Pearson
BTEC

Pearson BTEC
International Level 3 Specialist Diploma in

International Event Management and Marketing Studies

L3

Specification

First teaching from September 2022

Issue 1

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Edexcel, BTEC and LCCI qualifications

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About Pearson

Pearson is the world's leading learning company, with 24,000 employees in more than 70 countries working to help people of all ages to make measurable progress in their lives through learning. We put the learner at the centre of everything we do, because wherever learning flourishes, so do people. Find out more about how we can help you and your learners at qualifications.pearson.com

Welcome

With a track record built over 40 years of learner success, our BTEC International qualifications are recognised internationally by governments, industry and higher education.

What are BTEC International Specialist and Professional qualifications?

These BTEC qualifications are available at Levels 1–3 (Specialist) and at Levels 4–7 (Professional).

BTEC International Specialist and Professional qualifications give learners the knowledge and/or skills that they need to prepare for employment in a sector or job role. They also provide career development opportunities for those already in work.

They put learning into the context of the world of work, giving learners the opportunity to apply their learning in relevant and realistic work contexts. This applied, practical approach means that learners develop the knowledge and skills they need for career progression or further study.

Sizes of qualification

Pearson estimates the number of guided learning hours (GLH) that will be needed for centre staff to deliver the qualification. This includes all training that involves centre staff in teaching and supervising learners, as well as all assessment activities.

BTEC Specialist and Professional qualifications are available in the following sizes:

- Award – a qualification with a GLH value of 10–120 hours
- Certificate – a qualification with a GLH value of 121–369 hours
- Diploma – a qualification with a GLH value of 370 or above.

Contents

Introduction to the Pearson BTEC International Level 3 Specialist Diploma in International Event Management and Marketing Studies

This specification contains all the information you need to deliver the Pearson BTEC International Level 3 Specialist Diploma in International Event Management and Marketing Studies.

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

This qualification is not regulated in England.

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

1 Qualification purpose and progression

Pearson BTEC International Level 3 Specialist Diploma in International Event Management and Marketing Studies

Who is this qualification for?

The Pearson BTEC International Level 3 Specialist Diploma in International Event Management and Marketing Studies is designed to provide focused and specialist vocational course in events and marketing with a clear international mindset. The qualification provides the knowledge, understanding and skills required to apply events and marketing skills and understanding to any sector.

The qualification develops a learner's abilities in events and marketing, allowing them to understand how business and marketing skills and understanding can be combined to host customers successfully from around the world.

What could this qualification lead to?

This qualification supports career progression. It can support learners intending to work in international events and/or events marketing and seeking to expand their use of global skills and understanding. There are no particular routes agreed for further education or employment.

How is this qualification assessed?

The qualification offers centres the opportunity to assess learners internally using Pearson Authorised Assignment Briefs or their own bespoke assessments to meet assessment criteria within each unit. There are no Pearson Set-Assignments for this qualification.

2 Qualification summary and key information

Qualification title	Pearson BTEC International Level 3 Specialist Diploma in International Event Management and Marketing Studies
Operational start date	01/09/2022
Entry requirements	This qualification is for learners aged 16 or above. There are no specific entry requirements; however, centres must ensure that learners have sufficient capacity and/or experiential learning to undertake this Level 3 qualification and be able to communicate fluently in English. Please also refer to *Section 7: Administrative Arrangements*.
Guided Learning Hours (GLH)	630
Assessment	The units are assessed using assignments that are set and marked by the centre.
Unit grading information	Pass/Merit/Distinction
Qualification grading information	Pass/Merit/Distinction

3 Structure

Qualification structure

Pearson BTEC International Level 3 Specialist Diploma in International Event Management and Marketing Studies

Learners will need to meet the requirements outlined in the table below before the qualification can be awarded.

Pearson BTEC International Level 3 Specialist Diploma in International Event Management and Marketing Studies		
Unit number	**Unit title**	**GLH**
Mandatory units – learners must achieve all units		
1	Managing an Event	**90**
2	Understanding Health, Safety and Security at Event Sites	**60**
3	Marketing an Event	**120**
4	Team Building in Business	**60**
5	Influencer Marketing	**60**
6	Digital Marketing	**60**
7	Creative Promotion	**60**
8	Pitching for a New Business	**60**
9	Business Ethics	**60**

4 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 specification. Where a specification has more than one qualification, numbers may not be sequential for all qualifications.
Unit title	This is the formal title that we always use, and it will appear on learners' certificates.
Level	All units and qualifications have a level assigned to them. The levels correspond with the levels used in the UK's Regulated Qualification Framework.
Unit type	This says if the unit is mandatory or optional for the qualification.
Guided Learning Hours (GLH)	Guided Learning Hours (GLH) is an estimate of the number of hours that will be needed for a typical learner to achieve the unit. Guided learning includes all training that involve centre staff in teaching and supervising learners, as well as all assessment activities.
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.
Unit introduction	This summarises the content of the unit and how learners will benefit from taking it.
Learning aims and grading criteria	The learning aims set out what a learner must know, understand or be able to do as the result of a process of learning. The grading criteria specify the standard the learner is required to meet to achieve a Pass, Merit or Distinction for the unit.
Unit content	This section sets out what needs to be taught. Content is compulsory except when it follows an 'e.g.'. Learners should not be asked to complete the assessment until all of the content for the unit has been taught.
Essential information for assessors	This section gives information to support delivery and the implementation of assessment.

Section	Explanation
Essential resources	This lists any specialist resources needed to deliver the unit. Centres will be asked to show that these resources are in place when they seek approval from Pearson to offer the qualification.
Assessment requirements	This gives detailed information about what evidence learners are required to show in order to meet the assessment requirements.

Index of units

This section contains all the units developed for this qualification. Please refer to *page 4* to check which units are available.

Unit 1: Managing an Event

Level: 3

Unit type: Internal

Guided learning hours: 90

Unit in brief

Learners will work as part of a small group to plan, coordinate and manage a business or social enterprise event and evaluate the skills gained.

Unit introduction

Events management is one of the most exciting and dynamic sectors of business. This unit combines your creativity and organisational skills to produce successful, memorable events, whether for profit or social enterprise.

You will investigate a number of successful events, both large and small, and use this research to assess the feasibility of events to plan and run yourself. Examples could range from organising meetings, product launches, exhibitions, promotions, charity events, team-building events and staff development, to a full-scale conference. Your chosen event will be carefully planned, demonstrating your ability to use planning tools. You will then stage the event, testing the effectiveness of your planning. This will require you to 'think on your feet', deal with financial and security issues, liaise with suppliers and venue personnel, and utilise your problem-solving skills. Afterwards you will evaluate the success of the event. To complete the assessment task within this unit, you will need to draw on your learning from across your programme.

This unit will develop your teamwork, communication, time-management, negotiation and problem-solving skills. It will help you develop the essential transferable skills that employers look for. The unit will provide a useful opportunity to consider whether to pursue a career in events management or to continue on to further study in this area.

Learning aims and grading criteria

To achieve a **Pass** grade for the unit, learners must achieve all **pass** criteria.
To achieve a **Merit** grade, learners must achieve all **pass and merit** criteria.
To achieve a **Distinction** grade, learners must achieve all **pass, merit and distinction** criteria.

Pass	Merit	Distinction
Learning aim A: Explore the role of an event organiser		
A.P1 Explain the role and skills required to be an effective event organiser. **A.P2** Investigate own skills in the form of a skills audit.	**A.M1** Analyse own skills against those required by an event organiser, highlighting areas for development.	**A.D1** Fully justify how own skills match those of an event organiser.
Learning aim B: Investigate the feasibility of a proposed event		
B.P3 Investigate the staging of several events to determine common success factors. **B.P4** Explain the chosen event idea, including reasons for choice.	**B.M2** Assess the feasibility of the event proposal.	
Learning aim C: Develop a detailed plan for a business or social enterprise event		**BC.D2** Evaluate and justify the feasibility of the plan, tools, budget and risk, making any required contingency adjustments.
C.P5 Explain factors that need to be considered when producing a detailed plan for the proposed event. **C.P6** Produce a detailed plan for chosen event using planning tools, detailed budget and consideration of risk assessment and contingency planning.	**C.M3** Analyse the key factors that need to be considered when producing a plan for an event.	

Pass	Merit	Distinction
Learning aim D: Stage and manage a business or social enterprise event		**DE.D3** Justify how own contribution has contributed to a successful outcome of the event by the demonstration of outstanding management skills throughout the arranging and staging of an event.
D.P7 Stage an event, demonstrating some relevant management skills.	**D.M4** Demonstrate effective and safe management skills when organising and staging an event.	
Learning aim E: Reflect on the running of the event and evaluate own skills development		
E.P8 Review the success of the event in meeting aims and objectives, achieving targets and receiving good feedback from stakeholders.	**E.M5** Analyse the planning and running of the event, how risks and contingencies were managed, making recommendations for future improvements.	

Unit content

Learning aim A: Explore the role of an event organiser

A1 Different tasks needed to be completed by an event organiser

- Organising: venue, location, catering, planning and reserving facilities, e.g. toilets if outdoor event, setting up programme, preparing and distributing documents, contracts.
- Investigating current legal requirements, including consumer protection.
- Setting up organisational procedures, e.g. risk assessment and security.

A2 Different skills needed by an effective event organiser

- Organisational.
- Problem solving.
- Time management.
- Negotiation.
- Communication.
- Interpersonal.

A3 Common formats for skills audit collection

- Likert scale.
- Semantic differential scale.
- Observation.
- Questionnaire.
- Appraisal.

Learning aim B: Investigate the feasibility of a proposed event

B1 Different types of event, and the factors affecting success

- Business events: conferences, exhibitions, product launches, trade shows, shareholders' meetings, press conferences, awards evenings, team building, seminars.
- Sport and recreation events: the Olympic Games, the Paralympic Games, national sports tournaments, sports matches, motor sports events, racing, equestrian events, country fairs, food festivals, fun runs, sailing regattas, animal shows, collectors' fairs.
- Entertainment: music festivals, concerts, plays.
- Celebrations: weddings, prom nights, birthdays, anniversaries.
- Social enterprise events: charity sports events, charity fundraising events, e.g. dinners, galas, auctions.

B2 Feasibility measures and critical success factors

- Mind map event ideas.

- Purpose of event.

- Aims and objectives.

- Constraints: budget, venue, resources; human and physical.

- Success factors: setting goals and targets.

Learning aim C: Develop a detailed plan for a business, or social enterprise event

C1 Event planning and the use of planning tools.

- Gantt charts.

- Critical path analysis.

- Online planning tools.

C2 Factors to be considered, including budgets, resources and contingency planning

- Aims and objectives.

- Budget: available finance, expected sales figures, banking, cost of resources, expenses such as venue, catering, staff, travel.

- Resources: flipcharts, Wi-Fi, telephone, display boards, ability to take money, chairs, tables, computer, Smart Board.

- Venue: size of room, facilities available, car parking, access arrangements.

- Catering: special consideration of dietary needs.

- Legal constraints: contracts, health and safety (risk assessment), negligence liability. •

- Team working: allocation of tasks, planning meetings.

- Insurance, including public liability.

- Methods of communication: promotion, letters, invitations.

- Contingency planning: 'what if' scenarios, e.g. 'What if the caterers don't turn up?'.

Learning aim D: Stage and manage a business or social enterprise event

D1 Management of the event

- Contracts for venue: suppliers, personnel.

- Marketing of the event: publicity, advertising, sponsorship, guest list, invitations. • Customer service.

- Monitoring procedures to ensure tasks allocated have been completed.

- Security and health and safety.

- Methods of communication: internally and externally.

- Attendee evaluation: prepare, issue and collect questionnaires.

D2 Problem solving

- Implementation of contingency plan, e.g. non-delivery of resources.

- Customer service issues.

- Health and safety issues.

Learning aim E: Reflect on the running of the event and evaluate own skills development

E1 Evaluation of the event

- Review of success: meeting aims and objectives, timing, keeping to budget set, effectiveness of contingency plan.

- Analysis of evaluation forms.

- Suggestions for improvement.

E2 Review of personal skills development in the running of the event

- Event management.

- Employability.

- Communication.

- Negotiation.

- Time management.

- Problem solving.

- Team working.

- Analysis of own skills.

Essential information for assessors

Essential resources

For this unit, learners must have access to a range of current business information from websites and printed resources.

Suggested assessment approach

This section must be read in conjunction with *Section 6 Assessment*.

This unit is assessed internally by the centre and externally verified by Pearson.

The table below shows the suggested approach to assessments.

The assessment for this unit should be set in a specific organisational context, it should draw on learning from the unit, and be designed in a way that enables learners to meet all the assessment criteria.

Learning aim		Suggested assessment approach
A	Explore the role of an event organiser	An individual report identifying tasks that would need to be carried out by an event organiser. Summary of skills needed by an event organiser and identification of own personal skills, highlighting areas for development.
B	Investigate the feasibility of a proposed event	An individual summary report and group presentation, following a detailed investigation into a range of large and small successful events, to include a justification of the chosen proposal. A detailed plan of the event, identifying critical success factors.
C	Develop a detailed plan for a business, or social enterprise event	
D	Stage and manage a business or social enterprise event	Learners must take an active part in staging and managing the event. Evidence of this such as photographic evidence, witness statements, assessor records, must be presented. A written report recording and evaluating the success of the event in terms of:
E	Reflect on the running of the event and evaluate own skills development	• meeting event objectives • achieving targets • satisfaction survey or feedback from participants • analysis and evaluation of own event-management skills.

Assessment requirements

Learning aim A

To achieve Pass, learners will produce a report/interview transcript, identifying the role and skills required to be an effective event organiser. A personal skills audit will be included.

To achieve Merit, learners will compare their own personal skills to those required by an event organiser. They will highlight areas where they need to develop their skills and make suggestions as to how this might happen.

To achieve Distinction, learners will justify how their own personal skills match those required by an event organiser.

Learning aims B and C

To achieve Pass, learners will show evidence of research into a number of different successful events and an identification of the common success factors. This will enable them to produce an effective event plan, taking into account all key planning factors and using planning tools. A budget for the event will also be provided.

To achieve Merit, learners will assess the feasibility of the proposed event. There will be an analysis to show that they clearly understand the importance of producing a contingency plan when organising an event and a rationale presented for the proposed contingency plans.

To achieve Distinction, learners will show clear justification, based on their research, of their choice of event and why it will be successful.

Learning aims D and E

To achieve Pass, learners will give evidence in the form of a diary covering all stages of the event, together with witness statements, photographic evidence and observation records. Learners will also submit a written review of the success of the event based on feedback from stakeholders.

To achieve Merit, learners will analyse the planning and staging of the event, with a particular focus on how potential risks and contingencies were managed. They will also include detailed recommendations for improvement.

To achieve Distinction, learners will produce a detailed justification on how well the event was managed and to what extent the initial plan contributed to the success (or not) of the event. Learners will justify how their own contribution was instrumental in the success of the event and the skills developed throughout the process. Learners need to show a significant and sustained participation through the planning, staging and evaluation of the event to fully achieve a distinction. A witness statement will be needed to support this.

Unit 2: Understanding Health, Safety and Security at Events Sites

Level: 4

Unit type: Internal

Guided learning hours: 60

Unit in brief

Learners will investigate health and safety and security in the events industry.

Unit introduction

This unit focuses on what learners must know and understand in relation to health, safety and security at event sites. The crucial importance of identifying and managing risk, and how this differs from event to event, is stressed. Learners must show that they understand the legal responsibilities and liabilities relating to health, safety and security at events. They are also required to know how to respond effectively and correctly to incidents and contingencies that might occur at different types of events or venues.

Learning aims and grading criteria

To achieve a **Pass** grade for the unit, learners must achieve all **pass** criteria.
To achieve a **Merit** grade, learners must achieve all **pass and merit** criteria.
To achieve a **Distinction** grade, learners must achieve all **pass, merit and distinction** criteria.

Pass	Merit	Distinction
Learning aim A: Know health and safety in the events industry		
A.P1 Outline the three main reasons why health and safety at work is important. **A.P2** Identify industry guidelines and good practice on health and safety. **A.P3** Identify the meaning of safety signs and symbols used in the industry. **A.P4** Describe site rules, welfare, facilities, muster points, fire points, first aid facilities, emergency contact numbers, access and egress and general job briefing on a typical events site.	**A.M1** Explain what may happen if health and safety procedures are not properly implemented.	**A.D1** Assess the importance of health and safety in the events/temporary structures industry.
Learning aim B: Understand responsibilities and liabilities for health and safety at events sites		
B.P5 Explain the employers' responsibilities and liabilities for health and safety at work. **B.P6** Explain every employee's responsibility and liabilities for health and safety at work. **B.P7** Explain the health and safety responsibilities and liabilities of other people working on site.	**B.M2** Compare the responsibilities and liabilities for health and safety of employers, employees and others at events sites.	

Pass	Merit	Distinction
Learning aim C: Be able to assess risks and controls on events sites		
C.P8 List the steps in risk assessment. **C.P9** Explain the difference between 'generic' and 'dynamic' risk assessment. **C.P10** Outline the typical hazards that may occur when working on site. **C.P11** Explain a method statement and its importance.	**C.M3** Compare the risks associated with different hazards and their controls/elimination.	**C.D2** Assess the importance of risk assessment and control on events sites.
Learning aim D: Know health and safety inspection procedures at events sites		
D.P12 Identify the roles that carry out health and safety inspections and what they cover.	**D.M4** Compare the roles of those officers who carry out on-site health and safety inspections.	
D.P13 Outline the effects of each of the following: • A Prohibition Notice • An Improvement Notice.		
Learning aim E: Understand security procedures at events sites		
E.P14 Explain the importance of on-site security. **E.P15** Describe typical on-site security problems and ways of dealing with these.	**E.M5** Explain what can happen if on-site security procedures are not followed.	

Pass	Merit	Distinction
Learning aim F: Understand emergency procedures at event sites		
F.P16 Describe the typical emergencies that may occur on events/temporary structure sites. **F.P17** Explain the procedures to follow in response to the typical emergencies on events sites. **F.P18** Describe the procedures for reporting accidents and incidents.	**F.M6** Explain why reporting procedures for accidents and emergencies are important.	
Learning aim G: Understand how to maintain health, safety and security on events sites		
G.P19 Outline how to encourage staff to make health, safety and security priorities in their work. **G.P20** Explain how to behave on site to reinforce messages about health, safety and security. **G.P21** Describe how to monitor a site and the work taking place to make sure health, safety and security procedures are being followed.	**G.M7** Explain how to communicate information about health, safety and security to your staff and other relevant people.	**G.D3** Discuss the effectiveness of maintenance of health, safety and security procedures and promotion.
Learning aim H: Understand how to improve health, safety and security on events sites		
H.P22 Explain the importance of continuous improvement in relation to on-site health, safety and security.	**H.M8** Explain how improvements to health, safety, and security can be supported by others.	

Unit content

Learning aim A: Know health and safety in the events industry

Why health and safety at work is important

- Reasons why health and safety at work is important (legal, statutory, organisational) for employers and employees)

- Protection of public safety and health to avoid injuries and fatalities and promote public confidence and assurance

- Specific health and safety requirements for events and temporary structures (venue safety, facilities and equipment safety e.g. stages, lighting sets, special effects, firework, low fog/dry ice, lasers, projections); personnel safety, personal and medical welfare of event attendees

- Consideration of event site rules, welfare facilities, muster points, fire points, first-aid facilities, emergency contact numbers, access and egress, facilities and procedures for people with disabilities

- Implications if health and safety is compromised (injuries or accidents, illness); possibility of legal action (loss of reputation, loss of public events licence); wider implications (impact on people and property in proximity to event, potential risk to transport in the local area)

- Guidelines and good practice to follow (Event Safety Guides, Guides to Safety at Sports Grounds, organisational guidelines, local guidelines); Statutory guidelines related to using different equipment and effects at events

- Safety signs and symbols (legal requirements e.g. health and safety signs and signals); safety signs and symbols for different types of events e.g. electronic screens, notices, illuminated signs; where and how to fix signs and symbols, importance of visibility and easy recognition, reasons why those officiating and attending events must recognise these and comply with them.

- Specific health and safety factors
  - Site rules (to control events safety and security, to ensure licensing conditions and legal requirements are complied with, specific responsibilities for areas and activities, reporting procedures, contingency instructions, control of prohibited items, unauthorised activities, entry conditions, standards and use of equipment, timing and methods for set-up, load in, load out and breakdown; rules agreed with Local Authority officers, Emergency Services, Contractors)
  - Welfare facilities (rest rooms, toilets, drinking water)
  - Muster points (designated points for people to gather in emergencies, why these should be coded, how to ensure site maps show these clearly and accurately, how to place them in safe areas)
  - Fire points (access for Fire Service vehicles, turning areas, fire extinguishing equipment)
  - First-aid facilities (triage areas, first-aid rooms, ambulance parking areas, who is responsible for maintaining facilities)

- o Emergency contact numbers (Fire, Ambulance and Police contact numbers, Site Safety Supervisor or Co-ordinator contact numbers, protocols for contacting each)
- o Access and egress (for different areas of a site, final exit points, rules for controlling access and egress for each area, rules of controlling the perimeter, rules to ensure safety and lack of obstruction e.g. width, distances, ramps, lighting
- o Event briefing (how site rules are critical, how site rules change depending on event, audience profile, expected issues; importance of ensuring event staff fully understand site rules at the briefing)

Learning aim B: Understand responsibilities and liabilities for health and safety at events sites

Employer responsibilities

- Statutory laws/regulations (health and safety at work, noise at work, working at height, electricity at work, control of substances hazardous to health, environmental protection, controlled waste); responsibilities of hazard identification and risk assessment (venue, facilities, equipment, personnel safety, personal and medical welfare of those attending the event site, provision of first-aid, toilet and food and water facilities; safe disposal of refuse and waste; safety and wellbeing of those local to the event)

Employer liabilities

- Public liability for damages, costs, loss, injury incurred in connection with the event e.g. property damage, injury or fatality, disease or illness, wilful or malicious vandalism; why it is important to comply with legal requirements and responsibilities for public liabilities; how insurance can be invalidated if procedures are not followed

Employee responsibilities

- Legal, organisational, industry best practice relating to hazard identification and risk assessment, duty of care to ensure safety and wellbeing of self and others; the importance of following guidelines and procedures and encouraging others to do so; implications of not following these

- Additional responsibilities of event supervisor (liaising with licensing/certifying authorities and emergency services, supervising contractors in setup and breakdown, management and recording of control procedures, ensuring facilities and staff are adequate to ensure safety and wellbeing, preparing operational plan, emergency plan, contingency plan, briefing event staff)

- Employee liabilities (legal duty of care to maintain safety of self and others)

Site supervisor

- Supervisors additional responsibilities and liabilities for health and safety (overarching duty of care to work safely and ensure the safety of others including event personnel and members of the public, setting professional example to event staff, appointing and managing an event safety coordinator, following health and

safety requirements and guidelines for all aspects before, during and after an event e.g. drawing up operational plans, contingency plans, liaising with emergency services, carrying out risk assessments, managing the control of entry and egress, monitoring security before, during and after an event, ensuring hospitality facilities meet health and safety requirements including food safety, monitoring set-up and handling of equipment including special effects, lighting and sound systems, ensuring equipment is used safely, arranging for event personnel to be trained in health and safety, ensuring those involved in designated activities at the event are licenced, reporting on health and safety including any incidents after the event).

Other people working on site

- Health and safety responsibilities of those working on site (statutory requirements applicable to everyone so they work safely and be responsible for others' safety, to follow organisational and manufacturer's instructions when using equipment, to handle and move equipment and loads safely, to respond to injury or illness appropriately).

- Liabilities of all on site e.g. sound and light engineers, stage technicians, security staff, close protection staff, catering staff, volunteers; why it is important to act in accordance with event guidelines, to follow event briefing instructions; how failure to do so may create hazards, invalidate insurance, damage public standing of the organisation.

Learning aim C: Be able to assess risks and controls on events sites

Risk assessment and control

- Five risk assessment steps (identifying risk, deciding who may be harmed and how, evaluating the risks and defining precautions, recording and implementing findings, reviewing)

- Generic risk assessment as a framework to describe how all risk assessments for events are carried out, what they should include, how they set parameters against which operational plans and contingency plans can be made

- Dynamic risk assessments to be undertaken for specific events both before and during the event; why it is important to use both forms of risk assessment e.g. to respond to and control incidents, to manage contingencies, to evaluate changing situations

- Typical hazards that may occur at an event site (fire or explosion, severe weather, flooding, power failure, drainage blocks, trip and fall hazards, crowd surges or disorder, vandalism and damage to facilities or equipment, blocked or inaccessible accessed points)

- Risks that these may present in different types of events (indoor, outdoor, in open spaces, in confined areas, at sites designed for public events, at sites not designated for public events)

- Range of risks (potential injury or fatality, damage to public health, loss of amenity, delay in event schedule, breach of security, loss of personal possessions, damage to the environment)

- How to manage risks (following contingency plans, following the organisation's method statement; the importance of designating key personnel to monitor specific areas and activities; setting out reporting intervals and protocols; using different methods to monitor and control risk e.g. observation platforms, CCTV, radio, personal surveillance, patrols)

- Method statements for events (as a means of itemising all aspects of preparation, setting up, loading in, loading out and breakdown of an event so that each can be checked and completed on a due date; to identify responsibilities for each aspect; method statements include safe working arrangements for the event e.g. risk assessments, staff required, staff training and competencies, equipment required, checking compliance with safety laws/regulation).

- Importance of completing a Method Statement (to prepare and plan effectively, to meet local authority and emergency service requirements, to highlight shortfalls, to identify specific venue or event requirements).

Learning aim D: Know health and safety inspection procedures at events sites

Inspections

- Health and safety inspections (the process and purpose of onsite health and safety inspections, who carries these out e.g. Fire Authority, Police Authority, Health and Safety Enforcement Officers, Local Authority; what they cover e.g. emergency access routes, places of safety, seating capacity, event capacity, entry and egress points, emergency lighting, door and gate fastenings, noise and sound levels, fire fighting equipment, fire alarm equipment, special risks for certain types of stage and equipment; the possible outcomes of an inspection e.g. Prohibition Notice, Improvement Notice, powers of officers to prevent an event taking place, to issue a schedule of remedial works to complete, to publish notice)

Notices

- Why a Prohibition Notice might be issued (when the Fire Authority believe that the use of the premises for an event would pose a serious risk to those involved or where the means of escape from the premises is inadequate; the effects of a Prohibition Notice to suspend the event until the Notice is withdrawn)

- Why an Improvement Notice might be issued and the effects of this (how to record and use findings of the inspection to rectify shortfalls; who to liaise with about the findings of the inspection and to agree actions needed; the importance of complying with the Notice and following the schedule of remedial works; how to get a Notice withdrawn, appealing against Prohibition Notices; publication of the Notice on a public register)

- Importance to carry out inspections well in advance of the event; timescales for taking actions to regularise the situation so that the event can proceed

Learning aim E: **Understand security procedures at events sites Inspections**

Importance of on-site security

- Crucial role played by security staff at events (ensuring safe entry and egress, controlling authorised and unauthorised entry, emergency incidents, controlling authorised and unauthorised entry, emergency incidents, controlling restricted access areas, ensuring safety of those performing at and attending the event, monitoring for prohibited substances, unlawful behaviour, restricted items, liaison with Event Manager, liaison with emergency services; the different role and remit of others involved in security e.g. Police, stewards, event volunteers)

- What can happen if security procedures are not followed (crowd surges, crown disorder, damage, theft, accidents, injuries, fatalities; delays due to uncontrolled or poorly marked entry or egress, disruptions to performance due to damage or theft of equipment)

- Typical problems (crowd surges, crowd disorder, vandalism, damage to facilities, equipment, theft of or damage to personal possessions, accidents, theft of equipment, breach of perimeters, unauthorised access to designated areas, use of unauthorised substances, unlawful behaviour)

- These may be different depending on the event type and event site e.g. outdoor, indoor, large, small, in facilities designed for events, in facilities not designed for events, in urban areas, in rural areas

- Dealing with problems (contacting and liaising with emergency services, setting out ambulance points, implementing incident control points, following evacuation routes and assembly points, ensuring safe evacuation of disabled persons, scripting PA announcements, video screen alerts and coded security alerts and messages; obtaining situation reports, correct deployment of security and stewarding personnel e.g. searching individuals, confiscating items, patrolling areas, ejecting individuals, detaining in secure areas)

Learning aim F: **Understand emergency procedures at event sites**

Typical emergencies

- Emergencies (statutory requirements to manage emergencies and major incidents, potential emergencies at different types of event e.g. fire, floods, adverse weather, accidents, illness, security incidents and alerts, structural failure, crowd surge and collapse, crowd disorder, over-stretched capacity)

Emergency procedures

- Procedures planned (Major Incident Plan, Event Contingency Plan)

- Procedures include contact and liaison with emergency services, setting out ambulance points, implementing incident control points, following evacuation routes, assembly points, correct deployment of security and stewarding personnel, ensuring safe evacuation of disabled persons, scripting PA announcements, video screen alerts and coded security alerts/messages; obtaining situation reports

Accident and incident reporting

- Legal requirements for reporting accidents and incidents (when and how the report must be made, maintaining agreed protocols for reporting, who to notify in case of an accident, e.g. national Health and Safety authority, Emergency Services, Local Authority; who to notify following an incident, e.g. national Health and Safety authority, Police, Local Authority; organisational procedures for reporting accidents and incidents)

- Importance of reporting accidents and emergencies (to comply with legal requirements, to provide information to relevant authorities, to avoid further accidents or emergencies through rectifying faults, making improvements, learning from mistakes)

Learning aim G: Understand how to maintain health, safety and security on events sites

Health, safety and security promotion

- Importance of encouraging those involved to make health, safety and security priorities in their work through event briefings, circulating clear guidance at appropriate points during planning, revisiting and reminding during the event

- Ensuring guidance is targeted to suit specific needs (event staff, contractors, security personnel, volunteers; arranging appropriate training on health, safety and security)

- Reinforcing messages about health, safety and security: by setting an example from own behaviour, by complying with all legal and organisational requirements, by checking that others are complying with requirements, by verbally reminding personnel, by using signage and video screens to remind those attending the event, through announcements

Monitoring health, safety and security on-site

- Monitoring (through personal observation, using closed circuit television (CCTV) in a control room, receiving telephone, radio and face-to-face reports from security staff, stewards, emergency services personnel; using method statements to check key activities have been completed)

- Range of methods that may be used to communicate information about health, safety and security to event staff and others such as emergency services, performers, contractors (briefings, handouts, route-marking and signs, information displays, screens, scoreboards, face-to-face contact, PA systems, radio systems, loud hailers; agreeing protocols for communications, ensuring event staff comply with these; having accurate site plans and maps with clear coding of areas)

Learning aim H: Understand how to improve health, safety and security on events sites

Continuous improvement of health, safety and security

- Importance of continuous improvement (in maintaining the organisation's reputation, to reassure the public, to ensure continuing good relationships with licensing authorities and emergency services)

- Using findings from health and safety inspections, risk assessments and feedback to formulate improvement plans

- Researching other events to identify success factors; reviewing own critical success factors against performance measures

- Consulting with other people who can support improvements (experienced security personnel, local authority officers, emergency services advisers, national health and safety officers, hospitality specialists)

Essential information for assessors

Essential resources

There are no specialist resources needed for this unit.

Suggested assessment approach

This section must be read in conjunction with *Section 6 Assessment*.

This unit is assessed internally by the centre and externally verified by Pearson.

The table below shows the suggested approach to assessments.

The assessment for this unit should be set in a specific organisational context, it should draw on learning from the unit, and be designed in a way that enables learners to meet all the assessment criteria.

Learning aim	Suggested assessment approach
A Understand health and safety in the events industry	The main source of evidence for this unit is likely to be product evidence, for example records of risk assessments, meetings, security briefings, emails/memos confirming safety requirements, advising of additional controls, method statements etc. If this is not available, tutors should consider setting an assignment/case study based on a real event, either one from the past or one to be held in the near future. Learners should complete documentation relating to health, safety and security assessment and control for the case study event.
B Understand responsibilities and liabilities for health and safety at events sites	
C Understand risk assessment and control on events sites	If learners are in an employment situation or on a work placement, it should be possible to observe them undertaking risk assessments for an event. They may also be observed discussing health, safety and security issues with colleagues, emergency services officers and local authority officers. Assessors may be able to observe the learner at an event, monitoring health, safety and security.
D Understand health and safety inspection procedures at events sites	Witness testimony from colleagues, suppliers, contractors, officials, managers, customers/visitors could be obtained verbally to confirm learners' scope of understanding of their responsibilities for ensuring health, safety and security at events.
E Understand security procedures at events sites Inspections	Additional evidence of knowledge and understanding may be gathered through professional discussion with learners. They should be encouraged to bring evidence of their

Learning aim	Suggested assessment approach
F Understand emergency procedures at event sites	performance to the discussion, so that this may be referred to as validation.
	Simulations, including role play, for example debriefing after an incident or issue at an event, should be as realistic as possible and should be discussed with the Standards Verifier to ensure that these are valid, fair and reliable as a source of evidence.
G Understand how to maintain health, safety and security on events sites	Assessment should be planned to ensure efficient and effective gathering of evidence, through holistic tasks and activities. These should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of knowledge and understanding in a work-related setting.

Unit 3: 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 and grading criteria

To achieve a **Pass** grade for the unit, learners must achieve all **pass** criteria.
To achieve a **Merit** grade, learners must achieve all **pass and merit** criteria.
To achieve a **Distinction** grade, learners must achieve all **pass, merit and distinction** criteria.

Pass	Merit	Distinction
Learning aim A: Explore how organisations use promotion to successfully market events		
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.	**AB.D1** Evaluate the success of marketing strategies and methods used in different events, recommending areas of improvement.
Learning aim B: Develop a marketing campaign to promote an event		
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.M3** Produce a detailed marketing plan for an event, with research, budgeting, time-planning, and appropriate promotional materials.	**B.M3** Produce a thorough and effective marketing plan for an event, with detailed research, budgeting, time-planning and effective promotional materials.
Learning aim C: Market and promote an event for a given audience		
C.P6 Promote an event using marketing materials and methods to a given audience.	**C.M4** Demonstrate effective marketing skills when promoting an event and gathering audience feedback.	**C.D2** Evaluate the success of the implementation and outcomes of the marketing campaign, justifying suggestions for improvements.
Learning aim D: Evaluate the success of the marketing campaign in meeting objectives		
D.P8 Review the success of the marketing campaign in meeting aims and objectives.	**C.M4** Analyse the planning and implementation of the marketing campaign, making recommendations for future Improvements.	

Unit 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 o 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

     o 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.

Essential information for assessors

Essential resources

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.

Suggested assessment approach

This section must be read in conjunction with *Section 6 Assessment*.

This unit is assessed internally by the centre and externally verified by Pearson.

The table below shows the suggested approach to assessments.

The assessment for this unit should be set in a specific organisational context, it should draw on learning from the unit, and be designed in a way that enables learners to meet all the assessment criteria.

Learning aim		Suggested assessment approach
A	Explore how organisations use promotion to successfully market 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	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	Photographic/video evidence of learner produced, post-event marketing materials, witness statements and assessor records must be presented. A report evaluating the success of the marketing campaign, with suggestions for improvement.
D	Evaluate the success of the marketing campaign in meeting objectives	

Assessment requirements

Learning aim A

To achieve 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.

To achieve 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.

To achieve 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.

Learning aim B

To achieve 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.

To achieve 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.

To achieve 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.

Learning aims C and D

To achieve 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.

To achieve 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.

To achieve 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.

Unit 4: Team Building in Business

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

Learners study the dynamics of team building, examine the underpinning theory and participate in team activities.

Unit introduction

The importance of teams that perform well cannot be underestimated. It is generally accepted that successful businesses have effective teams in place. An effective team is one that is led and managed well. The team is also motivated, well-briefed, and communicates well.

In this unit you will learn how successful businesses draw on effective teams. For example, Formula One® motor racing relies on excellent teamwork, which is modelled by many businesses. A team allows its members to use their collective strength and to share ideas, perspectives and experiences. You will learn that nearly all individuals in a business belong to one or more groups or teams that contribute to the overall corporate strategy of the business. You will learn the different roles within a team and the importance of establishing a shared vision when making collaborative decisions.

In this unit you will get to work in, and lead, a team. The unit and the team activities will give you the practical tools you need to support and lead a team. It develops key employability skills and will be useful both in the workplace and in your studies.

Learning aims and grading criteria

To achieve a **Pass** grade for the unit, learners must achieve all **pass** criteria.
To achieve a **Merit** grade, learners must achieve all **pass and merit** criteria.
To achieve a **Distinction** grade, learners must achieve all **pass, merit and distinction** criteria.

Pass	Merit	Distinction
Learning aim A: Examine the benefits of teams in a business setting		
A.P1 Explain the purpose of a given team in a chosen business. **A.P2** Explain the characteristics of a given team in a chosen business.	**A.M1** Assess how and why a given team will benefit a chosen business.	**A.D1** Justify how and why a given team will benefit a chosen business.
Learning aim B: Investigate techniques and theories used for the development of an effective business team		
B.P3 Discuss the roles in an existing team at a chosen business, giving clear links and references to a recognised theorist. **B.P4** Discuss the dynamics of an existing team and how they work towards their goals.	**B.M2** Analyse the roles and dynamics of an existing business team and make recommendations for improvements to its cohesiveness.	**B.D2** Evaluate the effectiveness of an existing business team, including overall team performance, individual performance and leadership, linking to theory.
Learning aim C: Develop effective team skills through practical activities		
C.P5 Show the ability to work as a team leader and team member through active participation in team activity. **C.P6** Reflect on your own effectiveness in team activities and use feedback to plan improvement in performance.	**C.M3** Work efficiently as a member of a team and as a team leader and use feedback to assess how conflict was managed.	**C.D3** Demonstrate initiative, self-management and creativity in the professional development of team skills.

Unit content

Learning aim A: Examine the benefits of teams in a business setting

A1 The difference between a group and a team

- Definitions of a group and a team.

A2 Types and purposes of business teams

- Structure: formal, informal.
- Size: small, large.
- Type: temporary, permanent, remote/virtual, horizontal or vertical.
- Purpose: to achieve goals, increase efficiency and productivity, to be innovative.

A3 Characteristics and benefits of an effective team

- Characteristics:
  o sense of purpose
  o prioritisation of team goal
  o members have clear roles
  o clear lines of authority and decision making
  o conflict dealt with openly
  o personal traits appreciated and utilised
  o group norms set for working together
  o success shared and celebrated
  o trained and skilled members
  o good interpersonal relationships
  o all have opportunity to contribute.
- Benefits:
  o contribution to the productivity and effectiveness of the business
  o development of a common purpose
  o clarification of roles
  o reduction of alienation
  o sharing of expertise
  o identification and development of talent
  o increased motivation
  o fostering innovation
  o stretching people's talents.

Learning aim B: Investigate techniques and theories used for the development of an effective business team

B1 Team-building techniques

- Team membership and roles: team members have the required technical and role-based skills, leadership is established, clear lines of authority.

- Purpose and goal: purpose is communicated and agreed, all team members working towards a common goal, collaborative decision-making, responsibility for tasks.

- Communication:
  - vision/objectives/targets are shared o work proceeds more smoothly and efficiently
  - cooperation among team members is enhanced o feedback is encouraged
  - openness and trust are promoted
  - good work ethics and mutual respect are established
  - team is led by example
  - members are encouraged to deal with challenges without complaining
  - members support and respect each other.

- Rewards:
  - regular positive and supportive feedback
  - acknowledgement and recognition of team and individual success.

B2 Theories of team development

- Belbin's nine team roles: identification of people's behavioural strengths and weaknesses in the workplace to provide a balanced team, contributions and allowable weaknesses of each role.

- Tuckman's four stages of team development: the link between the relationships in the group and the focus on the task.

B3 Causes of team conflict

- Importance of group/team dynamics.

- Bell and Hart's eight causes of conflict: conflicting resources, conflicting work styles, conflicting perceptions, conflicting goals, conflicting pressures, conflicting roles, different personal values, unpredictable policies.

- Non-compliance with rules and policies: personal non-compliance or disregard for company policy by colleagues (discriminatory behaviour, unacceptable language, poor attendance and timekeeping).

- Misunderstandings: poor communication leading to misunderstandings.

- Competition/rivalry: competition instead of collaboration, anti-productive

Learning aim C: Develop effective team skills through practical activities

C1 Being an effective team member

Skills:

- objective setting, common purpose
- trust and respect for all
- feedback: to be able to give and receive
- interpersonal and communication skills
- Motivation
- Responsibility
- clarifying objectives, agreeing tasks, working towards a common purpose.

C2 Being an effective team leader

Skills:

- objective setting, common purpose
- motivation of others
- integrity
- managing aspirations and talent
- resolution of conflict
- leadership style.

Essential information for assessors

Essential resources

For this unit, learners must have access to a range of current business information from websites and printed resources.

Suggested assessment approach

This section must be read in conjunction with *Section 6 Assessment*.

This unit is assessed internally by the centre and externally verified by Pearson.

The table below shows the suggested approach to assessments.

The assessment for this unit should be set in a specific organisational context, it should draw on learning from the unit, and be designed in a way that enables learners to meet all the assessment criteria.

Learning aim	Suggested assessment approach
A Examine the benefits of teams in a business setting	A report that examines teams in business settings. It should consider types of teams and their purpose, and the benefits of these teams to the businesses. A report that examines the effectiveness of a real team in a business setting. It should reflect on team theories and make recommendations for improvements to the team.
B Investigate techniques and theories used for the development of an effective business team	
C Develop effective team skills through practical activities	The evidence will focus on what went well and what did not in the team activities. Learners should evaluate and self-critique their performance in a team, the development of their skills, and evaluate the effectiveness of the team.

Assessment requirements

Learning aims A and B

To achieve Pass standard, learners will explain the purpose and characteristics of the chosen team and they will discuss the roles and dynamics of a team in their chosen business, and how teams are used in a variety of ways. This will include reference to different types of teams. Team-building techniques and the theory of team development will be included in the report.

To achieve Merit standard, learners will demonstrate clear analysis of the range of techniques used to build effective teams. Some of this analysis should be gained from a visit or interview. The report will analyse how the roles in a team support the outcomes of the effective team and this should be referenced to theory.

To achieve Distinction standard, learners will give examples of the types and purposes of business teams and the challenges in building an effective team. To support the evaluation, learners will use examples from their chosen business and from other businesses. They will evaluate the performance and leadership of their chosen team, linking relevant theory and including how the team works together.

Learning aim C

Learners will participate in substantial team activities. Team activities will be full-day events or carried out in several sessions over a short time. Learners will have an opportunity to both lead a team and be a team member. Detailed peer and assessor observation/feedback sheets and an individual learner logbook will be completed so that information is available for review.

To achieve Pass standard, learners will reflect on their skills, both as team members and as team leaders. Learners will explain how they dealt with situations that arose during the activities in which they participated.

To achieve Merit standard, learners will assess their individual performance both as team members and as team leaders. Learners will need to explain how conflict was managed.

To achieve Distinction standard, learners will demonstrate a professional approach throughout the unit; they will have shown self-management together with initiative and creativity in their research and teamwork. An independent approach is one where a learner develops their own ideas or develops ideas in distinctive ways. They will demonstrate a professional approach to teamwork, and an attention to detail and precision throughout their work. A witness statement will be needed to support this.

Unit 5: 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 and grading criteria

To achieve a **Pass** grade for the unit, learners must achieve all **pass** criteria.
To achieve a **Merit** grade, learners must achieve all **pass and merit** criteria.
To achieve a **Distinction** grade, learners must achieve all **pass, merit and distinction** criteria.

Pass	Merit	Distinction
Learning aim A: Investigate influencers and their associated marketing campaigns		**AB.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.	

Unit 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

  - o guest blog posts
  - o brand ambassadors
  - o 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.:
  - o promote a brand, product or service
  - o gain awareness
  - o increase engagement
  - o create more links to the organisation's content
  - o drive app downloads
  - o change brand perception
  - o direct communication with customers
  - o closeness of influencer to customers' tastes/likes
  - o influencing consumer trust
  - o 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:
  - o paid-for sponsorship in exchange for publicity, e.g.
    - – product placement
    - – blog posting
    - – product mentions
  - o 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.:
  - o data protection law/legislation
  - o competition law
  - o advertising codes of practice
  - o consumer protection
  - o Customer Contracts Regulations (Information, Cancellation and Additional Charges)
  - o requirements for specific products, such as alcohol, gambling, tobacco, food, healthcare, beauty products.

- Ethical issues, e.g.:
  o transparency of commercial relationships
  o declaring sponsorship
  o disclosing free goods or services
  o fake reviews.

B3 Assessing an influencer marketing campaign

- Research into an influencer campaign, e.g.:
  o audience reach
  o targeting and types of customer
  o creativity
  o disclosure of sponsorship
  o exposure
  o audience feedback
  o relevance to the brand
  o 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:
  o relevance to organisation
  o resonance and influence
  o reach
  o approach of influencer.

- Compensation, e.g.:
  o payment
  o free products or discounts
  o commission or royalties
  o other expenses.

- Method and format, e.g.:
  o organisation controlled
    – creative freedom, such as
    – allowing influencers personal creative decisions
    – using own photographers or videographers
  o 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.

Essential information for assessors

Essential resources

There are no specialist resources needed for this unit.

Suggested assessment approach

This section must be read in conjunction with *Section 6 Assessment*.

This unit is assessed internally by the centre and externally verified by Pearson.

The table below shows the suggested approach to assessments.

The assessment for this unit should be set in a specific organisational context, it should draw on learning from the unit, and be designed in a way that enables learners to meet all the assessment criteria.

Learning aim	Suggested assessment approach
A Investigate influencers and their associated 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	Portfolio of market research, influencer marketing plan and brief for influencer.
C Develop an influencer marketing plan for a specific organisation	

Assessment requirements

Learning aim A

To achieve 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.

To achieve 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.

To achieve 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.

Learning aims B and C

To achieve 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.

To achieve 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.

To achieve 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.

Unit 6: Digital Marketing

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

Learners examine the different aspects of web-based marketing, and the channels that can be used to deliver a successful digital marketing campaign.

Unit introduction

This unit will allow you to develop your marketing skills and provide an understanding of the role of digital marketing in identifying and satisfying customers. In this unit, you will examine the purpose of digital marketing in a business and consider the specific aims and objectives of this function. You will research how digital marketing is used today, and develop an understanding of the benefits of, and concerns about, digital marketing. You will investigate the different delivery methods and the use of key performance indicators (KPIs) used to evaluate the success of the digital message. You will use this knowledge to make recommendations for a digital marketing campaign for a selected business. This unit will give you an insight into the importance of digital marketing as part of the wider marketing function, and enable you to make an informed choice on the suitability of this area of marketing as an employment or training possibility.

Learning aims and grading criteria

To achieve a **Pass** grade for the unit, learners must achieve all **pass** criteria.
To achieve a **Merit** grade, learners must achieve all **pass and merit** criteria.
To achieve a **Distinction** grade, learners must achieve all **pass, merit and distinction** criteria.

Pass	Merit	Distinction
Learning aim A: Examine the role of digital marketing within the broader marketing mix		
A.P1 Explain the role of digital marketing as an extension of traditional marketing and the ways the messages can be delivered. **A.P2** Investigate the ways in which advertisers are targeting mobile device users.	**A.M1** Analyse, using examples, the effectiveness of different digital delivery methods.	**A.D1** Justify the extent to which the digital environment is influencing consumer choices.
Learning aim B: Investigate the effectiveness of existing digital marketing campaigns		
B.P3 Discuss the digital strategies that a selected business uses to meet two different objectives. **B.P4** Outline different compensation models used in digital marketing. **B.P5** Explain the benefits of, and concerns about, digital marketing from the perspective of both the customer and the marketer.	**B.M3** Analyse the different digital strategies and compensation models used to create brand recognition and brand loyalty.	**B.D2** Evaluate the effectiveness of digital marketing campaigns from different businesses, and suggest ways to overcome concerns raised about digital marketing.

Cont.

Pass	Merit	Distinction
Learning aim C: Develop a digital marketing campaign for a selected product or brand		**C.D2** Produce creatively a digital marketing campaign, justifying the key decisions taken and potential improvements that could be used to create brand loyalty.
C.P6 Evaluate the effectiveness of digital marketing campaigns from different businesses, and suggest ways to overcome concerns raised about digital marketing.	**C.M4** Produce a detailed digital marketing campaign and demonstrate how it integrates into the wider marketing and promotional mix for a new or existing product or brand.	

Unit content

Learning aim A: Examine the role of digital marketing within the broader marketing mix

A1 Digital marketing in the marketing function

- Definitions of digital marketing:
  - the use of digital technologies to create integrated, targeted and measurable communications that help to acquire and retain customers while building deeper relationships with them (Digital Marketing Institute)
  - achievement of marketing objectives through the use of digital media and technology.
- Role of digital marketing as an extension to, rather than a replacement for, the traditional marketing and promotional mix.
- Current trends in digital marketing, e.g. the move to mobile communications.
- The use of digital marketing to target specific market segments.
- The development of customer databases in delivering digital communications, including the use of free content for lead generation.

A2 How the digital communication is delivered

- Display advertising, banners, pop-ups, floating advertisements (ads), interstitial ads, text ads.
- Search engine marketing, optimisation and sponsored searches.
- Social media marketing.
- Email advertising.

A3 Devices for displaying digital communications

- Personal computers, smartphones, tablets and games consoles.

Learning aim B: Investigate the effectiveness of existing digital marketing campaigns

B1 Digital marketing objectives

- Lead generation.
- Brand awareness.
- Customer retention.

B2 Digital strategies to meet target objectives

- Content marketing
- relevance, pressure to keep refreshed.
- Paid search advertising.

- Search engine optimisation.

- Social media marketing.

- Video marketing.

- Video blogging (vlogging).

- Email marketing.

- Mobile applications (apps).

- QR codes.

- Responsive web design.

B3 Return on investment compensation models

- Cost per mile (CPM).

- Cost per click (CPC).

- Cost per engagement (CPE).

- Cost per view (CPV).

- Fixed cost.

B4 Benefits and concerns of online advertising

- Benefits, including cost, measurability, formatting, targeting, coverage, speed.

- Concerns, including banner blindness, fraud and other illegal activity, display variations, ad blocking, privacy/data security, consumer location tracking, spam.

Learning aim C: Develop a digital marketing campaign for a selected product or brand

C1 Marketing planning process

- Set objectives – lead generation, brand awareness, customer retention.

- Analysis of target segment, brand persona and competition.

- Resource identification – human, financial and technological.

- Implementation planning and testing.

- Measurement against targets.

C2 Integration in the wider marketing and promotional mix

- Marketing objectives.

- Marketing mix.

- Promotional mix.

- Anticipated returns.

Essential information for assessors

Essential resources

For this unit, learners must have access to a range of current business information on websites and from printed resources.

Suggested assessment approach

This section must be read in conjunction with *Section 6 Assessment*.

This unit is assessed internally by the centre and externally verified by Pearson.

The table below shows the suggested approach to assessments.

The assessment for this unit should be set in a specific organisational context, it should draw on learning from the unit, and be designed in a way that enables learners to meet all the assessment criteria.

Learning aim	Suggested assessment approach
A Examine the role of digital marketing within the broader marketing mix	A presentation that assesses the influence of digital marketing in shaping customer behaviour and buying habits, and which then outlines the effectiveness of two existing digital marketing campaigns from two different types of business. There will also be an evaluation that highlights different compensation models, benefits and concerns. An accompanying report considering the benefits and potential concerns of digital marketing will also be provided.
B Investigate the effectiveness of existing digital marketing campaigns	
C Develop a digital marketing campaign for a selected product or brand	A fully justified plan for a digital marketing campaign.

Assessment requirements

Learning aims A and B

To achieve Pass standard, learners will describe the role digital marketing is playing in the marketing process. Current examples should be used to demonstrate latest trends, such as the use of vlogging to promote goods and the distribution of free digital content to acquire new leads. They will also explain the different ways in which digital communications can be delivered to consumers, the devices that are currently being used and the trend towards the increasing use of mobile devices. There will be an attempt at discussing the digital strategies and compensation models used and an attempt to explain some of the limitations and benefits to the consumer and the marketer of digital marketing.

To achieve Merit standard, learners will demonstrate their analytical skills by discussing the merits and disadvantages of at least three digital communication methods, which should be chosen from at least two different types. For example, learners could choose to discuss the use of interstitial adverts, search engine optimisation and social media marketing. Learners should also analyse the different digital strategies and compensation models used and explain how these are used to create brand recognition or brand loyalty.

To achieve Distinction standard, learners will investigate a range of digital marketing campaigns to identify the different types of communication used and their effectiveness in reaching different target segments. Different strategies should be considered, one of which should be the use of video or vlogging to help create brand recognition or brand loyalty. Two different campaigns from different businesses will be discussed and then evaluated in detail to establish how successful they were. Learners will have discussed the suitability of the compensation model used. There will be justified solutions to overcome the concerns about digital marketing.

Learning aim C

To achieve Pass standard, learners will produce an outline for a digital marketing campaign that clearly demonstrates brand loyalty for a new or existing brand. Clear reference will be made to the digital application and how brand loyalty is created.

To achieve Merit standard, learners will develop a fully-detailed digital campaign and explain how the plan is integrated into and complements the wider marketing and promotional mix.

To achieve Distinction standard, learners will produce a fully justified and creative digital marketing campaign for a product or brand. There will be reflection on the key decisions taken when producing the elements of the campaign, and suggestions on how the campaign might be improved.

Unit 7: Creative Promotion

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

Learners study how creative promotion influences the buying decisions of customers, stimulates demand, creates brand personality, and promotes products and services.

Unit introduction

Effective promotion attracts and persuades customers to buy products and services. It is used to stimulate sales and develop brand loyalty. Businesses use a range of marketing communications and activities to convey their messages.

This unit will develop your understanding of the ways in which businesses communicate with current and potential customers for promotional purposes. You will explore the methods used by contrasting businesses and reflect on the suitability of specific methods used to achieve marketing objectives. In this unit, you will use your creative skills to produce a fully costed plan for a promotional campaign.

The unit will help you to decide if you would like to work in or continue to further study in this area.

Learning aims and grading criteria

To achieve a **Pass** grade for the unit, learners must achieve all **pass** criteria.
To achieve a **Merit** grade, learners must achieve all **pass and merit** criteria.
To achieve a **Distinction** grade, learners must achieve all **pass, merit and distinction** criteria.

Pass	Merit	Distinction
Learning aim A: Explore the role of integrated marketing communications in creative promotion		
A.P1 Explore and illustrate how marketing communication aids creative product promotion. **A.P2** Explain the importance of integrated marketing communication activity to contrasting businesses.	**A.M1** Analyse the effectiveness of the marketing communication activities of contrasting businesses.	**A.D1** Assess the extent to which promotional activity supports the achievement of promotional objectives for a selected business.
Learning aim B: Review the effectiveness of the promotional mix used by different businesses		
B.P3 Explain the promotional mix used by contrasting businesses. **B.P4** Illustrate and explain the influences on the promotional activities used by contrasting businesses.	**B.M2** Analyse the factors that influence the choice of promotional activity in contrasting businesses.	**B.D2** Evaluate the extent to which internal and external factors will influence the success of promotional activity.
Learning aim C: Create a plan for a promotional campaign.		**C.D2** Demonstrate individual self-management, research and initiative in the preparation and evaluation of a high-quality and creative plan for a promotional campaign.
C.P5 Describe the target market for a product or service offered by a selected business. **C.P6** Plan and prepare a costed promotional plan for a product or service for a selected business.	**C.M3** Assess the extent to which the proposed promotional plan meets both business and consumer needs.	

Unit content

Learning aim A: Explore the role of integrated marketing communications in creative promotion

A1 The purposes of marketing communications

- To inform, e.g. create awareness of a product, service or brand, to develop understanding of the features and/or characteristics of a product or service.

- To persuade, e.g. convince current or potential customers to change their behaviour, encourage purchasing decisions, visit a website or physical store.

- To differentiate, e.g. highlight unique characteristics of different products, position products, influence the behaviour and attitudes of customers.

- To reinforce and reassure, e.g. positive experiences of products or services, beliefs about own and/or competitors' products.

A2 Developing effective marketing communications

- Communications objectives, e.g. raise awareness, increase knowledge, encourage choice; links between these and promotional and marketing objectives; their role in the achievement of corporate objectives.

- Identify target audience, e.g. adapt messages for different target groups, develop a brand; use marketing research to make judgements.

- Design a message: content, structure, format; appropriateness to target market; potential legal and ethical issues; types of appeal.

- Receive feedback: product trials, promotions and messages; use feedback to measure customer satisfaction, manage expectations and modify promotional activities.

A3 The importance of integrated marketing communications

- Consistency of promotional activities, e.g. branding elements and being 'on message'; consequences of inconsistency.

- Consistency with other elements of the marketing mix, e.g. with pricing, distribution and product; ensuring that customers get a consistent message.

Learning aim B: Review the effectiveness of the promotional mix used by different businesses

B1 The elements of the promotional mix

- Advertising: forms, e.g. print, cinema, TV, online; considerations when planning advertising; cost, reach, penetration.

- Personal selling: sales behaviour, e.g. getting, giving and using information; ethics of selling, e.g. high-pressure sales, mis-selling of products (e.g. banks and PPI).

- Sales promotion: methods, e.g. competitions, discounts, multi-buy offers; customer loyalty versus increased sales; effect on the credibility of messages in other channels.

- Direct marketing: forms, e.g. postal, email; costs and benefits of direct communications.

- Public relations: approaches, benefits and drawbacks of PR activity.

- The effectiveness of promotional activity: integration with the marketing mix and promotional objectives; allocation of budget to methods used; choice of message channels and their effectiveness in conveying messages; impact of competitors.

B2 Influences on the choice of promotional activities

- Appropriateness of promotional activities in different types of market, e.g. mass, niche, B2B, B2C, goods, services.

- Link between promotional activities and strategies, e.g. push and pull strategies.

- Ethical issues and promotional activities, e.g. accuracy of messages, targeting of vulnerable groups (payday loans aimed at younger people, pester power).

- Use of statistics and research to mislead, e.g. claims about customer preferences based on poorly-designed research.

- Legal issues, e.g. consumer legislation, other issues relating to taste and decency, sponsorship; industry codes of practice.

- Organisational influences on promotional activity, e.g. availability of finance, corporate objectives.

- Political influences, e.g. government, media, relevant pressure groups; impact of scandals such as horsemeat in food.

- Social factors, e.g. fashions, trends, demographics, religious beliefs.

- Competitive pressures: rivals' actions, e.g. spoiler campaigns; market context growth, decline; market position; leader or follower.

Learning aim C: Create a plan for a promotional campaign.

C1 Linking promotional methods to market segments

- Approaches to market segmentation, e.g. demographic, geographic, geo-demographic; specific requirements of different market segments; importance of adapting communication techniques to meet these.

C2 Costing promotional activities

- Setting a promotional budget, e.g. percentage-of-sales method, competitive parity, objective and task method, affordable method.

- Costing different forms of promotion, e.g. production costs, channel costs.

- Monitoring promotional expenditure, identifying variances, understanding reasons for variances in promotional spending.

C3 Planning promotional activities

- Producing a proposal, e.g. storyboards, maquettes; gaining approval; consistency with branding and marketing mix elements.

- Producing a promotional plan: timescale, print deadlines, shoot times, campaign duration; frequency of activity; budget; link between plan and promotional objectives, marketing objectives and corporate objectives.

- Monitoring marketing activity, e.g. 'web metrics', audience response, impact on business performance indicators; control measures for promotional activity, e.g. responding to unsuccessful promotional activity.

C4 Ethical and legal dimensions of promotional activities

- Laws relating to selling, e.g. consumer protection, sale of goods; codes of practice; Direct Marketing Association, Advertising Standards Authority.

- Ethical considerations, e.g. 'lifestyle' promotions, impact on vulnerable consumers; ethics and morals, e.g. maximising profits versus protecting consumers.

- Effects of compliance and non-compliance, consideration of moral grey areas, e.g. controversial promotion as a public relations technique.

Essential information for assessors

Essential resources

For this unit, learners must have access to a range of current business information on websites and from printed resources.

Suggested assessment approach

This section must be read in conjunction with *Section 6 Assessment*.

This unit is assessed internally by the centre and externally verified by Pearson.

The table below shows the suggested approach to assessments.

The assessment for this unit should be set in a specific organisational context, it should draw on learning from the unit, and be designed in a way that enables learners to meet all the assessment criteria.

Learning aim	Suggested assessment approach
A Explore the role of integrated marketing communications in creative promotion	A report on the role of integrated marketing communication activities used in a range of different businesses.
B Review the effectiveness of the promotional mix used by different businesses	A report on the effectiveness of the promotional activities used by different businesses, comparing the campaign plan produced by learners to other businesses. Learners will produce and present a proposal for a promotional campaign, showing how appropriate communication methods will be utilised in order to meet the needs of customers. The plan will be fully costed and the learner will show how they intend to spend their budget on different activities. Learners will need to produce examples of proposed promotional materials in their presentation.
C Create a plan for a promotional campaign.	

Assessment requirements

Learning aim A

To achieve Pass standard, learners will explain why promotional activities are important to contrasting businesses, with some discussion of how and why these activities are undertaken.

To achieve Merit standard, learners will have to analyse how effective the selected promotional activities of contrasting businesses are and give some examples of where this has been achieved.

To achieve Distinction standard, learners will evaluate from their investigations how far a business's promotional activities are able to support business objectives. They will research the contrasting promotional activities of a suitable, local (or other) business and investigate the techniques and methods used. The work will be illustrated with examples of good practice, and reasoned conclusions will be drawn on the effectiveness of the chosen promotional activities.

Learning aims B and C

To achieve Pass standard, learners will cover how different businesses use promotional campaigns and understand the promotional mix. They will identify a target market and produce and present a costed creative plan for a chosen business that shows understanding of the need to meet the demands of the chosen market.

To achieve Merit standard, learners will analyse factors that influence the choice of the investigated promotional activities. The work will use examples indicating an understanding of the promotional mixes described. Learners will produce and present a creative plan for a promotional campaign using examples that show how this meets both business and consumer needs.

To achieve Distinction standard, learners will evaluate the effects of internal and external influences on promotional activities used by contrasting businesses to contribute to the achievement of business aims. The work will be illustrated with reference to successful promotional activities/campaigns. Learners will produce, and present individually, a creative plan for a promotional campaign demonstrating individuality in evaluation, thought and skill, as well as reaching justified conclusions on the plan itself and/or possible revision. This will be evidenced by an observation statement.

Unit 8: Pitching for a New Business

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

Learners study the practical skills and acquire the knowledge needed to undertake the necessary preparation and steps to set up and pitch for funding for a micro-business.

Unit introduction

Entrepreneurs explore potential business opportunities, select viable business ideas, prepare appropriate business plans and pitch these to potential investors. This unit will teach you how to carry out these steps which are critical to the development of new businesses.

This unit focuses upon pitching a new business idea for a micro-business – a business employing less than 10 people. This could be a business you want to start up yourself or in partnership with others. In this unit, you will investigate a potential micro-business idea and outline a business plan. You will present your business plan to potential investors with a view to securing appropriate funding. It is important that you are able to recognise what should be included in a pitch and how the process of idea formulation, selection, planning and presentation should be managed in order to secure funding.

This unit will develop the skills needed if you decide to set up your own business, or if you want to work in or study further a sector or area that needs entrepreneurial or innovative skills.

Learning aims and grading criteria

To achieve a **Pass** grade for the unit, learners must achieve all **pass** criteria.
To achieve a **Merit** grade, learners must achieve all **pass and merit** criteria.
To achieve a **Distinction** grade, learners must achieve all **pass, merit and distinction** criteria.

Pass	Merit	Distinction
Learning aim A: Explore potential ideas for a micro-business start-up		
A.P1 Describe the potential business opportunities for a micro-business start-up. **A.P2** Review the factors that need to be considered to start up a micro-business.	**A.M1** Analyse the internal and external factors associated with a selected micro-business start-up.	**A.D1** Evaluate the internal and external factors associated with a selected micro-business start-up.
Learning aim B: Develop a business plan for a viable micro-business start-up		
B.P3 Explain your marketing plan for a selected micro-business. **B.P4** Explain how legal and financial aspects will affect the start-up of the business.	**B.M2** Analyse the financial and marketing plans for your micro-business.	**B.D2** Evaluate your plan for a micro-business and justify your conclusions.
Learning aim C: Carry out a pitch for funding for the chosen micro-business		**C.D3** Demonstrate individual responsibility and effective self-management in the preparation, delivery and review of the presentation of a high-quality pitch.
C.P5 Pitch for funding to start up a micro-business. **C.P6** Review the viability and risks of the start-up using audience feedback.	**C.M3** Effectively present an individual pitch to negotiate funding for a micro-business start-up, analysing audience feedback and viability issues.	

Unit content

Learning aim A: Explore potential ideas for a micro-business start-up

A1 Exploration of ideas for a micro-business start-up

- Idea generation for new products, services and/or market for business opportunities.

- Decision matrix: generation of selection criteria and scoring for business opportunities.

- The application of business model canvas: activities; customer relationships; customer segments; key partners; value proposition; resources; cost structure; channels; revenue streams.

A2 Models for business opportunities

- Business activity: primary, secondary or tertiary sector of activity.

- Processes: manufacturing, outsourcing, sourcing, channels to market.

- Organisational form: structure, roles and responsibilities.

A3 Factors to be considered when setting up a micro-business

- Capability and core competencies.

- Time constraints.

- Financial constraints.

- Potential stakeholder influences.

- Access to physical resources.

- Availability of IT.

- Environmental influences.

- Internal risks.

- External risks

Learning aim B: Develop a business plan for a viable micro-business start-up

B1 Market analysis and planning

- Target market definition.

- Secondary and primary research including government reports, customer focus groups, interviews, online questionnaires.

- Business environment: Porter and PESTLE.

- Marketing mix.

- Unique selling points (USPs).

B2 Legal aspects

- Business legal form and liability insurance.

- Consumer protection legislation.

- Employment legislation.

- Health and safety legislation.

- Data protection legislation.

- Environmental protection legislation.

B3 Financial aspects

- Pricing policy.

- Sales forecasts.

- Projected costs: set-up, fixed and variable costs.

- Break-even forecast.

- Cash flow forecast.

- Forecast opening and closing statement of financial position, capital structure to show investment necessary from potential investors.

- Forecast statement of comprehensive income for trading period.

B4 Evaluation

- Marketing mix SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis.

- Financial forecasts, including liquidity analysis, profitability analysis, sensitivity analysis.

Learning aim C: Carry out a pitch for funding for the chosen micro-business

C1 Documents and materials for pitch to audience

- Appropriate documents and materials that are detailed, appropriate, and relate to individual business proposal including business plan, cost structure, market research data, marketing plan, competitor analysis, risk analysis.

- Documentation to support funding investment including draft profit and loss statement, figures for gross and net profit margins, potential return on investment.

- Evidence of exploration of potential questions and answers from potential investors, including risk, expectations for return, share of ownership in the business.

C2 Professional presentation skills demonstrated in the pitch

- Presentation, behaviour and conduct of presenter, e.g. attire, attitude, business-like skills, suitable for audience, well prepared.

- Negotiation and communication skills.

C3 Review and evaluation of the pitch

- Receive feedback on the business content of the pitch, analyse feedback and make amendments accordingly.

Essential information for assessors

Essential resources

For this unit, learners must have access to a range of current business information on websites and from printed resources.

Suggested assessment approach

This section must be read in conjunction with *Section 6 Assessment*.

This unit is assessed internally by the centre and externally verified by Pearson.

The table below shows the suggested approach to assessments.

The assessment for this unit should be set in a specific organisational context, it should draw on learning from the unit, and be designed in a way that enables learners to meet all the assessment criteria.

Learning aim	Suggested assessment approach
A Explore potential ideas for a micro-business start-up	A portfolio comprising research, analysis and risk evaluation that collectively supports a specific recommendation for setting up a new micro-business.
B Develop a business plan for a viable micro-business start-up	A portfolio comprising research, analysis and risk evaluation that collectively supports a specific recommendation for setting up a new micro-business.
C Carry out a pitch for funding for the chosen micro-business	

Assessment requirements

Learning aim A

To achieve Pass standard, learners will research a new business and the model outlined. Details of the activity and its processes, and the business form, will be evidenced in the portfolio. At least four factors will be explained. If learners work in groups to research and explore, work must be submitted individually in a professional portfolio. As this is for a micro-business, the choice of business should be a small entity that does not require more than four employees to start it up.

To achieve Merit standard, learners will analyse the internal and external factors, ensuring there is a good range and noting that some factors and risks will affect some types of business and not others.

To achieve Distinction standard, learners will evaluate a range of internal and external factors for the small business start-up, along with how they can be a risk to the new business (at least four factors and four risks will be evaluated).

Learning aims B and C

Professional business language will be used and data must be realistic for the business. Learners will be encouraged to create their own plan template for the business plan. If learners work in groups, the group size should not exceed four. An individual plan is required in the portfolio. Learners will need to pitch their plan to an informed audience, ideally a panel of local business people, staff and peers. It should be organised formally as if in the workplace. Witness statements will be produced and included in the learner's portfolio.

To achieve Pass standard, learners will design a coherent plan, comprising key sections, including legal and financial, supported with research. Learners will present their plan individually and will be able to answer questions on their plan asked by the panel.

To achieve Merit standard, learners will show the range of financial statements and the marketing mix will be analysed, clearly demonstrating how sales figures were arrived at. All costs will be realistic for the size of the business. Learners will need to present a professional, individual pitch and analyse the feedback from the panel and viability issues.

To achieve Distinction standard, learners will show clear justification of the plan, giving reasons for all of its elements. A SWOT and sensitivity analysis will be used, together with a ratio analysis to give an evaluation of predicted success. Learners will present their plan individually. They will have used initiative and creativity in their pitch presentation, demonstrating a high standard of individual technical ability, attention to detail, innovation and precision.

Unit 9: Business Ethics

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

Learners develop an understanding of how organisations promote ethical behaviour in the workplace and consider the business case for implementing socially-responsible business practices.

Unit introduction

Business organisations are aware that the behaviour of consumers is increasingly influenced by the organisation's ethical behaviour, the way it conducts its working relationships, and how far it recognises the impact of its activities in a wider social and environmental context. To remain competitive in this environment, business organisations need to demonstrate high standards of ethical business behaviour and take account of the social and environmental impact of their production processes. In this unit, you will consider a business organisation's relationship with its internal and external stakeholders from the perspective of business ethics and corporate social responsibility (CSR). You will explore the nature of ethical behaviour in a business context and the impact of business ethics on costs, operations, and the roles and responsibilities of managers and employees in the workplace. You will also examine the role and importance of CSR and how it influences an organisation's relationship with stakeholders in the wider external business environment. This unit will help you progress to higher education courses exploring business ethics and CSR, and will enable you to make an informed choice of suitable CSR organisations for employment.

Learning aims and grading criteria

To achieve a **Pass** grade for the unit, learners must achieve all **pass** criteria.
To achieve a **Merit** grade, learners must achieve all **pass and merit** criteria.
To achieve a **Distinction** grade, learners must achieve all **pass, merit and distinction** criteria.

Pass	Merit	Distinction
Learning aim A: Understand how ethical behaviour is applied in a business context		
A.P1 Explain the concept of business ethics and how they are embedded in industry and professional codes of practice. **A.P2** Explain the practical application and impact of business ethics on business organisations and their employees.	**A.M1** Analyse the concept, application and impact of ethics in relation to business operations, and the behaviours of employees.	**AB.D1** Evaluate business operations, and the behaviours of employees, in relation to the concept, application and impact of business ethics.
Learning aim B: Understand how corporate social responsibility is applied in a business context		
B.P3 Explain the concept and features of corporate social responsibility. **B.P4** Explain the benefits and drawbacks for different businesses implementing corporate social responsibility.	**B.M3** Assess the nature and impact of corporate social responsibility for different businesses.	**B.D2** Evaluate the effectiveness of different businesses' approaches to implementing corporate social responsibility policies.
Learning aim C: Investigate the impact of ethical and corporate social responsibility issues on business practices		
C.P5 Explain the impact of a business disaster on an organisation and its key stakeholders. **C.P6** Explain the effectiveness of an organisation's response to a business disaster.	**C.M4** Analyse the effectiveness of an organisation's response to a business disaster.	**C.D3** Critically evaluate the effectiveness of an organisation's response to a business disaster.

Unit content

Learning aim A: Understand how ethical behaviour is applied in a business context

A1 Features of business ethics

- Definition of business ethics and characteristics and features of operating ethically in a business environment, to include:
  - business concepts of honesty and integrity
  - fairness and inclusion in a competitive business environment
  - concepts of respect and trust in relation to customers, stakeholders, competitors, the general public
  - legal governances and obligations in ethics.
- The influence of business ethics on corporate image to include:
  - vision statement
  - value statements
  - mission statements.

A2 Industry and professional codes of practice

- Examples, purpose and features of industry codes of practice, including:
  - mandatory and voluntary codes of practice
  - sanctions.
- Examples, purpose and features of professional codes of practice:
  - examples, e.g. ACCA Global and the Chartered Insurance Institute (CII) International Code of Ethics, The International Ethics Standards Board for Accountants (IESBA)
  - features, e.g. integrity, objectivity, professional competence, confidentiality, professional behaviour
  - sanctions.

A3 The application of ethical values to business practices Features and characteristics of ethical and unethical practices in business organisations.

- Corporate governance and executive pay:
  - division of responsibilities, divorce of ownership and control
  - decision-makers have the requisite skills, principal agent problem
  - identification of risk
  - appropriate internal checks and controls, e.g. remuneration committees.
- Financial responsibilities:
  - responsibility to pay taxes promptly/tax avoidance
  - corrupt practices, including bribery and fraud
  - excessive remuneration, severance packages and corporate bonus systems.
- Employment and diversity policies:
  - promotion of diversity in the workplace
  - inclusion and equal opportunities in all areas of the organisation, from recruitment to promotion, and training opportunities

health and safety responsibilities.

- Organisations promoting ethical business behaviour:
  - international, e.g. Institute of Business Ethics, Fairtrade Foundation
  - national, e.g. Investors in People, FTSE4Good, Business in the Community
  - professional associations and institutes; trade unions.
- Potential business risks if ethical issues and considerations are not addressed:
  - legal, e.g.
    - consumer protection
    - employment practices
    - data protection
    - health and safety
  - financial, e.g.
    - sales and market share
    - profitability and financial performance
    - share price and company value
  - reputational, e.g.
    - consumer feedback
    - impact on the environment.

A4 Business ethics and the individual

- Influence of ethics on the behaviour of individuals, e.g. CEOs, employees, business owners.
- Strategies for promoting ethical behaviour in an organisation's workforce, to include:
  - contracts of employment
  - induction and ongoing training
  - codes of conduct
  - professional qualifications
  - ethical ambassadors
  - disciplinary sanctions.
- Discretionary decisions in job roles that may involve ethical considerations by an employee, to include:
  - remuneration and sales practices
  - dealing with the unethical behaviour of work colleagues
  - management and supervision of others.

Learning aim B: Understand how corporate social responsibility is applied in a business context

B1 CSR issues and the impact on stakeholders

- Definition of CSR.

- Impact of CSR initiatives on key stakeholder groups, including employees.

- Customers, suppliers, governments, local communities.

- Characteristics and purpose of CSR reports/social audits for:
  - internal stakeholders
  - external stakeholders.

B2 Sustainability and the triple bottom line

Consideration of the three principles of the triple bottom line, i.e. financial, social and environmental, when applied to business decisions in terms of sustainability.

- Environmental issues:
  - waste reduction and recycling
  - sustainability of resources
  - carbon and pollution reduction initiatives.

- Consumer protection statutory and legal requirements:
  - misleading or inappropriate advertising and false descriptions
  - effect of products on consumer health, e.g. product safety and food labelling.

- Supply chain and community statutory and legal requirements:
  - fair treatment and working conditions of employees of key suppliers
  - minimum/living wage for both own and supplier workforces
  - restrictive trading practices.

B3 Promoting business ethics and CSR policies

The benefits and drawbacks of applying business ethics and CSR in different types of organisation, including sole traders, companies owned by shares and multinational corporations.

- Financial benefits:
  - financial performance, e.g. increased sales volume and value, profitability, liquidity, efficiency share price and company value
  - access to loans and grants o ability to charge premium prices
  - risk reduction.

- Non-financial benefits:
  - improved customer loyalty and retention, positive brand image and social media profile
  - enhanced HR practices, including recruitment, motivation and staff retention
  - quality kite mark recognition and assured standards, and the impact on best practice promoting organisational change.

- Drawbacks of applying business ethics and CSR in different types of organisation, including sole traders, companies owned by shares and multinational corporations, including:
  - opportunity cost implications of implementing policies in relation to the business objectives of large and small businesses
  - impact on business strategy, e.g. distraction from core business objectives
  - cost versus benefit analysis of CSR, e.g. membership costs and recognition costs of professional bodies, monitoring costs, administration costs, additional direct and indirect staffing costs, including training costs, public perceptions of 'green washing'.

Learning aim C: Investigate the impact of ethical and corporate social responsibility issues on business practices

C1 Strengthening a business organisation's CSR image

Implementation of ethical behaviour and CSR initiatives in different business contexts, including small and large firms operating in different sectors of the economy.

- Internal environment:
  - HR practices, including the promotion of diversity and inclusion in recruitment practices, training opportunities and initiatives aimed at enhancing career pathways for under-represented groups
  - sustainable production, e.g. product innovation, procurement, energy utilisation.
- External environment: o transparency with consumers, e.g. marketing, sales promotions
  - transparency in financial matters, e.g. payment schedules and costs
  - education and support for the local community, e.g. sponsorships, charitable donations, environmental initiatives.
- Impact and consequences of activities that result in social and environmental costs:
  - public image and perceptions, e.g. TV and press coverage
  - financial implications, e.g. lower sales, fall in share price and compensation payments
  - legal implications, e.g. fines
  - government intervention to address unethical business practices, e.g. mis-selling of financial products.

C2 Organisational responses to addressing ethical and CSR issues

- Strategies available to address social and environmental costs using business communications strategies, e.g. press releases, press conferences, social media campaigns, advertisements.

- Community engagement, e.g. meeting with local community groups and their representatives.

- Changes to business practices, e.g. changes to production schedules, employment practices, changes in personnel and procurement systems.

- Financial compensation, e.g. payments to affected stakeholders.

C3 Reviewing business practices in relation to disaster recovery

Methods and approaches to critically reviewing the effectiveness of organisational response to business disasters impacting public perception of business ethics and corporate social responsibility.

- Public perception of impact of business disaster:
    - news media articles
    - pressure group activity, e.g. Plastic Pollutes, Greenpeace, Stop Child Labour Campaign
    - boycotting or withdrawal of custom
    - protests, e.g. social media campaigns, online petitions.
- Review of organisational response information in the public domain, e.g. policy changes, press releases/interviews, rebranding.
- Review of organisational response practices, e.g. personnel changes, compensation payments, remedial action, changes to working methods.
- Evaluating organisational responses and effectiveness:
    - scale of response against scale of disaster
    - language of communications, e.g. apologetic, evasive, defiant
    - effectiveness of policy changes, including short-term, long-term
    - evidence of change, or willingness to change working practices
    - reduction in negative publicity in media
    - public response to organisational response, e.g. returning custom, reduction in protest.

Essential information for assessors

Essential resources

For this unit, learners must have access to information on a range of businesses, including local, national and international.

Suggested assessment approach

This section must be read in conjunction with *Section 6 Assessment*.

This unit is assessed internally by the centre and externally verified by Pearson.

The table below shows the suggested approach to assessments.

The assessment for this unit should be set in a specific organisational context, it should draw on learning from the unit, and be designed in a way that enables learners to meet all the assessment criteria.

Learning aim	Suggested assessment approach
A Understand how ethical behaviour is applied in a business context	An investigative report profiling the way in which ethical and CSR initiatives are implemented by two different organisations.
B Understand how corporate social responsibility is applied in a business context	
C Investigate the impact of ethical and corporate social responsibility issues on business practices	A critical review of the response of an organisation to a business disaster resulting from unethical business practices or deficiencies in its CSR.

Assessment requirements

Learning aims A and B

To achieve Pass standard, learners must demonstrate an understanding of the main ethical considerations faced by each business organisation and the potential risks if ethical business standards are not maintained. These could include the potential ethical issues that may be faced by employees in their work roles in each organisation. Learners identify the common features of CSR practices and highlight the business considerations that need to be taken into account when implementing CSR initiatives. Learners will differentiate between ethical practices and CSR initiatives, and highlight some of the financial and non-financial benefits for each organisation in respect of its ethical and CSR practices. Responses will be generally accurate with each of the points addressed to some extent.

To achieve Merit standard, learners must consider a broad range of business risks and show how different business practices relating to ethics and CSR initiatives can impact business stakeholders. They will discuss the application of standards of ethical behaviour in respect of individuals and show how these standards are applied in different functional areas within the business organisation. Learners will show a clear distinction between the operating practices of different organisations.

To achieve Distinction standard, learners must differentiate between the different types of business risk. They will show clearly how specific ethical business practices in relation to both the individual employee and the functional areas within the organisation, along with CSR initiatives, can all serve to reduce the direct and indirect financial impact of business risks. Learners will be able to identify and justify good practice in an organisation in respect of ethical behaviour and CSR. The impact of ethical standards and CSR initiatives will be considered with regards to a wide range of different business stakeholders.

Learning aim C

To achieve Pass standard, learners must carry out research on a specific business to identify examples of how it promotes ethical behaviour and CSR. Learners must show an understanding of situational analysis by researching how the business dealt with a major disaster that involved its ethical and corporate social responsibilities. For example, the disaster could be an issue relating to the environment, its trading practices or its production processes. Learners provide a summary of the main issues involved, including the impact of the disaster on the business. Learners will highlight how the business dealt with the disaster and provide a personal judgement of how far they consider the business met its ethical and corporate social responsibility obligations.

To achieve Merit standard, learners must show a detailed understanding of how a business's actions support its ethical and CSR policies and public statements. Learners will identify the financial and non-financial costs of ethical practices and CSR initiatives. They will demonstrate a thorough understanding of situational analysis to identify the impact of a business disaster on key stakeholder groups and how this affects business operations, clearly distinguishing between financial and non-financial outcomes. Learners will undertake an assessment of the costs involved in dealing with the disaster in relation to the needs and interests of different stakeholder groups. Learners will draw

valid conclusions of how the business dealt with the disaster based on an analysis of stakeholder views.

To achieve Distinction standard, learners must show an in-depth understanding of situational analysis to undertake relevant research showing the relationship between a business's CSR policy objectives and its business practices. Learners will demonstrate an understanding of the complex relationship between business ethics and the application of CSR initiatives in a competitive business environment, clearly distinguishing between the costs and benefits of these initiatives in relation to identified business risks. Learners must produce relevant evidence of the way in which a business handles its relationship with key stakeholders when dealing with ethical and CSR issues. Learners will identify the conflicts that arise when attempting to meet the competing needs and interests of different stakeholder groups, highlighting any practices that may contradict the business's stated value statements and CSR objectives. Learners must draw conclusions based on an analysis of stakeholder views and present their own balanced view based on the outcome of their individual research.

5   Program delivery

Centres are free to offer these qualifications using any mode of delivery that meets learners' needs. This might include full time or part time direct instruction in classrooms, distance learning, and directed self-study.

Centres must make sure that learners have access to the identified resources and to the subject specialists delivering the units.

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

- developing up-to-date and relevant teaching materials that make use of scenarios or case studies that are relevant to the sector

- giving learners the opportunity to apply their learning in realistic practical activities, for example creating business documentation or performing role plays

Where legislation is taught, centres must ensure that it is current and up to date.

6 Assessment

To achieve a pass for this qualification, the learner must achieve all the units required in the qualification structure.

Internal assessment

All units in this qualification are internally assessed. This means that centres set and mark the assessments, which are then subject to external standards verification by a Pearson standards verifier.

Assessment using assignments

For all units, the format of assessment is an assignment taken after the content of the unit has been delivered. An assignment may take a variety of forms, including practical and written. Assignments are separate from teaching, practice, and other activities that learners complete with input from teachers. Assignments must be completed independently by learners, which means they work on their own without input from other learners or teachers.

An assignment needs to be issued to learners as an assignment brief which includes a start date, a completion date and clear requirements for the evidence that they need to provide. Assignments should be set within a specific organisational context. Assignments can be divided into tasks and may require several forms of evidence, including written tasks and observations.

Teachers will set the assignments. They must allow learners to generate the evidence required to meet all of the pass, merit and distinction grading criteria and the *Essential Requirements for Assessors* for the unit. In *Appendix 1: Glossary of terms used*, we have set out a definition of terms used in the grading grids.

To achieve a Pass, learners must achieve all of the Pass criteria.

To achieve a Merit, learners must achieve all of the Pass and Merit criteria.

To achieve a Distinction, learners must achieve all of the Pass, Merit and Distinction criteria.

Issuing assessment decisions and feedback

Once the assessor 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 achievement of assessment criteria has not been demonstrated

- must not provide feedback on how to improve evidence

- must be validated by an Internal Verifier before it is given to the learner.

Resubmissions and retakes

Learners who do not successfully pass an assignment are allowed one opportunity to resubmit evidence for this assignment. If they still do not reach the required standard, they should be given one opportunity to retake a different assignment that covers the same learning aim(s).

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 and Programme Leaders.

Learner registration and entry

Shortly after learners start the programme of learning, you need to make sure that they are registered for the qualification. 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.

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

- learners with a protected characteristic 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 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 is assessed. 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 allowing the use of assistive technology or adjusting the format of evidence. Any reasonable adjustment must reflect the normal learning or working practice of a learner in a centre or working within the occupational area. We can advise you if you are uncertain as to whether an adjustment is fair and reasonable. You need to plan for time to make adjustments if necessary.

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

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*.

Dealing with malpractice in assessment

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

Pearson does not tolerate actual 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 malpractice or attempted malpractice has been proven.

Malpractice may occur or be suspected in relation to any unit or type of assessment within a qualification. For further details on malpractice and advice on preventing

malpractice by learners, please see Pearson's *Centre Guidance: Dealing with Malpractice*, available on our website.

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

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

Pearson may conduct investigations if we believe 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

The head of centre is required to report incidents of suspected learner malpractice that occur during Pearson qualifications. We ask centres to complete JCQ Form M1 (www.jcq.org.uk/malpractice) and email it with any accompanying documents (signed statements from the learner, invigilator, copies of evidence, etc.) to the Investigations Processing team at candidatemalpractice@pearson.com. The responsibility for determining appropriate sanctions or penalties to be imposed on learners lies with Pearson.

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

Failure to report malpractice constitutes staff or centre malpractice.

Teacher/centre malpractice

The head of centre is required to inform Pearson's Investigations team of any incident of suspected malpractice (which includes maladministration) by centre staff, before any investigation is undertaken. The head of centre is requested to inform the Investigations team by submitting a JCQ M2 Form (downloadable from www.jcq.org.uk/malpractice) with supporting documentation to pqsmalpractice@pearson.com. Where Pearson receives allegations of malpractice from other sources (for example Pearson staff, anonymous informants), the Investigations team will conduct the investigation directly or may ask the head of centre to assist.

Pearson reserves the right in cases of suspected malpractice to withhold the issuing of results/certificates while an investigation is in progress. Depending on the outcome of the investigation, results and/or certificates may not be released or they may be withheld.

We reserve the right to withhold certification when undertaking investigations, audits and quality assurance processes. You will be notified within a reasonable period of time if this occurs.

Sanctions and appeals

Where malpractice is proven, we may impose sanctions or penalties, such as:

- mark reductions for affected external assessments

- disqualification from the qualification

- debarment 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 centres to create an improvement action plan

- requiring staff members to receive further training

- placing temporary blocks on the centre's 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 the head of centre (on behalf of learners and/or members or staff) and from individual members (in respect of a decision taken against them personally). Further information on appeals can be found in the JCQ Appeals booklet (https://www.jcq.org.uk/exams-office/appeals).

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*.

The qualification and units will be graded Pass, Merit or Distinction on the accompanying notification of performance if they are completed successfully.

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.

- *Pearson 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 access to 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.

Continuing quality assurance and standards verification

On an annual basis, we produce the *Pearson 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

- 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 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 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 this qualification is 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 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*
- achieve the **minimum number of points** at a grade threshold.

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

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 units, the units with the highest grades, will be used to calculate the overall result, subject to the eligibility requirements.

This BTEC International Level 3 Specialist qualification is awarded at the grade range shown in the table below.

Qualification	Available grade range
Diploma (630 GLH)	P to 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.

	Unit size		
	60 GLH	**90 GLH**	**120GLH**
U	0	0	0
Pass	6	9	12
Merit	10	15	20
Distinction	16	24	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.
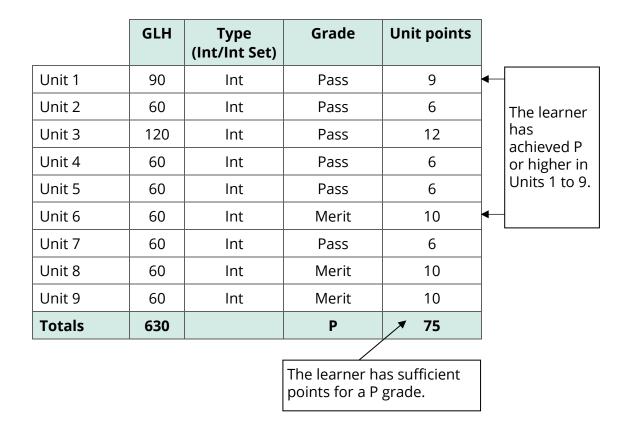
Calculation of qualification grade

Specialist Diploma	
630 GLH	
Grade	**Points threshold**
U	0
P	63
M	90
D	127
D*	158

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 September 2022

Example 1: Achievement of a Specialist Diploma with a P grade

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	90	Int	Pass	9
Unit 2	60	Int	Pass	6
Unit 3	120	Int	Pass	12
Unit 4	60	Int	Pass	6
Unit 5	60	Int	Pass	6
Unit 6	60	Int	Merit	10
Unit 7	60	Int	Pass	6
Unit 8	60	Int	Merit	10
Unit 9	60	Int	Merit	10
Totals	**630**		**P**	**75**

The learner has achieved P or higher in Units 1 to 9.

The learner has sufficient points for a P grade.

Example 2: Achievement of a Specialist Diploma with a D grade

	GLH	Type (Int/Int Set)	Grade	Unit points
Unit 1	90	Int	Distinction	24
Unit 2	60	Int	Distinction	16
Unit 3	120	Int	Distinction	24
Unit 4	60	Int	Distinction	16
Unit 5	60	Int	Distinction	16
Unit 6	60	Int	Merit	10
Unit 7	60	Int	Distinction	16
Unit 8	60	Int	Merit	10
Totals	**720**		**U**	**132**

The learner has achieved M or higher in Units 1 to 9.

10 Resources and support

Our aim is to give you a wealth of resources and support to enable you to deliver BTEC International Specialist and Professional 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 September 2022) 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 Specialist Diploma in International Event Management and Marketing Studies qualification. It supports delivery, assessment and quality assurance of BTECs in centres and supports teachers and learners 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 Specialist and Professional 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 Diploma in International Event Management and Marketing Studies qualification, 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.

Support for assessment

Sample assessment materials for internally-assessed units

For 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, 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

Pearson
BTEC