

Unit 2: Investigating Customer Communications

Delivery guidance

Approaching the unit

Customer communications is a key component in the overall marketing strategy on an organisation to engage customers. Organisations may have many different types 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, learners 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). Learners 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.

You should employ a wide variety of teaching and learning techniques in order to encourage the exploration of all aspects of customer communications. Learners will have opportunities to work independently and collaboratively, and will develop their skills of research, analysis, evaluative techniques and written and verbal communication. You can involve employers in the delivery of this unit if there are local opportunities to do so. Visits from guest speakers from different marketing roles, where learners can ask questions, will add interest as well as consolidate their learning.

Delivering the content areas

To support your learners' success in this unit your delivery must cover all content areas. You should develop your learners' ability to demonstrate their understanding of the content terms and language, applying their knowledge to a range of different organisations.

Content area A introduces learners to segmentation. This includes different types of customers, the purpose and methods of segmentation. It then goes on to explore why and how organisations target different segments and position their products and services.

Content area B focuses on customer buying decisions. It includes and exploration of stages in the decision-making process, as well as decision making in B2B and B2C contexts.

Content area C introduces different customer segments and bases for a selected communications plan. Learners explore the different purposes of a communications plan and investigate the segments that would be suitable targets.

Learners will use research skills extensively, supported by tutor input, to source relevant information on customer communications. There are numerous websites that give practical information into planning and creating communications. You should direct learners towards reliable information sources and suitable organisations and discourage them from using Wikipedia as a source of information. Your learners could use websites from a range of organisations within the public, private, voluntary and not-for-profit sectors, in order to establish



the characteristics of different types of customer communications and the effects on the buying decision making process.

You may find that your learners have ‘first-hand’ experience of different decision-making processes as customers, as well as being recipients of organisation communications, and these can be drawn on for learning activities. There are many useful video clips available on YouTube to provide a visual insight into the communications of many different types of organisations, and used selectively they can support and enhance delivery.

Educational visits and guest speakers can be a highly beneficial way of building a foundation for learners when conducting classroom-based research. It is possible to organise visits that do not incur too many costs, for example:

- a trip to a local marketing agency
- a visit to an in-house marketing department
- a visit to a web designer.

Many marketing organisations have employees who are willing to provide talks tailored to the needs of educational groups. A vast number of organisations also have a section of their website dedicated to educational resources, which can be accessed free of charge, and which can greatly enhance the learning experience.

Learners should be introduced to the wide range of technology used in the marketing industry. It would be beneficial for learners to develop an understanding of the rapid technological developments within the industry over recent years, as this impacts on marketing communication opportunities.

Some content areas in this unit overlap with other units in the qualification, for example Unit 1: Marketing Principles and Unit 2: Investigating Customer Communications. You could coordinate delivery to ensure the content of overlapping units are addressed in a complementary way, fully meeting the delivery requirements of the respective units, without undue repetition.

Assessment guidance

The assessment of this unit is through two assignments taken after learning aim A and B, then C. Authorised assignment briefs are available on the website, or alternatively, centres can adapt these or create their own to meet their needs of their learners. Where centres are adapting or creating their own, it is advisable that they utilise the free Assignment Checking Service to ensure that internal assessment requirements are being met.

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

An assignment is issued to learners as an assignment brief with a defined start date, a completion date and clear requirements for the evidence that they need to provide. There are specific practical components to this unit, for example in carrying out the presentation and this will require different forms of evidence, such as speaker notes, handouts, observation records or video recordings if available. A valid assignment will enable a clear and formal assessment outcome based on the assessment criteria.

Assessment decisions 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, the criteria for each unit have been defined according to a framework within the unit specification. This unit provides a balance of assessment of understanding, practical skills and vocational attributes appropriate to the purpose of the qualification.

The assessment criteria for the unit are hierarchical and holistic. For example, if an M criterion requires the learner to show 'analysis' and the related P criterion requires the learner to 'explain', then to satisfy the M criterion a learner will need to cover both 'explain' and 'analyse'. The unit assessment grid shows the relationships among the criteria so that assessors can apply all the criteria to the learner's evidence at the same time. In Appendix 1 Glossary of terms used for internally-assessed units, we have set out definitions of terms that assessors need to understand. Assessors must show how they have reached their decisions using the criteria in the assessment records. When a learner has completed all the assessment for a unit then the assessor will give a grade for the unit. This is given simply according to the highest level for which the learner is judged to have met all the criteria.

Therefore:

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



Getting started

**This gives you a starting place for one way of delivering the unit.
Activities are provided in preparation for the internal assessment.**

Unit 2: Investigating Customer Communications

Introduction

The delivery of this unit provides an opportunity for learners to understand the benefits to organisations of effective communications planning. They will gain knowledge of segmentation, targeting and positioning well as influences on the customer decision making process. Learning activities can include teacher and learner presentations, individual research and collaboratively learning activities in groups and pairs.

You could approach this unit in a number of ways. However, the unit has been structured to develop and build on underpinning knowledge. It is likely that once the underpinning knowledge and understanding have been addressed for each content area, learners are able to complete a formative assessment in preparation for the independent completion of the associated assignment brief.

While it is appreciated that much of the delivery of this unit will take place within the centre, there are numerous opportunities for employer engagement, e.g. through educational visits, the use of guest speakers, and the use of employees for example as a presentation audience, asking questions or giving feedback

Learners will require the use of IT facilities, including internet access for carrying out essential research and to cover all content areas independently, including the customer communication presentation.

Content area A: Explore segmentation, targeting and positioning.

- Content area A1 is designed to ensure that learners understand different types of customers in a range of organisation contexts, including B2C, B2B and NFP. They could carry out research into the differences between types of customers in a buying context, using examples. This could be then followed by activities in which learners reflect on themselves within the scope of customer definitions and share with the group.
- Content area A2 introduces learners to customer segments, including demographic, geographic and lifecycle. Visual learners would benefit from the use of video clips and graphs and collaborative activities could involve applying segments to a range of different products and services in different industries. Learners could explain their segment choices and give the advantages of each.
- Content area A3 includes the purpose of segmenting customers. Learners will understand the importance of matching organisational strengths to segments and this could be taught using different case studies. Content area A3 also offers the opportunity to investigate the benefits of segmentation to both customers and organisations, for example satisfying customer needs and lowering promotional costs. Alternatively, this could be a good opportunity to invite a marketing guest speaker to answer learner questions on segmentation.
- Learners will then go on to examine the bases of segmentation, covering B2B, B2C and NFP. For example, a manufacturer targeting equipment to small organisations, a retailer targeting clothing to social media users and a not -for -profit organisation targeting large fundraising capabilities.
- Content area A4 introduces targeting customers: concentrating marketing on a few segments whose needs match the product or service. This area covers the purpose as well as the methods of targeting used. Learners could carry out individual research into the methods used by a range of organisations to target segments, as a basis for a group discussion that also draws on their experience as targeted customers.
- Content area A5 introduces positioning: the ability to influence customer perception of a brand. This covers the purpose and methods of positioning. Learners could research definitions of positioning and discuss this in pairs. They could then research case study organisations that have established positioning marketing and explain the methods used.

Content area B: Understand how customers make buying decisions

- In Content area B1 learners are introduced to the various stages in the customer decision-making process, from recognising the need for a product to potentially becoming a repeat customer. Learners could carry out a collaborative ordering process exercise, using examples from organisation case studies as well as their own experience as customers.
- Learners are also introduced to decision making units (DMU's). Learners could research examples of DMU's in a B2B setting, from initiators to users. They could then compare this to decision making in a B2C setting and explain the differences between these two contexts.
- Content area B2 introduces influences on decision-making for both individuals and organisations. This includes influences such as purchasing power and marketing campaigns for individuals. On the other hand, organisations will be influenced by internal and external factors, such as budget limitations and the external environment. Learners could be presented with case-studies and encouraged to form judgments on the relative significance of influence for different organisations.
- Content area B2 also covers both online and offline influences on decision making and this is an opportunity for learners to research the wealth of information available. In pairs, learners could establish examples of products that are subject to influence, agree on the level of influence, then share this with the larger group.

Content area C: Explore different customer segments and bases for a selected communications plan

- Content area C1 introduces the communication plan, beginning with its purposes: acquisition, retention and new product launch. Learners could carry out research into the strategies that different organisations use to acquire new customers. In groups they could then compare this to strategies used for customer retention, explaining the comparison. Using this information, learners should be able to establish how effective communications can contribute towards new product launch.
- Content area C2 then covers the selection of suitable segments that are targeted in a organisation communications plan. This targeting will depend on several factors, from the nature of the organisation itself to its customer base and competition. For example, an outdoor activity organisation might choose a geographic segment for its communications plan, while a highly competitive organisation could focus communications on a particular age group. Learners should have the opportunity to explore and explain the reasons for different organisation selecting their segments.
- Content area C3 introduces the buying decision-making process for identified segments for a selected communications plan. This follows from C2, where learners have already selected suitable segments as targets for communication. Learners now need to investigate how segments go through different stages in the buying decision-making process. For example, the stage of evaluating product alternatives. C3 then covers influences on decision-making for these segments at these stages. For example the ease of using a website. Therefore, the communications plan would take into account website design for segments wanting to thoroughly compare products.

Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

This unit gives the foundation for learners to study all other units in marketing, including:

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

Textbooks

Bevan J, Coupland-Smith H, Dransfield R, Goymer J, Richards C (2010), Organisation Level 3 Book 1, Pearson (ISBN 9788120350588) – gives a useful introduction to communication terminology
Bovee C, Thill J Organisation Communication Today (2017) Pearson (ISBN-13 9780273761463) – gives useful chapters on planning and digital media
Egan, John (2019), Marketing Communications Sage Third Edition (ISBN 9781526446893)

Blogs

www.freshdesk.com - customer communication and engagement

www.hostpapa.co.uk - effective communication online

www.scripturaengage - why communication is crucial

Websites

www.smartinsights.com - segmentation targeting and positioning

www.yieldify.com - segmentation, targeting and positioning (STP)

www.yotpo.com - decision making process

www.mycustomer.com - B2B decision making

www.springfair.com - influencing factors on decision making

www.searchenginewatch.com - the influence of social media

www.forbes.com - when people are pressured to buy

www.tutor2U - internal and external influences on marketing

www.organisation2community.com - offline marketing

www.yokelloocal.com - 5 ways digital marketing helps organisation to grow

www.hullabaloo.co.uk - marketing communication top tips

Other resources

Plickers (<https://get.plickers.com>) is a SMART device app that promotes an imaginative way for tutors to complete formative assessments.

Pearson is not responsible for the content of any external internet sites. It is essential for tutors to preview each website before using it in class so as to ensure that the URL is still accurate, relevant and appropriate. We suggest that tutors bookmark useful websites and consider enabling learners to access them through the school/college intranet.