customers.

Unit introduction

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

In this unit, you will look at the processes involved in creating a successful customer communications plan. You will explore the purpose of marketing communications and the range of tools available. You will prepare a customer communications plan and measure the plan's effectiveness.

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

Assessment

This unit has a set assignment. Learners must complete a Pearson Set Assignment Brief.

Learning aims

In this unit you will:

- A** Investigate the customer communications process for a specific product or service
- B** Plan and create customer communications for a specific product or service
- C** Present customer communications for a specific product or service.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Investigate the customer communications process for a specific product or service	A1 The customer communications process A2 Factors involved in developing customer communications A3 Customer communications mix tools A4 Advantages and disadvantages of different customer communications tools	A customer communications plan that includes a portfolio of research and customer communications materials.
B Plan and create customer communications for a specific product or service	B1 Customer communications plan B2 Creating customer communications materials	
C Present customer communications for a specific product or service	C1 Presenting a customer communications plan C2 Measuring and evaluating the customer communications plan C3 Tools for measuring the effectiveness of the customer communications plan	A presentation of the customer communications plan, accompanied by an evaluation of the communications materials.

Content

Learning aim A: Investigate the customer communications process for a specific product or service

A1 The customer communications process

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

A2 Factors involved in developing customer communications

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

A3 Customer communications mix tools

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

A4 Advantages and disadvantages of different customer communications tools

- Above-the-line approaches:
 - advantages – reach, attention, brand building
 - disadvantages – cost, outdated, effectiveness and return on investment (ROI).
- Below-the-line approaches:
 - advantages – builds customer relationships, lower investment, direct reach to customers, targeted promotion, cost-effective, easy to measure, better ROI, easy to adapt, instant conversion

- disadvantages – targeting may be difficult, training requirements, deeper understanding of customers and clients needed, lack of trust, content of promotion needs to be localised.
- Online tools:
 - advantages – cost-effective, easy to connect all over the world, efficiency and productivity, competitive advantage, easy to map consumer behaviour
 - disadvantages – time-consuming, investments in software and hardware, lack of physical contact with customers.
- Offline tools:
 - advantages – choice, tangibility, tactility, interaction
 - disadvantages – not easily measured, costly, hard to establish yourself without online presence.

Learning aim B: Plan and create customer communications for a specific product or service

B1 Customer communications plan

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

B2 Creating customer communications materials

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

Learning aim C: Present customer communications for a specific product or service

C1 Presenting a customer communications plan

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

C2 Measuring and evaluating the customer communications plan

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

C3 Tools for measuring the effectiveness of the customer communications plan

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

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Investigate the customer communications process for a specific product or service		AB.D1 Develop a thorough communications plan and materials with effective use of relevant tools and processes for a specific product or service.
A.P1 Outline customer communications processes and development. A.P2 Research customer communications tools for a specific product or service.	A.M1 Compare relevant communications processes and tools for a specific product or service.	
Learning aim B: Plan and create customer communications for a specific product or service		
B.P3 Develop a communications plan that meets set objectives and includes an appropriate message and communications mix. B.P4 Develop communications materials that appropriately meet set objectives.	B.M2 Develop a detailed communications plan and materials informed by detailed assessment of objectives.	
Learning aim C: Present customer communications for a specific product or service		C.D2 Evaluate and reflect on the effectiveness of the professional, coherent communications plan, materials and presentation using audience feedback, making justified recommendations for improvement.
C.P5 Present a professional communications plan and materials to an audience using appropriate technical language and formatting. C.P6 Reflect on the communications plan, materials and presentation, suggesting improvements.	C.M3 Present a professional, well-organised communications plan and materials to an audience, selecting and using effective methods and content. C.M4 Reflect on the effectiveness of the communications plan, materials and presentation, suggesting recommendations.	

Essential information for assignments

This unit is assessed using a Pearson Set Assignment Brief. A set assignment must be used to assess learners.

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aims A and B

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

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

For Pass standard, learners will provide an overview of the customer communications development process stages for internal and external communications. They will research and identify some of the key tools available for developing communications for a specific product or service. They will develop a communication plan, with objectives and a message that are mostly relevant and logical. They will develop communications materials that meet the set objectives.

Learning aim C

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

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

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

Assessment controls

Time: this assignment has a recommended time period. This is for advice only and can be adjusted depending on the needs of learners.

Supervision: you should be confident of the authenticity of learner's work. This may mean that learners be supervised.

Resources: all learners should have access to the same types of resources to complete the assignment.

Research: learners should be given the opportunity to carry out research outside of the learning context if required for the assignment.

Links to other units

This unit links to:

- Unit 1: Marketing Principles
- Unit 6: Branding Products and Services
- Unit 7: Generating Customer Loyalty.

Employer involvement

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

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

Opportunities to develop transferable employability skills

Planning and time-management skills

Design and creativity skills

Presentation skills

Verbal and non-verbal communication skills.

Unit 4: Investigating Digital Marketing

Level: 3

Unit type: **Internal**

Guided learning hours: 60

Unit in brief

Learners select their own organisation to explore the use of digital marketing, how this has evolved over time and the different tools and content options that are used to target a key customer segment.

Unit introduction

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

In this unit, you will understand the key concepts associated with digital marketing, including the impact of digital marketing and the effects on customers and the effective use of digital marketing tools and content.

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

Learning aims

In this unit you will:

- A** Explore the evolving nature of marketing activities over time
- B** Explore the use of digital marketing tools to target key customer segments
- C** Review different content options for the development of digital marketing tools.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Explore the evolving nature of marketing activities over time	A1 Principles of digital marketing A2 Evolution of digital techniques A3 Social media engagement with different customers A4 Digital technology changing customer behaviour	Report evaluating the impact of evolving digital technology and social media on marketing activities, including how this has changed the behaviour of the target key customer segment in a selected organisation.
B Explore the use of digital marketing tools to target key customer segments	B1 Digital marketing toolbox B2 How digital marketing tools can be used with a range of different customers	Report evaluating different content options, for use within the digital marketing tools, used to target a key customer segment in a selected organisation, justifying the selections.
C Review different content options for the development of digital marketing tools	C1 Different content options for digital marketing tools C2 Producing successful digital marketing content	

Content

Learning aim A: Explore the evolving nature of marketing activities over time

A1 Principles of digital marketing

- Choice of organisation
 - background including size, type, range of products and services, competitors, customer base, internal and external stakeholders and key customer segment.
- Integration with traditional marketing.
- Contribution to organisation goals, e.g.:
 - opportunities
 - online visibility
 - improving customer acquisition costs, and revenue
 - use of metrics, e.g. opens, shares and time on page.
- 7Ps: product, price, place, promotion, people, physical evidence and processes.
- Agile delivery:
 - what customers want and what competitors are doing change constantly
 - personalising delivery of the right message to the right people at the right time.
- Factors driving customer behaviour, e.g.:
 - improved technology
 - widespread access to the internet
 - cost to access.
- Legal and ethical issues in digital marketing, e.g.:
 - data protection legislation
 - safeguarding data
 - electronic communications regulations
 - deceptive marketing practices
 - accessibility.

A2 Evolution of digital techniques

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

- keyword analysis
- search marketing (SEM)
- pay per click (PPC)
- online advertising, such as display adverts on websites
- affiliate marketing
- referrals
- digital display advertising
- o purpose and functions of online marketing platforms, such as
 - online auction sites and third-party websites, comparison websites, intermediary websites, crowdfunding systems and crowdsourcing, review platforms, growth of online transactions, social media in customer buying and selling
- o website marketing
 - ecommerce and organisation websites
 - blogs, vlogs
 - dynamic content
 - pop-ups
 - live chat
- o email marketing
 - email newsletters.

A3 Social media engagement with different customers

- Customers' motivation for using social media platforms.
- Advantages and disadvantages of social media platforms.
- Use of social media platforms to communicate with customers.

A4 Digital technology changing customer behaviour

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

Learning aim B: Explore the use of digital marketing tools to target key customer segments

B1 Digital marketing toolbox

- Elements of the digital marketing toolbox including:
 - email
 - websites
 - online PR
 - search engine optimisation
 - blogs
 - social networks
 - online advertising.

B2 How digital marketing tools can be used with a range of different customers

- Advantages and disadvantages of digital marketing tools, e.g.:
 - online working and upskilling staff
 - cost
 - time
 - materials and resources, e.g. software and hardware
 - opportunities for automation
 - audience reach
 - response mechanisms legal and ethical considerations
 - legal and ethical considerations.
- Opportunities and threats of using digital tools.
- Use of the tools in different customer contexts to meet set objectives e.g.
 - business to business (B2B)
 - business to customer (B2C)
 - not for profit (NfP).

Learning aim C: Review different content options for the development of digital marketing tools

C1 Different content options for digital marketing tools

- Digital marketing content formats, e.g.:
 - text
 - images
 - animated GIFS
 - videos
 - sound.

C2 Producing successful digital marketing content

- Role of customer in content creation.
- User-generated content.
- Product reviews.
- Online feedback.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Explore the evolving nature of marketing activities over time		A.D1 Evaluate the impact of evolving digital technology and social media on marketing activities, including how this has changed the behaviour of the target key customer segment in a selected organisation.
A.P1 Explain how marketing activities have changed as a result of evolving digital technology over time in a selected organisation. A.P2 Describe how evolving digital technology, including social media, has changed the behaviour of the target key customer segment in a selected organisation.	A.M1 Assess the impact of evolving digital technology and social media, on marketing activities, including how this has changed the behaviour of the target key customer segment in a selected organisation.	
Learning aim B: Explore the use of digital marketing tools to target key customer segments		BC.D2 Evaluate different content options and the use of digital tools to target a key customer segment.
B.P3 Describe how digital marketing tools could be used to target a key customer segment in a selected organisation. B.P4 Describe the advantages and disadvantages of the digital marketing tools used to target a key customer segment in a selected organisation.	B.M2 Analyse how digital marketing tools could be used to target a key customer segment in a selected organisation.	
Learning aim C: Review different content options for the development of digital marketing tools		BC.D2 Evaluate different content options and the use of digital tools to target a key customer segment.
C.P5 Explain how different content options could be developed for use within the digital marketing tools used to target a key customer segment in a selected organisation. C.P6 Describe the steps involved in developing the different content options that could be used within the digital marketing tools used to target a key customer segment in a selected organisation.	C.M3 Assess the different content options, including the steps involved in developing these, for use within the digital marketing tools used to target a key customer segment in a selected organisation.	

Essential information for assignments

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

There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

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

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

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aim A

For Distinction standard, learners will consider various different impacts of evolving technologies and social media on the marketing activities of an organisation they have selected. This will include the advantages and disadvantages of the different evolving digital technologies and the social media for the organisation's marketing activities. Learners will come to a judgement supported by evidence which will often be in the form of a conclusion.

For Merit standard, learners will give careful consideration to the various different impacts that evolving digital technology and social media have on the marketing activities of an organisation of their choice and identify which are the most important or relevant. They will make a judgement on the importance of these impacts and come to a supported conclusion as to how this has changed the behaviour of the selected organisation's key customer segment.

For Pass standard, learners will give a background to their selected organisation including size, type, range of products and services, competitors, customer base, internal and external stakeholders and key customer segment. They will describe the different platforms available to the selected organisation and explain how marketing activities have changed due to evolving digital technology over time in an organisation of their choice and expand this with appropriate justifications. They will give a clear account of how the evolving digital technology, including social media, has changed the behaviour of the target key customer segment for their selected organisation.

Learning aims B and C

For Distinction standard, learners will consider the various content options for use within the digital marketing tools for their selected organisation as above that are used to target a key customer segment. They will consider the strengths and weaknesses of these content options and tools and come to a judgement supported by evidence, justifying the most appropriate selection, in the form of a conclusion.

For Merit standard, learners will give careful consideration to how the digital marketing tools could be used to target a selected key customer segment in their selected organisation, as above. They will identify which are the most relevant and make links to the steps involved in developing these different content options. They will consider different content options and make a judgement on the most appropriate content options for the key customer segment.

For Pass standard, learners will give an account of how at least three different digital marketing tools could be used to target a key customer segment in their selected organisation and a clear valid account of the advantages and disadvantages of the digital marketing tools used to target this key customer segment. They will identify and expand this to explain how at least two different content options could be developed for use within the digital marketing tools used to target a key customer segment in their selected organisation. They will give a clear account of the steps involved in developing the different content options that could be developed for use within the digital marketing tools used to target a key customer segment in their selected organisation

Links to other units

This unit links to:

- Unit 1: Marketing Principles
- Unit 12: Influencer Marketing.

Employer involvement

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

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

Opportunities to develop transferable employability skills

Planning and time-management skills

Design and creativity skills

Presentation skills

Verbal and non-verbal communication skills.

Unit 5: Developing a Digital Marketing Campaign

Level: 3

Unit type: Internal

Guided learning hours: 120

Unit in brief

Learners develop their own digital marketing campaign.

Unit introduction

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

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

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

Learning aims

In this unit you will:

- A** Plan and design a digital marketing campaign for a specific product or service
- B** Develop and test a digital marketing campaign for a specific product or service
- C** Review the development and effectiveness of a digital marketing campaign.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Plan and design a digital marketing campaign for a specific product or service	A1 Campaign outline A2 Type of campaign A3 Resources required A4 Content calendar A5 Design a campaign	A completed digital marketing plan and associated materials for a specific product or service
B Develop and test a digital marketing campaign for a specific product or service	B1 Create campaign materials B2 Use digital marketing content formats B3 Testing	A presentation of a digital marketing campaign that shows the types of digital content to be used by a selected organisation. The materials will be outlined in a content/marketing calendar.
C Review the development and effectiveness of a digital marketing campaign	C1 Reflection on the stages of the digital marketing campaign C2 Review of the production of the campaign materials	

Content

Learning aim A: Plan and design a digital marketing campaign for a specific product or service

A1 Campaign outline

- Purpose of the campaign.
- Objectives for campaign success.
- Audience and their digital marketing content needs and preferences.

A2 Type of campaign

- Email campaign to encourage downloads.
- Mini website for a new product.
- Pop-ups for an existing website to encourage conversion.
- Blog articles about new products, the organisation's background.
- Organic social media campaigns.
- Social media advertising.
- Online advertising.
- Stories to increase fans or followers.

A3 Resources required

- Software.
- Hardware.
- Content (text, images, video, sound).
- Budget required.
- People involved.
- Time in uploading content.
- Tools to schedule content.
- Monitoring feedback.

A4 Content calendar

- Timescale.
- Tools to use.
- When content will be posted.
- How content is posted (manual/automatic).

A5 Design a campaign

- Initial design ideas/prototypes (illustrating design principles) and the requirements for a digital marketing campaign:
 - diagrammatic illustrations, e.g. storyboard, mood board, wireframe, site maps
 - realistic representations
 - alternative design ideas/prototypes, including compatibility with mobile/tablet devices.
- Obtaining and using feedback from others to help refine alternative design ideas/prototypes and make decisions.

Learning aim B: Develop and test a digital marketing campaign for a specific product or service

B1 Create campaign materials

- Software – web authoring, blog/vlog writer, social media, email newsletters, pop ups.
- Hardware.
- Image/video manipulation and editing.
- Sourcing content.
- Identifying, organising and creating required materials.
- Refining materials, e.g. adding other details, reducing file size, optimising for different platforms
- Exporting and compression.

B2 Use digital marketing content formats:

- Messages.
- Words for blog posts.
- Website copy.
- Images.
- GIFs.
- Video.
- Sound.

B3 Testing and measuring

- Testing
 - functionality – does it work?
 - usability – is it easy to use?
 - compatibility – does it work on more than one device – phone/tablet/laptop?
 - marketing testing – A/B testing, multivariate.
- Measuring
 - purpose and types of digital metrics for measuring digital campaigns
 - assessing results against campaign objectives
 - methods of reporting results
 - managing and using campaign data
 - benefits to the organisation.

Learning aim C: Review the development and effectiveness of a digital marketing campaign

C1 Reflection on the stages of the digital marketing campaign

- Planning, design and development stages
 - criteria
 - marketing objectives
 - target audience
 - management
 - efficiency
 - comparison with competitors
 - use of technology
 - content
 - messaging
 - timing
 - budget.
- Testing and measuring
 - how these support future decision making.

C2 Review of the production of the campaign materials

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

Assessment criteria

Pass	Merit	Distinction	
Learning aim A: Plan and design a digital marketing campaign for a specific product or service			
<p>A.P1 Plan and design a digital marketing campaign for a specific product or service.</p> <p>A.P2 Plan a content calendar for a specific product or service.</p>	<p>A.M1 Plan and design a realistic digital marketing campaign and a sustained content calendar for a specific product or service that meets objectives.</p>	<p>A.D1 Plan and design a detailed digital marketing campaign for a specific product or service that meets set objectives.</p>	
Learning aim B: Develop and test a digital marketing campaign for a specific product or service			
<p>B.P3 Create materials for a digital marketing campaign using digital marketing tools for a specific product or service that meet set objectives.</p> <p>B.P4 Test a digital marketing campaign for a specific product or service that meet set objectives.</p>	<p>B.M2 Create realistic materials using a range of digital marketing tools and undertake a range of appropriate testing for a digital marketing campaign for a specific product or service that meets set objectives.</p>	<p>BC.D2 Create detailed materials using a range of digital marketing tools and undertake comprehensive testing, evaluating the effectiveness of the stages of the digital marketing campaign and the production of the campaign materials for a specific product or service.</p>	
Learning aim C: Review the development and effectiveness of a digital marketing campaign			
<p>C.P5 Reflect on the stages in the digital marketing campaign.</p> <p>C.P6 Review the production of the campaign materials.</p>	<p>C.M3 Assess the effectiveness of the stages of the digital marketing campaign and the production of the campaign materials for a specific product or service.</p>		

Essential information for assignments

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

There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

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

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

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aim A

For Distinction standard, learners will plan and design a detailed and well-developed digital marketing campaign. The plan will contain full coverage of the objectives, the audience and the resources. Learners will create a content calendar showing comprehensive planned activity to meet the objectives of the plan. There should be proficient use of appropriate technology.

For Merit standard, learners will plan and design a relevant and realistic digital marketing campaign that is appropriate to an audience. The plan will contain many of the objectives, the audience and the resources but may contain minor omissions. Learners will include a content calendar showing the planned activity to meet the objectives of the plan. There should be use of appropriate technology.

For Pass standard, learners will plan and design a digital marketing campaign. The plan will contain some of the main objectives, the audience and the resources but will give them only brief consideration. It will meet the basic needs of the campaign. Learners will include a complete content calendar, mostly in line with the plan. There should be use of technology in the development of the plan.

Learning aims B and C

For Distinction standard, learners will develop thorough and detailed campaign materials using at least three different digital marketing tools. All of the selected tools will be appropriate and effective in meeting the needs of the audience. They will use at least three testing methods and metrics and their selection of these methods and metrics will show a thorough understanding of the valuable data that the selected tests and metrics will provide. Learners will draw on varied information, considering the relevance or significance of each of the stages of the digital marketing campaign in equal depth. This will also include a detailed reflection of the ease and challenges that each of these stages presented to them and of the production of the campaign materials. Learners' enquiries should lead to a supported judgement showing a deep understanding of their audience and the set objectives. Learners will describe how metrics were used to measure the effectiveness of the digital communications plan against the objectives and support future decision making. They will arrive at a supported conclusion.

For Merit standard, learners will develop a relevant and realistic campaign appropriate to its purpose using at least three different digital marketing tools. They will also use at least three appropriate testing methods and metrics and these, along with the marketing tools, will be used to consider whether they meet the objectives of the campaign. Learners will present a careful consideration of the effectiveness of the stages of the digital marketing campaign and the production of the campaign materials, identifying which have been the most relevant at ensuring the campaign's effectiveness. They will arrive at a conclusion, supported by the results of their testing and metrics. Learners will describe how metrics were used to measure the effectiveness of the digital communications plan against the objectives and support future decision making.

For Pass standard, learners will develop campaign materials and test and measure these using a limited number of tools, metrics and tests. The choice of tests and metrics may be inappropriate for some types of campaign and the information and measures these tests gather will be basic but will meet some of the objectives.

Learners will produce a basic reflection that is relevant but will lack detail. Learners will cover all stages of the digital marketing campaign but may not reflect on each stage equally. Learners will describe how metrics were used to measure the effectiveness of the digital communications plan against the objectives and support future decision making.

Links to other units

This unit links to:

- Unit 1: Marketing Principles
- Unit 6: Branding Products and Services
- Unit 7: Generating Customer Loyalty.

Employer involvement

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

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

Opportunities to develop transferable employability skills

Planning and time-management skills

Design and creativity skills

Presentation skills

Verbal and non-verbal communication skills.

Unit 6: Branding Products and Services

Level: 3

Unit type: Internal set assignment

Guided learning hours: 60

Unit in brief

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

Unit introduction

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

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

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

Assessment

This unit has a set assignment. Learners must complete a Pearson Set Assignment Brief.

Learning aims

In this unit you will:

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

Summary of unit

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

Content

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

A1 Principles of branding

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

A2 Brand as an asset

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

A3 Benefits and limitations of branding

- Benefits of strong branding:
 - differentiates the product or service from the competition
 - increases customer engagement
 - increases customer loyalty and customer advocates
 - can command premium prices/higher prices than non-branded products or services

- reduces price sensitivity
- increases value of the organisation
- makes consumer choice and recognition of products or services easier
- strong brand awareness leads to high sales and high market share
- retailers and service sellers are more likely to stock top-selling brands than less well-known brands
- brand portfolios allow organisations to compete in many different marketplaces with a range of product lines or services.
- Limitations of branding:
 - may take years to build a brand
 - high cost of promotion, keeping brand in the customers' eyes
 - loss of brand value for one product or service can affect a range of similar products or services
 - brands invite competition and copycats
 - high cost of research and development in ensuring brand continues to develop and lead the market.

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

B1 Branding as part of organisation strategy

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

B2 Brand design

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

B3 Factors influencing branding activities

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

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

C1 Challenges of managing brands

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

C2 Improving a brand

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

Assessment criteria

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

Essential information for assignments

This unit is assessed using a Pearson Set Assignment Brief. A set assignment must be used to assess learners.

Further information for teachers and assessors

Resource requirements

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

Essential information for assessment decisions

Learning aim A

Learners will carry out an investigation into an organisation that has a reputation for strong brands. Learners will draw on the varied information from the given context in the Pearson Set Assignment and consider the relevance and significance of the unit coverage within that context. This will lead to a supported judgement and conclusion established within the given context.

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

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

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

Learning aims B and C

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

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

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

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

Assessment controls

Time: this assignment has a recommended time period. This is for advice only and can be adjusted depending on the needs of learners.

Supervision: you should be confident of the authenticity of learner's work. This may mean that learners be supervised.

Resources: all learners should have access to the same types of resources to complete the assignment.

Research: learners should be given the opportunity to carry out research outside of the learning context if required for the assignment.

Links to other units

This unit links to:

- Unit 1: Marketing Principles
- Unit 2: Investigating Customer Communications
- Unit 4: Investigating Digital Marketing
- Unit 7: Generating Customer Loyalty
- Unit 10: Customer Immersion Experiences
- Unit 11: Activating a Brand
- Unit 12: Influencer Marketing
- Unit 13: Market Research for a Start-up Business.

Employer involvement

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

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

Unit 7: Generating Customer Loyalty

Level: 3

Unit type: Internal set assignment

Guided learning hours: 60

Unit in brief

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

Unit introduction

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

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

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

Assessment

This unit has a set assignment. Learners must complete a Pearson Set Assignment Brief.

Learning aims

In this unit you will:

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

Summary of unit

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

Content

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

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

A1 Purposes of customer loyalty strategies

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

A2 Organisation benefits

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

A3 Customer benefits

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

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

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

B1 Gathering and using customer loyalty information

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

B2 Implementing relationship marketing strategies

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

B3 Customer loyalty strategies and the marketing mix

- Product: using mined data to customise products according to customer wishes.
- Price: 'made-to-measure' prices for customers.
- Place: offering a wide range of possibilities for the customer to get the product.
- Promotion: individual communication with customers.

- People: personal touch points with customers.
- Physical evidence: offline and online customer journey.
- Processes: simplicity of access to product or service.

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

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

C1 Key factors of generating customer loyalty

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

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

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

C3 Performance measurement

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

Assessment criteria

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

Essential information for assignments

This unit is assessed using a Pearson Set Assignment Brief. A set assignment must be used to assess learners.

Further information for teachers and assessors

Resource requirements

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

Essential information for assessment decisions

Learning aim A

Learners will draw on the varied information from the given context in the Pearson Set Assignment and consider the relevance and significance of the unit coverage within that context. This will lead to a supported judgement and conclusion established within the given context.

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

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

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

Learning aims B and C

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

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

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

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

Assessment controls

Time: this assignment has a recommended time period. This is for advice only and can be adjusted depending on the needs of learners.

Supervision: you should be confident of the authenticity of learner's work. This may mean that learners be supervised.

Resources: all learners should have access to the same types of resources to complete the assignment.

Research: learners should be given the opportunity to carry out research outside of the learning context if required for the assignment.

Links to other units

This unit links to:

- Unit 1: Marketing Principles
- Unit 2: Investigating Customer Communications
- Unit 3: Developing a Communications Plan
- Unit 4: Investigating Digital Marketing
- Unit 5: Developing a Digital Marketing Campaign
- Unit 6: Branding Products and Services
- Unit 10: Customer Immersion Experiences
- Unit 11: Activating a Brand
- Unit 12: Influencer Marketing
- Unit 13: Market Research for a Start-up Business.

Employer involvement

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

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

Unit 8: Corporate Social Responsibility

Level: 3

Unit type: Internal set assignment

Guided learning hours: 60

Unit in brief

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

Unit introduction

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

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

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

Assessment

This unit has a set assignment. Learners must complete a Pearson Set Assignment Brief.

Learning aims

In this unit you will:

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

Summary of unit

Learning aim	Key content areas	Assessment approach
A Explore the CSR issues, initiatives and impacts facing organisations	A1 CSR and stakeholders A2 CSR issues A3 CSR initiatives A4 CSR impacts	A report evaluating a range of CSR issues, initiatives and impacts undertaken by organisations, including effect on their stakeholders. The report should also include the benefits, limitations and competitive advantage of implementing CSR initiatives and of seeking recognition from external bodies.
B Explore benefits and limitations for an organisation of implementing CSR initiatives	B1 Potential benefits of acting responsibly B2 Potential limitations from adopting a corporate socially responsible approach B3 The costs and benefits of seeking recognition from external bodies	
C Plan a CSR initiative for an organisation to address selected issues	C1 Researching CSR C2 Organisational areas of CSR C3 Planning a CSR initiative	A plan justifying the impact of the CSR initiative on stakeholders for a selected organisation that fully addresses a given brief and the issues faced.

Content

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

A1 CSR and stakeholders

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

A2 CSR issues

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

A3 CSR initiatives

- Environmental initiatives, e.g. carbon footprint reduction, waste reduction, recycling, sustainability of resources and materials.
- Ethical and legal initiatives, e.g. promoting diversity and inclusion in marketing materials and in workplace practices, transparency with clients and other stakeholders, e.g. labelling, proactive press releases, active in the community, responding to queries openly, transparency in financial matters.

- Supply chain initiatives, e.g. fair treatment and working conditions of employees of key suppliers, minimum/living wage for both own and suppliers' workforce, reducing the environmental impact of sourcing, logistics and distribution practices, ethical trading practices.
- Social initiatives, e.g. donating money, products or services to social causes, donating resources to charities and local community programmes, education, training and support for the community.

A4 CSR impacts

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

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

B1 Potential benefits of acting responsibly

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

B2 Potential limitations from adopting a corporate socially responsible approach

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

B3 The costs and benefits of seeking recognition from external bodies

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

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

C1 Researching CSR

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

C2 Organisational areas of CSR

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

C3 Planning a CSR initiative

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

Assessment criteria

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

Essential information for assignments

This unit is assessed using a Pearson Set Assignment Brief. A set assignment must be used to assess learners.

Further information for teachers and assessors

Resource requirements

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

Essential information for assessment decisions

Learners will draw on the varied information from the given context in the Pearson Set Assignment and consider the relevance and significance of the unit coverage within that context. This will lead to a supported judgement and conclusion established within the given context.

Learning aims A and B

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

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

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

Learning aim C

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

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

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

Assessment controls

Time: this assignment has a recommended time period. This is for advice only and can be adjusted depending on the needs of learners.

Supervision: you should be confident of the authenticity of learner's work. This may mean that learners be supervised.

Resources: all learners should have access to the same types of resources to complete the assignment.

Research: learners should be given the opportunity to carry out research outside of the learning context if required for the assignment.

Links to other units

This unit links to *Unit 15: International Business*.

Employer involvement

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

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

Unit 9: Marketing an Event

Level: 3

Unit type: Internal

Guided learning hours: 120

Unit in brief

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

Unit introduction

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

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

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

Learning aims

In this unit you will:

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

Summary of unit

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

Content

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

A1 Events, audiences and stakeholders

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

A2 Purpose and scope of marketing for events

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

A3 Principles of events marketing

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

A4 Marketing strategies for events

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

Learning aim B: Develop a marketing campaign to promote an event

B1 Research and feasibility

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

B2 Preparing a marketing campaign

- Rationale of the campaign and event.
- Aims and objectives of the marketing campaign.
- Key performance indicators.
- Research and analysis:
 - primary, e.g. surveys, questionnaires, focus groups
 - secondary, e.g. reports and studies done by government agencies, trade associations or other organisations in the industry.

- Situational analysis:
 - SWOT (strengths, weaknesses, opportunities, threats)
 - PESTLE (political, economic, social, technological, legal and environmental)
 - Porter's Five Forces.
- Event image and branding.
- Budgeting.
- Timelines for campaign, including monitoring and milestones.

B3 Creating marketing media

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

Learning aim C: Market and promote an event for a given audience

C1 Marketing implementation

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

C2 Audience touchpoints

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

C3 Post-event marketing

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

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

D1 Evaluation of the marketing of an event

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

D2 Critical success factors in marketing for events

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

D3 Suggestions for improvements

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

Assessment criteria

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

Essential information for assignments

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

There is a maximum number of three summative assignments for this unit.

The relationship of the learning aims and criteria is:

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

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

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

Further information for teachers and assessors

Resource requirements

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

Essential information for assessment decisions

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

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

Learning aim A

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

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

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

Learning aim B

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

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

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

Learning aims C and D

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

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

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

Links to other units

This unit links to *Unit 10: Customer Immersion Experience*.

Employer involvement

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

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

Unit 10: Customer Immersion Experiences

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

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

Unit introduction

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

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

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

Learning aims

In this unit you will:

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

Summary of unit

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

Content

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

A1 Purpose of customer experiences as marketing tools

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

A2 Experiential marketing strategies

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

A3 Immersion experiences in customer experience events

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

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

B1 Research, feasibility and success factors

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

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

B2 Creating a customer experience plan

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

B3 Contingency, emergency planning and risk management

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

B4 Management of the customer experience

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

B5 Gathering feedback

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

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

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

C2 Suggestions for improvements

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

Assessment criteria

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

Essential information for assignments

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

There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

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

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

Further information for teachers and assessors

Resource requirements

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

Essential information for assessment decisions

Learning aim A

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

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

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

Learning aims B and C

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

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

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

Links to other units

This unit links to *Unit 9: Marketing an Event*.

Employer involvement

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

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

Unit 11: Activating a Brand

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

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

Unit introduction

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

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

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

Learning aims

In this unit you will:

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

Summary of unit

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

Content

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

A1 Organisation needs for brand activation

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

A2 Spaces for brand activation

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

A3 Brand activation techniques

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

A4 Communication practice in brand activation

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

A5 Legal, safety and ethical considerations

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

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

B1 Design development

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

B2 Media and materials

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

B3 Production techniques and processes

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

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

C1 Testing and feedback

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

C2 Reflection of development and production

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

C3 Evaluative factors

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

Assessment criteria

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

Essential information for assignments

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

There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

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

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

Further information for teachers and assessors

Resource requirements

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

Essential information for assessment decisions

Learning aim A

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

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

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

Learning aims B and C

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

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

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

Links to other units

This unit links to *Unit 7: Generating Customer Loyalty*.

Employer involvement

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

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

Unit 12: Influencer Marketing

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

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

Unit introduction

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

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

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

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

Learning aims

In this unit you will:

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

Summary of unit

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

Content

Learning aim A: Investigate influencers and their associated marketing campaigns

A1 Types of influencers and influencer requirements

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

A2 Types of influencer marketing campaigns

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

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

B1 Objectives of influencer marketing

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

B2 Legal and ethical considerations

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

B3 Assessing an influencer marketing campaign

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

Learning aim C: Develop an influencer marketing plan for a specific organisation**C1 The influencer marketing plan**

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

C2 Preparing a brief for the influencer

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

Assessment criteria

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

Essential information for assignments

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

There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

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

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

Further information for teachers and assessors

Resource requirements

There are no specific additional requirements for this unit.

Essential information for assessment decisions

Learning aim A

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

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

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

Learning aims B and C

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

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

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

Links to other units

This unit links to:

- Unit 4: Investigating Digital Marketing
- Unit 5: Developing a Digital Marketing Campaign.

Employer involvement

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

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

Unit 13: Market Research for a Start-up Business

Level: 3

Unit type: **Internal**

Guided learning hours: 60

Unit in brief

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

Unit introduction

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

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

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

Learning aims

In this unit you will:

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

Summary of unit

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

Content

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

A1 Purpose of market research

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

A2 Marketing objectives

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

A3 Types of research

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

A3 Appropriateness of choice of research

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

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

B1 Planning stage

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

B2 Market research activities

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

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

C1 Statistical analysis and interpretation of primary and secondary research

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

C2 Presentation of research results

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

C3 Value of the information

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

Assessment criteria

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

Essential information for assignments

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

There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

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

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

Further information for teachers and assessors

Resource requirements

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

Essential information for assessment decisions

Learning aim A

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

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

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

Learning aims B and C

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

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

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

Links to other units

This unit links with all other units in the specification.

Employer involvement

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

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

Unit 14: Digital Analytics

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

Learners explore the use of digital analytics in a business.

Unit introduction

Organisations of all sizes have long used data and statistics to look for patterns and trends in their markets and customer behaviour. The rapid development of technology and computing power has made digital analytics not just possible but necessary to organisations that want to systematically analyse data to improve business performance. As computing power becomes more affordable and cloud-based platforms more prevalent, more businesses, small and large, can collect, store and analyse data at scale. As such the importance of digital analytics has increased and many organisations recruit and create roles specifically for data analysts and data scientists who use digital analytics as their main tool. Digital analytics includes the collection, analysis, visualisation and interpretation of digital data to aid the decision-making process of businesses.

In this unit, you will explore the use and importance of digital analytics, learn the different types of digital analytics used by businesses, understand the role of market research, data collection and analysis and the legal and ethical considerations in using digital analytics.

You will develop a digital analytics plan, understanding the difference between and being able to select from a variety of digital information, media channels and devices. You will then review the success of digital marketing activity using appropriate market research and digital analytics measures and tools. To complete the assessment task, you will need to draw on your learning from across your programme of study.

This unit is suitable for those who are already working in the marketing industry and looking to progress to the specialised area of digital analytics, and for those looking to progress their career opportunities to the next level. The unit will help learners to progress their careers by giving them sound knowledge of digital analytics.

Learning aims

In this unit you will:

- A** Explore the purpose, importance and types of digital analytics and the legal and ethical considerations of using digital analytics
- B** Develop a plan for digital analytics using a variety of sources including market research, digital information, media, channels, and devices
- C** Review the success of digital marketing using appropriate data analysis techniques and digital analytics measurements.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Explore the purpose, importance and types of digital analytics and the legal and ethical considerations of using digital analytics	A1 Purpose and importance of digital analytics A2 Types of digital analytics A3 Challenges in digital analytics A4 Legal and ethical issues affecting digital analytics	Case study on the digital analytics used by a selected organisation, including an analysis of the types of digital analytics used and the considerations of digital data collection and analysis in that context.
B Develop a plan for digital analytics using a variety of sources including market research, digital information, media, channels, and devices	B1 Sources of digital information B2 Digital media B3 Market research	A completed plan with associated materials.
C Review the success of digital marketing using appropriate data analysis techniques and digital analytics measurements	C1 Measuring the success of digital marketing activities C2 Data analysis tools C3 Digital analytics metrics	A presentation of the digital analytics used from a given data set to assess and evaluate the success of a digital marketing campaign and make recommendations.

Content

Learning aim A: Explore the purpose, importance and types of digital analytics and the legal and ethical considerations of using digital analytics

A1 Purpose and importance of digital analytics

- Purpose of digital analytics:
 - understanding the customer
 - improve customer experience
 - engage new audiences
 - convert audience into customers
 - updating of content
 - targeted marketing
 - identification of gaps in markets
 - planning campaigns
 - quantify ROI from digital marketing campaign
 - marketing channel performance
 - measure traffic vs conversions
 - competitor analysis.
- Importance of digital analytics:
 - growth of big data
 - increased access and usage of the internet
 - number of users
 - demand for information
 - technology-enabled services
 - use of mobile technologies
 - faster decision making
 - cost reduction
 - competitor behaviour.

A2 Types of digital analytics

- Descriptive analytics
 - what happened?
- Diagnostic analytics
 - why did it happen?
- Predictive analytics
 - what will happen?
- Prescriptive analytics
 - how can I make something happen?

A3 Challenges in digital analytics

- Challenges:
 - data collection and availability
 - timeliness of data
 - data integrity
 - avoidance of bias
 - web and other digital algorithms changing
 - digital platforms becoming obsolete
 - new digital platforms being introduced
 - handling large data volumes.

A4 Legal and ethical issues affecting digital analytics

- Legal issues:
 - data protection
 - privacy and data collection
 - security and storage of customer information.
- Ethical issues:
 - opt-in/opt-out procedures
 - permissions
 - tracking customer behaviour.

Learning aim B: Develop a plan for digital analytics using a variety of sources including market research, digital information, media, channels, and devices

B1 Sources of digital information

- Digital information sources and search results:
 - customer reviews
 - social media
 - following conversations
 - interactions with social media
 - comparison websites (aggregators)
 - company websites
 - statistics sites
 - e-journals
 - web crawlers
 - quality scores.

B2 Digital media

- Paid media – organisations pay to deliver content to an audience:
 - paid search advertisements (ads)
 - social media ads
 - sponsorships
 - display/banner ads.
- Earned media – organisations try to earn coverage and exposure from reporters and influencers:
 - viral marketing
 - social media conversations
 - blog/vlogs
 - user-generated reviews.
- Owned media – under the direct control of the organisation:
 - websites/mobile sites
 - newsletters
 - catalogues
 - blogs
 - email lists
 - applications (apps) and software.

B3 Market research

- Quantitative and qualitative market research data used to identify:
 - market size, structure, and trends
 - competitors and their activities
 - possible market segments
 - possible gaps in the market
 - consumer/buyer behaviour
 - customer satisfaction.
- Primary digital sources:
 - web analytics
 - keyword research
 - social media
 - digital surveys/questionnaires/polls
 - interviews
 - focus groups
 - blog comments.
- Secondary digital sources:
 - data companies
 - newspapers
 - reports/e-journals
 - official statistics
 - professional bodies
 - industry, sector, and market reports
 - government data/reports
 - online reviews.

Learning aim C: Review the success of digital marketing using appropriate data analysis techniques and digital analytics measurements**C1 Measuring the success of digital marketing activities**

- Measurable outcomes:
 - problem identification
 - measurement identification
 - Key Performance Indicators (KPIs)
 - benchmarking
 - internal
 - external.
- Reasons for measuring the success of activities:
 - refinement and adaptation of marketing activities
 - branding
 - content management
 - lead generation
 - ecommerce
 - customer satisfaction and engagement
 - segmentation
 - budget allocation
 - continual improvement process
 - A/B testing.

C2 Data analysis tools

- Tools used to collect, analyse, and present measures of success:
 - dashboards
 - aggregators
 - web analytics
 - marketing data sets
 - spreadsheet software.
- Basic statistical techniques:
 - measures of location (averages)
 - mean
 - mode
 - median
 - measures of spread
 - range
 - interquartile range (IQR)
 - variance and standard deviation
 - correlation and regression.
- Data visualisation and presentation:
 - graphical and tabular presentation
 - time series data
 - cross-sectional data
 - scatter diagrams
 - regression lines
 - data skewness.

C3 Digital analytics metrics

- Key metrics:
 - website
 - macro conversions
 - micro conversions
 - conversion rate
 - hit rate/visits (total)
 - unique visitors
 - bounce rate
 - exit rate
 - dwell time (stickiness)
 - click-through rate
 - download rates
 - visitor origin (country/region)
 - visitor source (channel/platform)
 - time of day
 - top page views
 - pages per visit (PPV)

- emails
 - open rates
 - bounce backs
 - unsubscribes
 - times opened
 - read rate
- social media
 - views
 - shares
 - followers
 - times a hashtag is used
 - emoticons
 - Daily Active Users (DAU).

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Explore the purpose, importance and types of digital analytics and the legal and ethical considerations of using digital analytics		A.D1 Evaluate the purpose and importance of digital analytics to a business commenting on the practical and legal considerations to the business of using digital analytics.
A.P1 Describe the purpose and importance of digital analytics for businesses. A.P2 Explain the different types of digital analytics used in businesses.	A.M1 Assess how digital analytics can be used to help inform the decision-making process for businesses.	
Learning aim B: Develop a plan for digital analytics using a variety of sources including market research, digital information, media, channels, and devices		B.D2 Produce a comprehensive plan, with well-developed reasoning, discussing the sources of data and information that can be analysed for a selected business.
B.P3 Produce a basic plan describing the sources of data that can be collected for a business.	B.M2 Produce a detailed plan giving, with reasons, the sources of data that could be collected for a selected business.	
Learning aim C: Review the success of digital marketing using appropriate data analysis techniques and digital analytics measurements		C.D3 Evaluate the success of a digital marketing campaign using appropriate data analysis and digital analytics against performance measures and criteria and give recommendations for improvement.
C.P4 Select appropriate digital analytics that can be used to analyse a given data set. C.P5 Explain appropriate data analysis techniques to measure the success of digital marketing.	C.M3 Analyse the given data using appropriate data analysis techniques and digital analytics to measure the success of digital marketing.	

Essential information for assignments

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

There is a maximum number of three summative assignments for this unit.

The relationship of the learning aims and criteria is:

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

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

Learning aim: C (C.P4, C.P5, C.M3, C.D3)

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Learning aim A

For Distinction standard, learners will be able to evaluate information relating to a business requiring the use of digital analytics. Learners will be able to explain what types of digital analytics are appropriate in a given context, find examples of those analytics in the given context, and analyse how the use of those analytics can help the decision-making process for the business, giving some justification for their choice. Learners will also be able to comment on the technical challenges faced by the business as well as the possible legal and ethical considerations that could arise because of the use of digital analytics in the given context.

Overall, the evidence will be well structured, with use of appropriate technical language (including definitions), and will demonstrate high-quality written/oral communication. There should be reasoned justification for the importance of digital analytics. Some parts of the evidence may be considered in greater depth than others.

For Merit standard, learners will carry out an assessment of how digital analytics can be used to help inform the decision-making process for the business they have researched. There should be some explanation as to the different types of digital analytics that can be used and consideration of the technical challenges faced by the business as well as possible legal and ethical considerations.

Overall, the evidence will be well structured, with some use of appropriate technical language (including definitions), although there may be some inaccuracies with terms used. There should be a good quality of written/oral communication demonstrated. Some parts of the evidence may be considered in greater depth than others.

For Pass standard, learners will describe the purpose and importance of digital analytics for businesses, ensuring that they have researched at least one suitable business or business area. Learners will also explain the different types of analytics used in a business or different businesses, giving some reasons for their use to aid the decision-making process. There should be some reference to the challenges faced and/or the legal and ethical considerations of the use of digital analytics in business. Overall, the evidence will be well structured, with some use of appropriate technical language (including definitions), although there may be some inaccuracies with terms used. Some parts of the evidence may be considered in greater depth than others.

Learning aim B

For Distinction standard, learners will produce a detailed, comprehensive plan of the sources of data to be analysed for a selected business. There should be well-reasoned justification for the choice of data with detailed explanation relevant to the selected business. The data should come from a variety of sources including primary and secondary market research, digital information, media, channels, and devices.

Overall, the evidence will be well structured, with use of appropriate technical language (including definitions), and will demonstrate high-quality written/oral communication. There should be reasoned justification given for the choice of data sources to be analysed for the selected business.

For Merit standard, learners will produce a detailed plan giving the sources of data that can be used for digital analytics for a business they have researched. Detailed and valid reasons should be given for their choice of those sources. The data should be chosen from a variety of different sources that can include market research, digital information, media, channels, and devices.

The evidence will be well structured demonstrating a good quality of written and/or oral communication. There should be good use of appropriate technical language (including definitions), although there may be some inaccuracies with terms used. Some parts of the evidence may be considered in greater depth than others.

For Pass standard, learners will produce an explanation of the sources of data that can be used for digital analytics for a business they have researched. A number of sources should be described.

Overall, the evidence will be well structured, with some use of appropriate technical language (including definitions), although there may be some inaccuracies with terms used. Some parts of the evidence may be considered in greater depth than others.

Learning aim C

For Distinction standard, learners will provide evidence of the selection and evaluation of appropriate data analysis and digital analytics techniques used to measure the success of digital marketing based on the given data set. A full and well-reasoned justification for the selection of tools should be provided along with explanation of the success criteria being measured. Data analysis should include clear and detailed statistical techniques with a clear description of their purpose. Appropriate digital analytics should be selected, justified reasons for their selection given and relevance to the measurement of success of digital marketing in the context of the data set.

The evidence will be well structured demonstrating a high level of written and/or oral communication. Data presentation should be appropriate to the level of audience. There should be good use of appropriate technical language (including definitions) and data analysis techniques will be highly accurate although there may be some errors in calculation. Learners should perform analyses using appropriate data analysis tools including spreadsheet software or equivalent for statistical calculations. Some parts of the evidence may be considered in greater depth than others.

For Merit standard, learners will select and analyse appropriate data analysis and digital analytics techniques to measure the success of digital marketing based on the given data set. Data analysis should include some statistical techniques with a clear description of their purpose. Appropriate digital analytics should be selected, again with a clear description of the reason for their selection and relevance to the measurement of success of digital marketing in the context of the data set.

The evidence will be well structured demonstrating a good quality of written and/or oral communication. There should be good use of appropriate technical language (including definitions), although there may be some inaccuracies with terms used. Data analysis techniques will be mostly accurate although there may be some errors in calculation. Learners should perform analyses using appropriate data analysis tools including spreadsheet software or equivalent for statistical calculations. Some parts of the evidence may be considered in greater depth than others.

For Pass standard, learners will select and explain with reasons appropriate data analysis and digital analytics techniques that can be used to measure the success of digital marketing based on the given data set. Some basic data analysis should be performed including the use of statistical techniques as well as some digital analytics. Overall, the evidence will be well structured, with some use of appropriate technical language (including definitions), although there may be some inaccuracies with terms used. Data analysis techniques will be mostly accurate although there may be some errors in calculation. Learners can perform analyses using paper-based calculation in appropriate detail or using some basic functions in a spreadsheet or other data analysis tool. Some parts of the evidence may be considered in greater depth than others.

Links to other units

This unit links to:

- Unit 1: Marketing Principles
- Unit 4: Investigating Digital Marketing
- Unit 5: Developing a Digital Marketing Campaign
- Unit 13: Market Research for a Start-up Business.

Opportunities to develop transferable employability skills

In completing this unit, learners will have the opportunity to develop a number of transferable employability skills including:

- analytical and decision-making skills
- formal written and oral communication skills
- data analysis skills including the use of basic statistical techniques to analyse data
- knowledge of digital analytics from web, email and other digital sources
- selection of appropriate software tools to aid in the analysis of data.

Unit 15: International Business

Level: 3

Unit type: **Internal**

Guided learning hours: 60

Unit in brief

Learners explore the reasons why businesses trade globally and consider the factors that influence the implementation of international business strategies.

Unit introduction

International business has a significant influence on a nation's economy. It takes place in a globally competitive environment, involving organisations of all types and sizes. Organisations engaged in international business activities need to take into account a number of factors, such as the culture and politics of the country with which they want to do business. Governments can influence international business to maximise the benefits to the national economy and countries join international trading blocs to promote and protect international business.

In this unit, you will explore the benefits and issues associated with international business activities. You will investigate the economic and wider external environments that influence the choice of international markets. You will also examine the strategic and operational approaches to developing business in an international context. To complete the assessment task within this unit, you will need to draw on your learning from across your programme of study.

This unit will give you a greater understanding of the global business environment to help inform your career choices. The unit gives you the skills to undertake advanced or specialist studies in international business at higher education level.

Learning aims

In this unit you will:

- A** Examine the influences on the growth of globalisation
- B** Explore the structure of the global economy
- C** Examine strategic and operational approaches to developing international business.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Examine the influences on the growth of globalisation	A1 Globalisation A2 Factors influencing globalisation	A critical review of the current factors impacting the development and growth of international business.
B Explore the structure of the global economy	B1 International trading associations B2 The finance of international trade B3 Barriers to international business B4 Exchange rates	A case study investigation of an international business organisation, examining current and potential strategies.
C Examine strategic and operational approaches to developing international business	C1 Strategic aims and objectives C2 External influences C3 Operational implications	

Content

Learning aim A: Examine the influences on the growth of globalisation

A1 Globalisation

- The features and benefits of international trade, including imports and exports, international specialisation, increased standard of living; wider variety of goods available; technology transfer; the impact of international specialisation; creation of employment opportunities; international cooperation between countries.
- Features of globalisation, including the growth of trading blocs and their purpose, the growth of international transport systems, the international mobility of labour, international currency exchange and the impact of the growth of technology on business communications.
- The challenges of globalisation, including the economic and political influence of major international businesses, population movements; the increase in protectionist economic policies.

A2 Factors influencing globalisation

The influence of business organisations on the growth of the global economy.

- Reasons for conducting business internationally:
 - growth and diversification
 - access to new markets
 - additional revenue streams, increasing market share
 - brand exploitation
 - market leadership
 - technological dominance
 - gain comparative advantage
 - generate efficiency savings arising from internal economies of scale
 - external economies of scale
 - preferential tax rates or government incentives.
- Characteristics, advantages and disadvantages of international markets, e.g. developed economies, emerging markets, less developed economies.
- Factors influencing the choice of market, e.g. type of product, operating costs, size of market, political stability, regulatory.
- Characteristics and features of organisations and agencies involved in international business:
 - exporting organisations
 - importing organisations
 - multinational organisations
 - associated organisations, e.g. logistics and marketing
 - government agencies providing support and advice to international businesses.

Learning aim B: Explore the structure of the global economy

B1 International trading associations

Purpose and features of associations and trading arrangements in international business.

- World Trade Organization (WTO).
- Customs unions and common markets, e.g. European Union (EU), Mercosur (common market of South American nations), Eurasian Economic Union (EAEU).
- Free-trade areas such as USMCA (the United States-Mexico-Canada Agreement, which is to replace the North American Free Trade Area), ASEAN-Australia-New Zealand Free Trade Area (AANZFTA).

B2 The finance of international trade

- Methods of financing international trade, e.g. cash in advance, letters of credit, open account, consignment, international credit cards, international bank transfers, commercial payment systems.
- Agencies that support international business, e.g. banks, chambers of commerce, regional advisory organisations.
- Government support for international businesses, e.g. trade delegations, export finance advisers, trade fairs, identifying international partners, grants for international promotions.

B3 Barriers to international business

Factors that impact the growth of international business.

- Protectionism in international markets, e.g. to protect infant industries, to protect employment/local business.
- Features of the methods for protecting markets and their impact on the volume and value of international business, e.g. tariffs, customs duties, currency restrictions, quotas, subsidies.
- Features of the barriers to trade, e.g. trade restrictions, exchange rate volatility, legal and regulatory systems, financial requirements, operating risks, economic sanctions, political pressures.

B4 Exchange rates

- The factors influencing a country's exchange rate, e.g. inflation, interest rates, public debt, terms of trade, political stability, economic policies.
- Impact of currency rate fluctuations on a country and individual export and import businesses.

Learning aim C: Examine strategic and operational approaches to developing international business

C1 Strategic aims and objectives

- Factors that can influence the determination of business strategy for large and small businesses using SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis.
- Strategic aims and objectives of international businesses at different stages in their development, including market opportunities, profitability, growth, costs, efficiency, diversification, to increase shareholder value, corporate social responsibility.

- Factors influencing the strategic direction of small and large business organisations, e.g. the speed of establishing operations, access to local business knowledge and expertise, cost control, risk control, growth potential.
- Strategies for operating internationally, e.g. subsidiary businesses, joint ventures, partnerships, agencies, licensing, franchising, subcontracting and outsourcing.

C2 External influences

- STEEPLE analysis of factors that influence the external environment in which business organisations operate:
 - social and cultural, e.g. language, social structures, religion, values and attitudes to work
 - technological, e.g. reverse innovation for less developed economies
 - economic, e.g. tax rate on profits
 - environmental, e.g. regulations on sustainability and recycling
 - political, e.g. stability of political systems in a country
 - legal and regulatory, e.g. intellectual property rights, corporate governance regulation
 - ethical factors, e.g. equal pay, workforce health and safety.

C3 Operational implications

- Factors to take into account when implementing an international business strategy, including costs, expertise required, risk appetite of owner, contribution of the functional areas, including sales and marketing, finance, human resources, production/operations, administration, research and development.
- Re-engineering products and services to meet the demands and preferences of international markets, e.g. manufacturing vehicles to take account of emission regulations in different countries, reverse innovation.

Assessment criteria

Pass	Merit	Distinction
Learning aim A: Examine the influences on the growth of globalisation		A.D1 Evaluate the importance of factors influencing the global economy and the impact of globalisation on the national economies of contrasting countries.
A.P1 Explain the importance of factors influencing the global economy. A.P2 Explain the impact of globalisation on the national economies of contrasting countries.	A.M1 Analyse the importance of factors influencing the global economy and the impact of globalisation on the national economies of contrasting countries.	
Learning aim B: Explore the structure of the global economy		B.D2 Evaluate the impact of trading associations and trading barriers on an international trading organisation.
B.P3 Explain the impact of trading associations on an international business organisation. B.P4 Explain the impact of trading barriers on an international business organisation.	B.M2 Analyse the impact of trading associations and trading barriers on an international trading organisation.	
Learning aim C: Examine strategic and operational approaches to developing international business		C.D3 Justify own recommendations for the future strategic direction of an international business organisation.
C.P5 Explain the current strategic approach of an international business organisation. C.P6 Explain reasons for own recommendations for the future strategic direction of an international business organisation.	C.M3 Analyse the current strategic international approach of a business organisation. CM.4 Analyse the future strategic direction of an international business organisation, with rationale for own recommendations.	

Essential information for assignments

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

There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

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

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

Further information for teachers and assessors

Resource requirements

For this unit, learners must have access to current business information, for example from websites and printed resources.

Essential information for assessment decisions

Learning aim A

For Distinction standard, learners must produce a comprehensive report that explores both the positive and negative factors that influence the growth or reduction in scale of business activities that take place in the global economy. Learners must clearly distinguish between those factors that impact the global economy as a whole and those whose impact is primarily on specific market sectors or individual countries. Learners will show an in-depth understanding of the influences on each of the factors they have identified and the risks and opportunities they afford to business organisations operating in the global economy. For example, learners could show how the global economy is influenced by political and economic decisions taken by major international trading countries, whereas other specific factors may impact on certain market sectors such as cars or technology, which, in turn, could impact those countries that specialise in the production of goods and services focused on these market sectors. Learners will use data and market trends to support their conclusions, for example the volume and value of international trade, the volume and value of imports and exports of specific countries as well as economic performance indicators in these countries, including trends in economic growth and employment data. Learners will provide a wide range of examples to illustrate their ideas, which will be thoroughly detailed and accurate.

For Merit standard, learners must produce a well-reasoned report that explores in detail the positive and negative factors that impact on the growth or reduction of business activities that take place in the global economy. Learners will use a range of data sources to support the conclusions drawn in their report. For example, this data could be extracted from economic performance data of the global economy as a whole or the economic performance data of some of the main trading blocs, as well as data on those countries specialising in key market sectors. This data could include economic growth statistics and employment statistics. Learners will draw relevant conclusions, including the potential risks and opportunities for businesses operating, or seeking to operate, in the global economy and provide a range of examples to illustrate their conclusions, which will be detailed and accurate.

For Pass standard, learners must produce a report that identifies the main features of globalisation and highlights some of the main contributory factors affecting the growth or reduction of the global economy. Learners will review the relative influence of most of the factors that influence the development and growth of the global economy and how these factors have stimulated the development and growth of international trade between countries. Learners will include some economic and business data related to the global economy as a whole and to specific countries or market sectors to support their conclusions, which will be generally accurate, but may be generic and lacking in detail.

Learning aims B and C

For Distinction standard, learners must produce a comprehensive case study on a self-selected international business organisation. They must clearly identify how the business organisation's mission and core values have been translated into its business strategy in relation to its overseas business operations and activities. This could include research data drawn from publications such as the business organisation's Annual Report, with the case study including information such as the countries in which the business is based referenced against the trading blocs to which these countries are associated. Quantitative data could include the number of employees in each country and the relative size and importance of the business different international markets. Learners must conduct a comprehensive environmental analysis using STEEPLE and SWOT analysis, which, coupled with their other research findings, is used as the basis for a set of realistic recommendations for the future strategic direction of the business organisation. Learners will produce a robust rationale and risk analysis that justify the business case for the recommendations.

For Merit standard, learners must produce a detailed case study on a self-selected international business organisation. The case study will clearly show how the organisation's mission and core values, as well as the existence of international trading blocs, have influenced its strategic direction and associated operational business decisions and practices. For example, a business may have chosen to locate one of its major manufacturing plants in a specific country that belongs to a trading bloc in order to gain access to additional markets or it could have been attracted to a country whose working population has particular skills or characteristics. Learners must incorporate the results of their research into a detailed environmental analysis, using STEEPLE and SWOT analysis, which provides the basis for a set of realistic recommendations for the future strategic direction of the business organisation. For example, they may choose to support their recommendations by suggesting a series of SMART business targets against which the proposed recommendations could be assessed. These should be clearly referenced against the mission of the business and include an overview of the business risks involved in implementing the recommendations.

For Pass standard, learners must show a general understanding of how the business practices and operations of an international business organisation have been implemented to drive forward its mission and business strategy. Learners will provide an overview of the impact of international trading associations such as trading blocs on the organisation's decisions relating to aspects such as its location and main markets, and how the activities of the business organisation can be affected by barriers to international trade such as tariffs, quotas and subsidies. For example, learners could show how a business has focused its trading activities in those countries belonging to a free trade area or a customs union in order to take advantage of low tariffs and quotas. Learners will conduct a basic environmental analysis using STEEPLE and SWOT analysis, the outcome of which will be used to provide a set of recommendations that are general in nature and supported by a basic risk assessment and rationale.

Links to other units

This unit links to:

- Unit 3: Developing a Communications Plan
- Unit 5: Developing a Digital Marketing Campaign
- Unit 13: Market Research for a Start-up Business.

Opportunities to develop transferable employability skills

In completing this unit, learners will have the opportunity to develop investigation and analysis skills.

4 Planning your programme

How do I choose the right BTEC International Level 3 qualification for my learners?

BTEC International Level 3 qualifications come in a range of sizes, each with a specific purpose. You will need to recruit learners very carefully to ensure that they start on the right size of qualification to fit into their study programme and that they take the right pathways or optional units to allow them to progress to the next stage.

Some learners may want to take a number of complementary qualifications or keep their progression options open. These learners may be suited to taking a BTEC International Level 3 Certificate or Subsidiary Diploma. Learners who then decide to continue with a fuller vocational programme can transfer to a BTEC International Level 3 Diploma or Extended Diploma.

Some learners are sure of the sector in which they wish to work and are aiming for progression into that sector via higher education. These learners should be directed to the two-year BTEC International Level 3 Extended Diploma as the most suitable qualification.

Is there a learner entry requirement?

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

Learners are most likely to succeed if they have:

- five International GCSEs at good grades and/or
- BTEC qualification(s) at Level 2
- other appropriate qualifications or achievement at year 11 or age 16 in core subjects.

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

If learners are studying in English we recommend that they have attained at least Level B2 in the Common European Framework of Reference for Languages.

Please see resources available from Pearson at www.pearson.com/english

What is involved in becoming an approved centre?

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

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

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

What resources are required to deliver these qualifications?

As part of your centre approval, you will need to show that the necessary material resources and work spaces are available to deliver BTEC International Level 3 qualifications. For some units, specific resources are required.

How can Pearson Progress help with planning for these qualifications?

Pearson Progress is a digital support system that supports the delivery, assessment and quality assurance of BTECs in centres. It supports teachers with activities such as course creation, creating and verifying assignments and creating assessment plans and recording assessment decisions.

For further information, see *Section 10 Resources and support*.

Which modes of delivery can be used for these qualifications?

You are free to deliver BTEC International Level 3 qualifications using any form of delivery that meets the needs of your learners. We recommend making use of a wide variety of modes, including direct instruction in classrooms or work environments, investigative and practical work, group and peer work, private study and e-learning.

What are the recommendations for employer involvement?

BTEC International Level 3 qualifications are vocational qualifications and, as an approved centre, you are encouraged to work with employers on design, delivery and assessment to ensure that they are engaging and relevant, and that they equip learners for progression. There are suggestions in many of the units about how employers could become involved in delivery and/or assessment but these are not intended to be exhaustive and there will be other possibilities at local level.

What support is available?

We provide a wealth of support materials, including curriculum plans, delivery guides, sample Pearson Set Assignments, authorised assignment briefs and examples of marked learner work.

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

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

Meeting local needs

Centres should note that the qualifications set out in this specification have been developed in consultation with centres and employers for the relevant sector. Centres should make maximum use of the choice available to them within the optional units to meet the needs of their learners, and local skills and training needs.

In certain circumstances, units in this specification might not allow centres to meet a local need. In this situation, Pearson will allow centres to either make use of units from other BTEC specifications in this suite, or commission new units to meet the need. Centre developed units will need to be quality assured by Pearson at a cost. Centres are required to ensure that the coherence and purpose of the qualification is retained and to ensure that the vocational focus is not diluted.

The proportion of imported or locally developed units that can be used is as follows. These units cannot be used at the expense of the mandatory units in any qualification.

Qualification	Meeting local needs allowance	Unit equivalence
Certificate (180 GLH)	No MLN allowed	0 units
Subsidiary Diploma (360 GLH)	60 GLH MLN allowed	1 * 60 GLH unit
Foundation Diploma (540 GLH)	120 GLH MLN allowed	e.g. 2 * 60 GLH units
Diploma (720 GLH)	180 GLH MLN allowed	e.g. 3 * 60 GLH units
Extended Diploma (1080 GLH)	240 GLH MLN allowed	e.g. 4 * 60 GLH units

How will my learners become more employable through these qualifications?

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

5 Assessment structure

Introduction

BTEC International Level 3 qualifications are assessed using a combination of *internal assessments*, which are set and marked by teachers, and *Pearson Set Assignments*, which are set by Pearson and marked by teachers.

- Mandatory units have a combination of internal and Pearson Set Assignments.
- All optional units are internally assessed.

In developing an overall plan for delivery and assessment for the programme, you will need to consider the order in which you deliver units, whether delivery is over short- or long periods and when assessment can take place. Some units are defined as synoptic units (see *Section 2 Structure*). Normally, a synoptic assessment is one that a learner would take later in a programme and in which they will be expected to apply learning from a range of units. You must plan the assignments so that learners can demonstrate learning from across their programme.

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

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

Internal assessment

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

Pearson Set Assignment units

A summary of the set assignments for this qualification is given in *Section 2 Structure*. You should check this information carefully, together with the details of the unit being assessed, so that you can timetable learning and assessment periods appropriately.

Learners must take the authorised Pearson Set Assignment for the set assignment unit. Teachers are not permitted to create their own assessments for set assignment units. Some assignments may need to be taken in controlled conditions. These are described in each unit.

Please see *Section 6* for resubmission and retaking regulations.

6 Internal assessment

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

For BTEC International Level 3 qualifications, it is important that you can meet the expectations of stakeholders and the needs of learners by providing a programme that is practical and applied. Centres can tailor programmes to meet local needs and use links with local employers and the wider vocational sector.

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

All units in these qualifications are internally assessed but Pearson sets assignments for some units.

Principles of internal assessment (applies to all units)

Assessment through assignments

For all units, the format of assessment is an assignment taken after the content of the unit, or part of the unit if several assignments are used, has been delivered.

An assignment may take a variety of forms, including practical and written types.

An assignment is a distinct activity, completed independently by learners, that is separate from teaching, practice, exploration and other activities that learners complete with direction from teachers.

An assignment is issued to learners as an assignment brief with a defined start date, a completion date and clear requirements for the evidence that they need to provide. There may be specific observed practical components during the assignment period.

Assignments can be divided into tasks and may require several forms of evidence.

A valid assignment will enable a clear and formal assessment outcome, based on the assessment criteria. For most units, teachers will set the assignments. For Pearson Set Assignment units, Pearson will set the assignment.

Assessment decisions through applying unit-based criteria

Assessment decisions for BTEC International Level 3 qualifications are based on the specific criteria given in each unit and set at each grade level. To ensure that standards are consistent in the qualification and across the suite as a whole, the criteria for each unit have been defined according to a framework. The way in which individual units are written provides a balance of assessment of understanding, practical skills and vocational attributes appropriate to the purpose of qualifications.

The assessment criteria for a unit are hierarchical and holistic. For example, if an M criterion requires the learner to show 'analysis' and the related P criterion requires the learner to 'explain', then to satisfy the M criterion, a learner will need to cover both 'explain' and 'analyse'. The unit assessment grid shows the relationships between the criteria so that assessors can apply all the criteria to the learner's evidence at the same time. In *Appendix 2: Glossary of terms used*, we have set out a definition of terms that assessors need to understand.

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

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

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

The assessment team

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

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

Effective organisation

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

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

Learner preparation

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

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

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

Making valid assessment decisions

Authenticity of learner work

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

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

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

Assessors must complete a declaration that:

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

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

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

Making assessment decisions using criteria

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

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

- the *Essential information for assessment decisions* section in each unit gives examples and definitions related to terms used in the criteria
- the explanation of key terms in *Appendix 2: Glossary of terms used*
- examples of assessed work provided by Pearson
- your Lead IV and assessment team's collective experience, supported by the standardisation materials we provide.

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

Issuing assessment decisions and feedback

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

The information given to the learner:

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

Planning and record keeping

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

The programme must have an assessment plan validated by the Lead IV, produced as a spreadsheet. When producing a plan, the assessment team needs to consider:

- the time required for training and standardisation of the assessment team
- the time available to undertake teaching and carry out assessment, taking account of when learners may complete assessments and when quality assurance will take place
- the completion dates for different assignments and the name of each Assessor
- who is acting as the Internal Verifier for each assignment and the date by which the assignment needs to be internally verified

- setting an approach to sampling assessor decisions through internal verification that covers all assignments, assessors and a range of assessment decisions
- how to manage the assessment and verification of learners' work so that they can be given formal decisions promptly
- how resubmission opportunities can be scheduled.

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

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

There are examples of records and further information in the *BTEC International Quality Assurance Handbook*.

Setting effective assignments (applies to all units without Pearson set assignments)

Setting the number and structure of assignments

This section does not apply to set assignment units. In setting your assignments, you need to work with the structure of assignments shown in the *Essential information for assignments* section of a unit. This shows the structure of the learning aims and criteria that you must follow and the recommended number of assignments that you should use. For these units we provide sample authorised assignment briefs and we give you suggestions on how to create suitable assignments. You can find these materials on our website. In designing your own assignment briefs, you should bear in mind the following points.

- The number of assignments for a unit must not exceed the number shown in *Essential information for assignments*. However, you may choose to combine assignments, for example, to create a single assignment for the whole unit.
- You may also choose to combine all or parts of different units into single assignments, provided that all units and all their associated learning aims are fully addressed in the programme overall. If you choose to take this approach, you need to make sure that learners are fully prepared so that they can provide all the required evidence for assessment and that you are able to track achievement in the records.
- A learning aim must always be assessed as a whole and must not be split into two or more tasks.
- The assignment must be targeted to the learning aims but the learning aims and their associated criteria are not tasks in themselves. Criteria are expressed in terms of the outcome shown in the evidence.
- For units containing synoptic assessment, the planned assignments must allow learners to select and apply their learning, using appropriate self-management of tasks.
- You do not have to follow the order of the learning aims of a unit in setting assignments but later learning aims often require learners to apply the content of earlier learning aims and they may require learners to draw their learning together.

- Assignments must be structured to allow learners to demonstrate the full range of achievement at all grade levels. Learners need to be treated fairly by being given the opportunity to achieve a higher grade if they have the ability.
- As assignments provide a final assessment, they will draw on the specified range of teaching content for the learning aims. The specified content is compulsory. The evidence for assessment need not cover every aspect of the teaching content as learners will normally be given particular examples, case studies or contexts in their assignments. For example, if a learner is carrying out one practical performance, or an investigation of one organisation, then they will address all the relevant range of content that applies in that instance.

Providing an assignment brief

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

An assignment brief should have:

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

Forms of evidence

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

Full definitions of types of assessment are given in *Appendix 2: Glossary of terms used*.

These are some of the main types of assessment:

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

The form(s) of evidence selected must:

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

For example, when you are using performance evidence, you need to think about how supporting evidence can be captured through recordings, photographs or task sheets. Centres need to take particular care that learners are enabled to produce independent work. For example, if learners are asked to use real examples, then best practice would be to encourage them to use their own or to give the group a number of examples that can be used in varied combinations.

Late completion, resubmission and retakes (applies to all units including Pearson set assignment units)

Dealing with late completion of assignments for internally-assessed units

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

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

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

Resubmission of improved evidence for internally-assessed units

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

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

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

Once an assessment decision has been given to the learner, the resubmission opportunity must have a deadline within 15 working days after the timely issue of assessment feedback to learners, which is within term time in the same academic year.

A resubmission opportunity must not be provided where learners:

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

We recognise that there are circumstances where the resubmission period may fall outside of the 15-day limit owing to a lack of resources being available, for example, where learners may need to access a performance space or have access to specialist equipment. Where it is practical to do so, for example, evaluations, presentations, extended writing, resubmission must remain within the normal 15-day period.

Retake of internal assessment

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

The Lead Internal Verifier must authorise a retake of an assignment only in exceptional circumstances where they believe it is necessary, appropriate and fair to do so.

The retake is not timebound and the assignment can be attempted by the learner on a date agreed between the Lead IV and assessor within the same academic year.

For further information on offering a retake opportunity, you should refer to the *BTEC Centre Guide to Internal Assessment*. Information on writing assignments for retakes is given on our website (www.btec.co.uk/keydocuments).

7 Administrative arrangements

Introduction

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

Learner registration and entry

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

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

Access to assessment

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

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

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

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

Administrative arrangements for assessment

Records

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

Reasonable adjustments to assessment

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

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

Special consideration

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

Appeals against assessment

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

Conducting set assignments

Centres must make arrangements for the secure delivery of Pearson Set Assignments. At least one Pearson Set Assignment will be available each year for each unit with an additional one provided for resit. Centres must not select an assignment that learners have attempted already.

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

Medium control

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

Low control

These are activities completed without direct supervision. They may include research, preparation of materials and practice.

Each set assignment unit will contain instructions in the *Essential information for assignments* section on how to conduct the assessment of that unit.

Some set assignments will need to be taken with limited controls. Limited controls are described in each unit and may include the following conditions:

- Time: each assignment has a recommended time period. This is for advice only and can be adjusted depending on the needs of learners.
- Supervision: you should be confident of the authenticity of learner's work. This may mean that learners be supervised.
- Resources: all learners should have access to the same types of resources to complete the assignment.
- Research: learners should be given the opportunity to carry out research outside of the learning context if required for the assignment.

Schools and colleges must be able to confirm that learner evidence is authentic.

Dealing with malpractice in assessment

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

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

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

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

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

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

Learner malpractice

Learner malpractice refers to any act by a learner that compromises or which seeks to compromise the process of assessment or which undermines the integrity of the qualifications or the validity of results/certificates.

Learner malpractice in examinations **must** be reported to Pearson using a *JCQ Form M1* (available at www.jcq.org.uk/exams-office/malpractice). The form should be emailed to Learnermalpractice@pearson.com. Please provide as much information and supporting documentation as possible. Note that the final decision regarding appropriate sanctions lies with Pearson.

Failure to report malpractice constitutes staff or centre malpractice.

Staff/centre malpractice

Staff and centre malpractice includes both deliberate malpractice and maladministration of our qualifications. As with learner malpractice, staff and centre malpractice is any act that compromises or which seeks to compromise the process of assessment, or which undermines the integrity of the qualifications or the validity of results/certificates.

All cases of suspected staff malpractice and maladministration **must** be reported immediately, before any investigation is undertaken by the centre, to Pearson on a *JCQ Form M2(a)* (available at www.jcq.org.uk/exams-office/malpractice).

The form, supporting documentation and as much information as possible should be emailed to pqsmalpractice@pearson.com. Note that the final decision regarding appropriate sanctions lies with Pearson.

Failure to report malpractice itself constitutes malpractice.

More-detailed guidance on malpractice can be found in the latest version of the document *JCQ General and vocational qualifications Suspected Malpractice in Examinations and Assessments*, available at www.jcq.org.uk/exams-office/malpractice.

Sanctions and appeals

Where malpractice is proven, we may impose sanctions or penalties.

Where learner malpractice is evidenced, penalties may be imposed such as:

- disqualification from the qualification
- being barred from registration for Pearson qualifications for a period of time.

If we are concerned about your centre's quality procedures, we may impose sanctions such as:

- working with you to create an improvement action plan
- requiring staff members to receive further training
- placing temporary blocks on your certificates
- placing temporary blocks on registration of learners
- debarring staff members or the centre from delivering Pearson qualifications
- suspending or withdrawing centre approval status.

The centre will be notified if any of these apply.

Pearson has established procedures for centres that are considering appeals against penalties and sanctions arising from malpractice. Appeals against a decision made by Pearson will normally be accepted only from Heads of Centres (on behalf of learners and/or members of staff) and from individual members (in respect of a decision taken against them personally). Further information on appeals can be found in our document *Enquiries and appeals about Pearson vocational qualifications and end point assessment policy*, which is on our website. In the initial stage of any aspect of malpractice, please notify the Investigations Team by email via pqsmalpractice@pearson.com, who will inform you of the next steps.

Certification and results

Once a learner has completed all the required components for a qualification, the centre can claim certification for the learner, provided that quality assurance has been successfully completed. For the relevant procedures, please refer to our *International Information Manual*. You can use the information provided on qualification grading to check overall qualification grades.

Changes to qualification requests

Where a learner who has taken a qualification wants to resit a unit to improve their qualification grade, you firstly need to decline their overall qualification grade. You may decline the grade before the certificate is issued.

Additional documents to support centre administration

As an approved centre, you must ensure that all staff delivering, assessing and administering the qualifications have access to the following documentation. These documents are reviewed annually and are reissued if updates are required.

- *BTEC International Quality Assurance Handbook*: this sets out how we will carry out quality assurance of standards and how you need to work with us to achieve successful outcomes.
- *International Information Manual*: this gives procedures for registering learners for qualifications, transferring registrations and claiming certificates.
- *Regulatory policies*: our regulatory policies are integral to our approach and explain how we meet internal and regulatory requirements. We review the regulated policies annually to ensure that they remain fit for purpose. Policies related to this qualification include:
 - adjustments for candidates with disabilities and learning difficulties, access arrangements and reasonable adjustments for general and vocational qualifications
 - age of learners
 - centre guidance for dealing with malpractice
 - recognition of prior learning and process.

This list is not exhaustive and a full list of our regulatory policies can be found on our website.

8 Quality assurance

Centre and qualification approval

As part of the approval process, your centre must make sure that the resource requirements listed below are in place before offering the qualification.

- Centres must have appropriate physical resources (for example equipment, IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification.
- Staff involved in the assessment process must have relevant expertise and/or occupational experience.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have in place appropriate health and safety policies relating to the use of equipment by learners.
- Centres must deliver the qualification in accordance with current equality and diversity legislation and/or regulations.
- Centres should refer to the *Further information for teachers and assessors* section in individual units to check for any specific resources required.

Continuing quality assurance and standards verification

On an annual basis, we produce the *BTEC International Quality Assurance Handbook*. It contains detailed guidance on the quality processes required to underpin robust assessment and internal verification.

The key principles of quality assurance are that:

- a centre delivering BTEC programmes must be an approved centre, and must have approval for the programmes or groups of programmes that it is delivering
- the centre agrees, as part of gaining approval, to abide by specific terms and conditions around the effective delivery and quality assurance of assessment; the centre must abide by these conditions throughout the period of delivery
- Pearson makes available to approved centres resources and processes that exemplify assessment and appropriate standards. Approved centres must use these to ensure that all staff delivering BTEC qualifications keep up to date with the guidance on assessment
- an approved centre must follow agreed protocols for standardisation of assessors and verifiers, for the planning, monitoring and recording of assessment processes, and for dealing with special circumstances, appeals and malpractice.

The approach of quality-assured assessment is through a partnership between an approved centre and Pearson. We will make sure that each centre follows best practice and employs appropriate technology to support quality-assurance processes, where practicable. We work to support centres and seek to make sure that our quality-assurance processes do not place undue bureaucratic processes on centres. We monitor and support centres in the effective operation of assessment and quality assurance.

The methods we use to do this for BTEC Level 3 include:

- making sure that all centres complete appropriate declarations at the time of approval
- undertaking approval visits to centres
- making sure that centres have effective teams of assessors and verifiers who are trained to undertake assessment
- assessment sampling and verification, through requested samples of assessments, completed assessed learner work and associated documentation
- an overarching review and assessment of a centre's strategy for delivering and quality assuring its BTEC programmes, for example, making sure that synoptic units are placed appropriately in the order of delivery of the programme.

Centres that do not fully address and maintain rigorous approaches to delivering, assessing and quality assurance cannot seek certification for individual programmes or for all BTEC Level 3 programmes. An approved centre must make certification claims only when authorised by us and strictly in accordance with requirements for reporting.

Centres that do not comply with remedial action plans may have their approval to deliver qualifications removed.

9 Understanding the qualification grade

Awarding and reporting for the qualification

This section explains the rules that we apply in awarding a qualification and in providing an overall qualification grade for each learner. It shows how all the qualifications in this sector are graded.

Eligibility for an award

In order to be awarded a qualification, a learner must complete all units, achieve a Pass or above in all mandatory units unless otherwise specified. Refer to the structure in *Section 2 Structure*.

To achieve any qualification grade, learners must:

- complete and have an outcome (D, M, P or U) for all units within a valid combination
- achieve the **required units at Pass or above** shown in *Section 2*, abiding by the minimum requirements in the compensation table below
- achieve the **minimum number of points** at a grade threshold.

It is the responsibility of a centre to ensure that a correct unit combination is adhered to. Learners who do not achieve the required minimum grade (P) in units shown in the structure will not achieve a qualification.

Learners who do not achieve sufficient points for a qualification or who do not achieve all the required units may be eligible to achieve a smaller qualification in the same suite, provided they have completed and achieved the correct combination of units and met the appropriate qualification grade points threshold.

Compensation table

Qualification	Compensation rule	Unit equivalence
Certificate (180 GLH)	No compensation allowed	0 units
Subsidiary Diploma (360 GLH)	Mandatory must be passed, 60 GLH only at U grade permitted from optional	1 * 60 GLH unit
Foundation Diploma (540 GLH)	Mandatory must be passed, 120 GLH only at U grade permitted from optional	e.g. 2 * 60 GLH units OR 1 * 120 GLH unit
Diploma (720 GLH)	Mandatory must be passed, 180 GLH only at U grade permitted from optional	e.g. 3 * 60 GLH units OR 1 * 60 GLH and 1 * 120 GLH unit
Extended Diploma (1080 GLH)	Mandatory must be passed, 180 GLH only at U grade permitted from optional	e.g. 3 * 60 GLH units OR 1 * 60 GLH and 1 * 120 GLH unit

Calculation of the qualification grade

The final grade awarded for a qualification represents an aggregation of a learner's performance across the qualification. As the qualification grade is an aggregate of the total performance, there is some element of compensation in that a higher performance in some units may be balanced by a lower outcome in others.

In the event that a learner achieves more than the required number of optional units, the mandatory units, along with the optional units with the highest grades, will be used to calculate the overall result, subject to the eligibility requirements for that particular qualification title.

BTEC International Level 3 qualifications are awarded at the grade ranges shown in the table below.

Qualification	Available grade range
Certificate, Subsidiary Diploma, Foundation Diploma	P to D*
Diploma	PP to D*D*
Extended Diploma	PPP to D*D*D*

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

Learners who do not meet the minimum requirements for a qualification grade to be awarded will be recorded as Unclassified (U) and will not be certificated. They may receive a Notification of Performance for individual units. The *International Information Manual* gives full information.

Points available for units

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

	60 GLH	120GLH
U	0	0
Pass	6	12
Merit	10	20
Distinction	16	32

Claiming the qualification grade

Subject to eligibility, Pearson will automatically calculate the qualification grade for your learners when the internal unit grades are submitted and the qualification claim is made. Learners will be awarded qualification grades for achieving the sufficient number of points within the ranges shown in the relevant *Calculation of qualification grade* table for the cohort.

Calculation of qualification grade

Applicable for registration from 1 November 2020.

Certificate		Subsidiary Diploma		Foundation Diploma		Diploma		Extended Diploma	
180 GLH		360 GLH		540 GLH		720 GLH		1080 GLH	
Grade	Points threshold	Grade	Points threshold	Grade	Points threshold	Grade	Points threshold	Grade	Points threshold
U	0	U	0	U	0	U	0	U	0
Pass	18	P	36	P	54	PP	72	PPP	108
						MP	88	MPP	124
								MMP	140
Merit	26	M	52	M	78	MM	104	MMM	156
						DM	124	DMM	176
								DDM	196
Distinction	42	D	74	D	108	DD	144	DDD	216
						D*D	162	D*DD	234
								D*D*D	252
Distinction*	48	D*	90	D*	138	D*D*	180	D*D*D*	270

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

Examples of grade calculations based on table applicable to registrations from November 2020

Example 1: Achievement of a Certificate with a P grade

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	Pass	12
Unit 2	60	Int	Merit	10
Totals	180		P	22

The learner has sufficient points for a P grade.

Example 2: Achievement of a Certificate with an M grade

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	Merit	20
Unit 2	60	Int	Merit	10
Totals	180		M	30

The learner has sufficient points for an M grade.

Example 3: An Unclassified result for a Certificate

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	U	0
Unit 2	60	Int	Distinction	16
Totals	180		U	16

The learner has a U in Unit 1.

The learner has insufficient points for a P grade and has not met the minimum requirement for a grade in Unit 1.

Examples of grade calculations based on table applicable to registrations from November 2020

Example 1: Achievement of a Subsidiary Diploma with a P grade

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	Pass	12
Unit 2	60	Int	Pass	6
Unit 3	120	Int Set	Merit	20
Unit 4	60	Int	Unclassified	0
Totals	360		P	38

The learner has achieved P or higher in Units 1, 2 and 3.

The learner has sufficient points for a P grade.

Example 2: Achievement of a Subsidiary Diploma with an M grade

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	Merit	20
Unit 2	60	Int	Pass	6
Unit 3	120	Int Set	Merit	20
Unit 4	60	Int	Pass	6
Totals	360		M	52

The learner has sufficient points for an M grade.

Example 3: An Unclassified Result for a Subsidiary Diploma

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	Distinction	32
Unit 2	60	Int	Merit	10
Unit 3	120	Int Set	Unclassified	0
Unit 4	60	Int	Distinction	16
Totals	360		U	58

The learner has a U in Unit 3.

The learner has sufficient points for an M grade but has not met the minimum requirement for a P or higher in Unit 3.

Examples of grade calculations based on table applicable to registrations from November 2020

Example 1: Achievement of a Foundation Diploma with a P grade

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	Pass	12
Unit 3	120	Int Set	Pass	12
Unit 4	60	Int	Unclassified	0
Unit 5	120	Int	Pass	20
Unit 6	60	Int Set	Pass	0
Unit 7	60	Int Set	Distinction	16
Totals	540		P	60

The learner has achieved P or higher in Units 1, 3, 6 and 7.

The learner has sufficient points for a P grade.

Example 2: Achievement of a Foundation Diploma with an M grade

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	Distinction	32
Unit 3	120	Int Set	Merit	20
Unit 4	60	Int	Pass	6
Unit 5	120	Int	Merit	20
Unit 6	60	Int Set	Distinction	16
Unit 7	60	Int Set	Merit	10
Totals	540		M	104

The learner has sufficient points for an M grade.

Example 3: An Unclassified result for a Foundation Diploma

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	Merit	20
Unit 3	120	Int Set	U	0
Unit 4	60	Int	Pass	6
Unit 5	120	Int	Merit	20
Unit 6	60	Int	Distinction	16
Unit 7	60	Int	Distinction	16
Totals	540		U	78

The learner has a U in Unit 3.

The learner has sufficient points for an M grade but has not met the minimum requirement for P or higher in Unit 3.

Examples of grade calculations based on table applicable to registrations from November 2020

Example 1: Achievement of a Diploma with a PP grade

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	Pass	12
Unit 2	60	Int	Pass	6
Unit 3	120	Int Set	Pass	12
Unit 4	60	Int	Pass	6
Unit 5	120	Int	Pass	12
Unit 6	60	Int Set	Distinction	16
Unit 7	60	Int Set	Pass	0
Unit 10	60	Int	Merit	10
Unit 12	60	Int	U	0
Totals	720		PP	74

The learner has achieved P or higher in Units 1,3,6 and 7.

The learner has sufficient points for a PP grade.

Example 2: An Unclassified result for a Diploma

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	U	0
Unit 2	60	Int	Merit	10
Unit 3	120	Int Set	U	0
Unit 4	60	Int	Pass	6
Unit 5	120	Int	Distinction	32
Unit 6	60	Int	Merit	10
Unit 7	60	Int	Pass	6
Unit 14	60	Int	Merit	10
Unit 15	60	Int	Pass	6
Totals	720		U	80

The learner has a U in Units 1 and 3.

The learner has sufficient points for a PP grade but has not met the minimum requirement for P or higher in Units 1 and 3.

Examples of grade calculations based on table applicable to registrations from November 2020

Example 1: Achievement of an Extended Diploma with a PPP grade

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	Pass	12
Unit 2	60	Int	Pass	6
Unit 3	120	Int Set	Pass	12
Unit 4	60	Int	Pass	6
Unit 5	120	Int	Pass	12
Unit 6	60	Int Set	Pass	6
Unit 7	60	Int Set	Pass	6
Unit 8	120	Int Set	Merit	20
Unit 9	60	Int	Pass	6
Unit 10	60	Int	Merit	10
Unit 11	60	Int	Pass	6
Unit 12	60	Int	Pass	6
Unit 13	60	Int	U	0
Unit 15	60	Int	Pass	6
Totals	1080		PPP	114

The learner has achieved P or higher in Units 1 to 8.

The learner has sufficient points for a PPP grade.

Example 2: Achievement of an Extended Diploma with a DDM grade

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	Merit	20
Unit 2	60	Int	Pass	6
Unit 3	120	Int Set	Distinction	20
Unit 4	60	Int	Merit	10
Unit 5	120	Int	Distinction	20
Unit 6	60	Int set	Distinction	16
Unit 7	60	Int set	Merit	10
Unit 8	120	Int set	Distinction	32
Unit 9	60	Int	Distinction	16
Unit 10	60	Int	Merit	10
Unit 11	60	Int	Merit	10
Unit 12	60	Int	Distinction	16
Unit 13	60	Int	Pass	6
Unit 14	60	Int	Pass	6
Totals	1080		DDM	198

The learner has achieved P or higher in Units 1, 3, 6, 7 and 8.

The learner has sufficient points for a DDM grade.

Example 3: An Unclassified result for an Extended Diploma

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	120	Int Set	Pass	12
Unit 2	60	Int	Merit	10
Unit 3	120	Int Set	Pass	12
Unit 4	60	Int	Merit	10
Unit 5	120	Int	Pass	12
Unit 6	60	Int Set	Merit	10
Unit 7	60	Int Set	Distinction	16
Unit 8	60	Int Set	Merit	10
Unit 9	120	Int	Unclassified	0
Unit 10	60	Int	Merit	10
Unit 11	60	Int	Unclassified	0
Unit 12	60	Int	Unclassified	0
Unit 13	60	Int	Unclassified	0
Unit 14	60	Int	Pass	6
Totals	1080		U	108

The learner has 300 GLH at U.

The learner has sufficient points for an PPP and has achieved P or higher for Units 1 to 8 but has not met the minimum requirement for 900 GLH at Pass or above.

10 Resources and support

Our aim is to give you a wealth of resources and support to enable you to deliver BTEC International Level 3 qualifications with confidence. You will find a list of resources to support teaching and learning, and professional development on our website.

Support for setting up your course and preparing to teach

Specification

The specification (for teaching from November 2020) gives you details of the administration of the qualifications and information on the units for the qualifications.

Pearson Progress

Pearson Progress is a new digital support system that helps you to manage the assessment and quality assurance of the Pearson BTEC International Level 3 Marketing qualifications. It supports delivery, assessment and quality assurance of BTECs in centres and supports teachers and students as follows:

- course creation
- creating and verifying assignments
- creating assessment plans and recording assessment decisions
- upload of assignment evidence
- tracking progress of every learner.

The system is accessible for teachers and learners so that both teachers and learners can track their progress.

Support for teaching and learning

Pearson Learning Services provides a range of engaging resources to support BTEC International Level 3 qualifications, these may include:

- delivery guides, which give you important advice on how to choose the right course for your learners and how to ensure you are fully prepared to deliver the course. They explain the key features of the BTEC International Level 3 Marketing qualifications, for example employer involvement and employability skills. They also cover guidance on assessment and quality assurance. The Guide tells you where you can find further support and gives detailed unit-by-unit delivery guidance. They include teaching tips and ideas, assessment preparation and suggestions for further resources.
- sample schemes of work are provided for each mandatory unit. These are available in Word™ format for ease of customisation.
- delivery plans that help you structure delivery of a qualification
- teacher resource packs developed by Pearson including materials and activities to fully support your teaching of units available on LearningHub
- digital resources across a range of mandatory and optional units that enable an immersive learning experience available on LearningHub.

LearningHub

Digital learning content for this programme will be available on the Pearson LearningHub. This online and mobile-optimised platform provides high-quality, bitesized digital content for an accessible, interactive learning experience.

<https://www.pearson.com/uk/web/learning-hub.html>

Teaching and learning resources are also available from a number of other publishers. Details of Pearson's own resources and of all endorsed resources can be found on our website.

Support for assessment

Sample assessment materials for internally-assessed units

For internal units assessed with a Pearson Set Assignment we will provide a sample assignment as an example of the form of assessment for the unit. For the remaining internally set units, we allow you to set your own assignments, according to your learners' preferences and to link with your local employment profile.

We provide a service in the form of Authorised Assignment Briefs and sample Pearson Set Assignments, which are approved by Pearson Standards Verifiers. They are available via our website.

Pearson English

Pearson provides a full range of support for English learning including diagnostics, qualifications and learning resources. Please see www.pearson.com/english

Training and support from Pearson

People to talk to

There are many people available to support you and give you advice and guidance on delivery of your BTEC International Level 3 qualifications. They include the following.

- Subject Advisors – available for all sectors. They understand all Pearson qualifications in their sector and can answer sector-specific queries on planning, teaching, learning and assessment.
- Standards Verifiers – they can support you with preparing your assignments, ensuring that your assessment plan is set up correctly, and support you in preparing learner work and providing quality assurance through sampling.
- Regional teams – they are regionally based and have a full overview of the BTEC qualifications and of the support and resources that Pearson provides. Regions often run network events.
- Customer Services – the ‘Support for You’ section of our website gives the different ways in which you can contact us for general queries. For specific queries, our service operators can direct you to the relevant person or department.

Training and professional development

Pearson provides a range of training and professional development events to support the introduction, delivery, assessment and administration of BTEC International Level 3 qualifications. These sector-specific events, developed and delivered by specialists, are available both face to face and online.

‘Getting Ready to Teach’

These events are designed to get teachers ready for delivery of the BTEC International Level 3 qualifications. They include an overview of qualification structures, planning and preparation for internal assessment, and quality assurance.

Teaching and learning

Beyond the ‘Getting Ready to Teach’ professional development events, there are opportunities for teachers to attend sector- and role-specific events. These events are designed to connect practice to theory; they provide teacher support and networking opportunities with delivery, learning and assessment methodology.

Details of our training and professional development programme can be found on our website.

Appendix 1: Transferable employability skills

The need for transferable skills

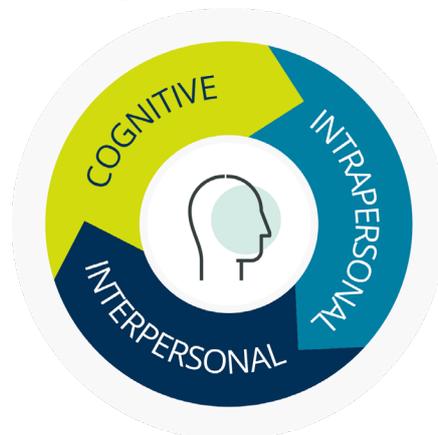
In recent years, higher-education institutions and employers have consistently flagged the need for learners to develop a range of transferable skills to enable them to respond with confidence to the demands of undergraduate study and the world of work.

The Organisation for Economic Co-operation and Development (OECD) defines skills, or competencies, as ‘the bundle of knowledge, attributes and capacities that can be learned and that enable individuals to successfully and consistently perform an activity or task and can be built upon and extended through learning.’^[1]

To support the design of our qualifications, the Pearson Research Team selected and evaluated seven global 21st-century skills frameworks. Following on from this process, we identified the National Research Council’s (NRC) framework^[2] as the most evidence-based and robust skills framework, and have used this as a basis for our adapted skills framework.

The framework includes cognitive, intrapersonal skills and interpersonal skills.

The NRC framework is included alongside literacy and numeracy skills.



The skills have been interpreted for this specification to ensure that they are appropriate for the subject. All of the skills listed are evident or accessible in the teaching, learning and/or assessment of the qualifications. Some skills are directly assessed. Pearson materials will support you in identifying these skills and in developing these skills in learners.

The table overleaf sets out the framework and gives an indication of the skills that can be found in marketing, it indicates the interpretation of the skills in this area. A full interpretation of each skill, with mapping to show opportunities for learner development, is given on the subject pages of our website: qualifications.pearson.com

¹ OECD – *Better Skills, Better Jobs, Better Lives* (OECD Publishing, 2012)

² Koenig, J. A. (2011) *Assessing 21st Century Skills: Summary of a Workshop* (National Academies Press, 2011)

Cognitive skills	Cognitive processes and strategies	Critical thinking Problem solving Analysis Reasoning/argumentation Interpretation Decision making Adaptive learning Executive function
	Creativity	Creativity Innovation
Intrapersonal skills	Intellectual openness	Adaptability Personal and social responsibility Continuous learning Intellectual interest and curiosity
	Work ethic/ conscientiousness	Initiative Self-direction Responsibility Perseverance Productivity Self-regulation (metacognition, forethought, reflection) Ethics Integrity
	Positive core self-evaluation	Self-monitoring/ self-evaluation/ self-reinforcement
Interpersonal skills	Teamwork and collaboration	Communication Collaboration Teamwork Cooperation Empathy/perspective taking Negotiation
	Leadership	Responsibility Assertive communication Self-presentation

Developing the ability to make a persuasive case in the fields of marketing or business enterprise and new technologies, supporting one or more arguments, including the ability to create a balanced and evaluated argument.

Taking responsibility for finding and correcting errors found in analysis of data from market research.

Advocating the position of another in an oral presentation or working together to create a persuasive argument to an audience or client.

Appendix 2: Glossary of terms used

This is a summary of the key terms used to define the requirements in the units.

Term	Definition
Analyse	<p>Learners present the outcome of methodical and detailed examination either:</p> <ul style="list-style-type: none"> • breaking down a theme, topic or situation in order to interpret and study the interrelationships between the parts and/or • of information or data to interpret and study key trends and interrelationships.
Assess	<p>Learners present a careful consideration of varied factors or events that apply to a specific situation or identify those which are the most important or relevant and arrive at a conclusion.</p>
Compare	<p>Learners identify the main factors relating to two or more items/situations or aspects of a subject and explain the similarities, differences, advantages and disadvantages. This is used to show depth of knowledge through selection of characteristics.</p>
Create	<p>Learners bring something into existence, e.g. itineraries, plans or proposals.</p>
Evaluate	<p>Learners draw on varied information, themes or concepts to consider aspects such as:</p> <ul style="list-style-type: none"> • strengths or weaknesses • advantages or disadvantages • alternative actions • relevance or significance. <p>Learners' enquiries should lead to a supported judgement showing relationship to its context. This will often be in a conclusion.</p>
Examine	<p>Learners select and apply knowledge to less familiar contexts.</p>
Explain	<p>Learners provide detail and reasons and/or evidence to support an opinion, view or argument.</p>

Term	Definition
Explore	Learners apply their skills and/or knowledge in contexts involving practical testing or trialling.
Interpret	Learners state the meaning, purpose or qualities of something through the use of images, words or other expressions.
Investigate	Learners' application of knowledge is based on personal research and development.
Justify	Learners give reasons or evidence to: <ul style="list-style-type: none"> • support an opinion, or • prove something right or reasonable.
Outline	Learners' work, performance or practice provides a summary, overview or brief description of something.
Participate	Learners take part in a practical activity in order to demonstrate knowledge and/or skills in relation to a specific task or context.
Plan	Learners create a way of carrying out a task or series of tasks to achieve specific requirements or objectives, showing progress from start to finish or progress within specified points in the task(s).
Prepare	Learners gather materials, information, techniques and/or procedures in readiness to undertake a process and/or make something ready for use.
Produce	Learners' knowledge, understanding and/or skills are applied to develop a particular type of evidence, for example a proposal, plan, product, service or report.
Research	Learners proactively seek information from primary and secondary sources.
Review	Learners make a formal assessment. They appraise existing information, or prior events, or reconsider information with the intention of making changes if necessary. This may or may not be in the context of own learning and skills development.
Understand	Learners demonstrate knowledge related to defined situations.

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