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LEVEL 3  
FOUNDATION  
TECHNICAL LEVEL  
**BUSINESS:  
MARKETING  
COMMUNICATIONS**

360 GLH (TVQ01021)

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LEVEL 3  
TECHNICAL LEVEL  
**BUSINESS:  
MARKETING**

720 GLH (TVQ01020)

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**Specifications**

First registration September 2016 onwards

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Version 5.1 November 2018



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# 1 About these qualifications

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These qualifications are Advanced (Level 3) Technical qualifications, on a par with A-levels and have been built in close collaboration with employers and professional bodies ensuring that they have both recognition and value.

They are for learners over the age of 16 who wish to specialise or progress into a specific sector or specific occupational group, through advanced/higher apprenticeships, further study or employment.

Transferable skills (sometimes known as 'soft skills') have been contextualised explicitly within the content of each qualification. These transferable skills have been prioritised by employers and professional bodies in this sector and are a mandatory part of the qualification outcome. It is important to note that learners **must** demonstrate successful achievement of the identified transferable skill(s) appropriate to the qualification on at least **one** occasion to the required standard.

The Statements of purpose (pages 12 and 17) give more detail on the likely progression for learners with these qualifications.

Each qualification is one of the three components of the new Technical Baccalaureate (TechBacc).

The TechBacc is a performance table measure which recognises the highest level of technical training. It recognises the achievement of learners taking a Technical Level qualification, a Level 3 maths qualification and an Extended Project Qualification (EPQ).

## 2 Qualifications at a glance – overview

### 2.1 Level 3 Foundation Technical Level Business: Marketing Communications

Ofqual qualification number	601/7147/9	AQA qualification number	TVQ01021
First registration date	1 September 2016	Age range	16–18, 19+
Last registration date	30 August 2020	UCAS points	Information on UCAS points can be obtained from <a href="https://ucas.com">ucas.com</a>
Last certification date	30 August 2023	Performance table points	Information on performance measures can be found at: <a href="https://education.gov.uk">education.gov.uk</a>
Total qualification time (TQT)	380 (GLH = 360) (See TQT section for more information)	Eligibility for funding	Yes
Unit weighting Externally assessed Internally assessed	25% each unit (both internal and external units)	Entry requirements	There are no formal entry requirements for this qualification set by AQA.

Mandatory units	All units in this qualification are mandatory.
Resits, resubmissions and retakes	<p>The learner is permitted one resit/retake in relation to each unit of the qualification.</p> <p>Where a unit is examined/externally assessed, this means one resit. Where a unit is internally assessed and externally quality assured, this means one retake.</p> <p>Resits, resubmissions and retakes are each permitted where learners have both failed the requirements of the unit and where the learner wishes to improve on a grade received.</p> <p>Any resubmission of an assignment (ie a second attempt at an internally assessed unit task/assignment prior to external quality assurance) must be undertaken without further guidance from the tutor and must be completed within a defined and reasonable period of time following the learner receiving their initial result of the assessment.</p>

Assessment model	This qualification contains externally assessed and internally assessed units. Internally assessed units are externally quality assured by AQA.	Examination sessions	January and June each year.
Employer involvement during delivery	It is a requirement that employers are engaged meaningfully in the delivery of this qualification. Further information on this can be found in the individual units (where relevant) and the Meaningful employer involvement section.		
Grading	<p>The units are graded Pass, Merit or Distinction</p> <p>The overall qualification is graded as P, M, D, D*</p>		

### Transferable skills contextualised within the units of this qualification

These are the skills deemed essential by the employers and professional bodies AQA has collaborated with on the development of this qualification. We have contextualised units around these 'soft' skills. There may be more than one opportunity for each transferable skill to be evidenced to the required standard across the units within the qualification. It is important to note that learners **must** demonstrate successful achievement of the identified transferable skill(s) appropriate to the qualification on **one** occasion to the required standard in the identified unit(s). Evidence produced for the transferable skills will be internally assessed and externally quality assured.

- Communication (oral)
- Research



## 2.2 Level 3 Technical Level Business: Marketing

Ofqual qualification number	601/7148/0	AQA qualification number	TVQ01020
First registration date	1 September 2016	Age range	16–18, 19+
Last registration date	30 August 2020	UCAS points	Information on UCAS points can be obtained from <a href="https://ucas.com">ucas.com</a>
Last certification date	30 August 2023	Performance table points	Information on performance measures can be found at: <a href="https://education.gov.uk">education.gov.uk</a>
Total qualification time (TQT)	760 (GLH = 720) (See TQT section for more information)	Eligibility for funding	Yes
Unit weighting Externally assessed Internally assessed	12.5% each unit (both internal and external units)	Entry requirements	There are no formal entry requirements for this qualification set by AQA.

Mandatory units	All units in this qualification are mandatory.
Resits, resubmissions and retakes	<p>The learner is permitted one resit/retake in relation to each unit of the qualification.</p> <p>Where a unit is examined/externally assessed, this means one resit. Where a unit is internally assessed and externally quality assured, this means one retake.</p> <p>Resits, resubmissions and retakes are each permitted where learners have both failed the requirements of the unit and where the learner wishes to improve on a grade received.</p> <p>Any resubmission of an assignment (ie a second attempt at an internally assessed unit task/assignment prior to external quality assurance) must be undertaken without further guidance from the tutor and must be completed within a defined and reasonable period of time following the learner receiving their initial result of the assessment.</p>

Assessment model	This qualification contains externally examined and internally assessed units. Internally assessed units are externally quality assured by AQA.	Examination sessions	January and June each year.
Employer involvement during delivery	It is a requirement that employers are engaged meaningfully in the delivery of this qualification. Further information on this can be found in the individual units (where relevant) and the Meaningful employer involvement section.		
Grading	<p>The units are graded Pass, Merit or Distinction</p> <p>The overall qualification is graded as PP, MP, MM, DM, DD, D*D, D*D*</p>		

### Transferable skills contextualised within the units of this qualification

These are the skills deemed essential by the employers and professional bodies AQA has collaborated with on the development of this qualification. We have contextualised units around these 'soft' skills. There may be more than one opportunity for each transferable skill to be evidenced to the required standard across the units within the qualification. It is important to note that learners **must** demonstrate successful achievement of the identified transferable skill(s) appropriate to the qualification on **one** occasion to the required standard in the identified unit(s). Evidence produced for the transferable skills will be internally assessed and externally quality assured.

- Teamwork
- Communication (oral and written)
- Research

# 3 Level 3 Foundation

## Technical Level Business:

### Marketing Communications:

#### Statement of purpose

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### 3.1 Qualification objective

The objective of this qualification is:

- preparing learners to progress to a qualification in the same subject area but at a higher level or requiring more specific knowledge, skills and understanding
- meeting relevant programmes of learning
- preparing learners for employment
- giving learners personal growth and engagement in learning.

### 3.2 Who is this qualification for?

This technical level qualification is aimed at 16 to 18 year old learners who are seeking to develop skills and knowledge in both business and marketing communications for entry into marketing and sales support roles.

The qualification also prepares learners for broader study within the field of marketing and the AQA Level 3 Technical Level qualification in Business: Marketing.

There are no formal entry requirements for this qualification but to optimise their chances of success, learners will typically have five GCSE's at A\* to C, preferably including English and Maths. Achievement in a creative subject such as art or media would also be beneficial.

This qualification could be taken alongside other Level 3 qualifications such as IT, graphics, sociology, psychology, for those who seek a career in research.

It can form part of a study programme, Technical Baccalaureate and would benefit from being studied alongside an Applied General, A-level or EPQ.

### 3.3 What does this qualification cover?

All of the units in this qualification are mandatory and will provide the essential marketing communications technical knowledge and skills required for starting a marketing/sales support role.

The learner will cover topics such as:

- an introduction to the establishment, growth and survival of a business
- key concepts and terminology of marketing and how it fits within the organisation
- main elements of marketing communications, customer relationship management, communications methods and tools, development of an outline marketing communications campaign
- key concepts associated with digital marketing.

This qualification has been developed with the Chartered Institute of Marketing (CIM) who have created professional standards in partnership with employers.

Transferable skills are those generic 'soft skills' that are valued by employers and higher education alike. The following transferable skills have been contextualised into the content of the qualification:

- communication (oral)
- research.

Units which provide opportunities to achieve these skills are listed below:

Unit code	Unit title	Transferable skill(s)
D/506/6087	Customer communications	Research and communication (oral)
D/506/6090	Digital essentials	Research

Opportunities for each available transferable skill will be highlighted in the pass criteria for the unit where appropriate.

There may be more than one opportunity for each transferable skill to be evidenced to the required standard across the units within the qualification. It is important to note that learners **must** demonstrate successful achievement of the identified transferable skill(s) appropriate to the qualification on at least **one** occasion to the required standard.

The Transferable skills standards can be found at Appendix A.

## 3.4 What could this qualification lead to?

Learners who achieve this qualification will have a range of options.

Progression from this Level 3 qualification will prepare the learner for work in a support role within a range of marketing and sales-related functions/businesses. Learners could also access a higher apprenticeship.

Learners will be able to continue their studies with the broader AQA Level 3 Technical Level qualification in Business: Marketing, where they are aiming to specialise in business marketing either for work purposes or in higher education.

More generally, as the qualification is studied at 16 to 19 as part of the study programme, learners may also be studying additional qualifications such as an A-level, an EPQ, an AS and possibly re-sits for English and/or Maths (GCSE). Learners will potentially be able to access higher education – either HNCs and HNDs or Degree programme.

The following are examples of job opportunities within this sector: marketing administrator, marketing assistant, sales administrator.

Organisations that might employ someone with this qualification are: sales and marketing companies, PR companies, advertising companies, conference centres, market research companies, large commercial businesses, charities.

## 3.5 Who supports this qualification?

This qualification has been developed in collaboration with the Chartered Institute of Marketing (CIM), which supports the qualification.

## 3.6 What are the benefits of this qualification?

### To learners

Through this qualification you will develop that initial marketing communication knowledge and skill that enables you to function appropriately in a support role in a marketing/sales environment (eg, provision of information to customers on products and prices, fielding telephone queries from prospective customers, providing administrative support for sales and marketing campaigns etc).

Building on core units that study the wider business environment and the underpinning principles of marketing, you will study the purpose and process of communication with customers and the different communications tools that are available to convey messages. You will also study the impact of new communications media and how organisations use new technology such as websites and social networking to influence the consumer.

You will study the course as part of a learning programme that may also include other subjects. Your choice of subjects (where business-related) will complement study of this qualification and help develop a range of skills and knowledge relevant to the business sector.

You will be working on industry-focused assignments to help you to prepare for work and to talk confidently about your knowledge and skills in an interview situation.

### To employers

This qualification is linked to the following Standard Occupations Code (SOC)<sup>1</sup> to prepare learners for work in these areas:

#### **4151 marketing administrator, marketing assistant, sales administrator**

This qualification has been developed in consultation with the Chartered Institute of Marketing (CIM) which has identified a range of technical and personal skills that are essential for work in this area.

Through this qualification the learner will develop that initial marketing communication knowledge and skill that enables them to function appropriately in a support role in a marketing/sales environment (eg, provision of information to customers on products and prices, fielding telephone queries from prospective customers, providing administrative support for sales and marketing campaigns etc).

Building on core units that study the wider business environment and the underpinning principles of marketing, the learner will study the purpose and process of communication with customers and the different communications tools that are available to convey messages. They will also study the impact of new communications media and how organisations use new technology such as websites and social networking to influence the consumer.

All learners who have achieved this technical qualification will have learned and been assessed using the same content as there are no optional units in this programme and they will have demonstrated and achieved a range of transferable skills that are essential in this area, such as research and oral communication.

All learning will also involve synoptic assessment so that learners' understanding of the areas of study is rounded and complete.

Employers can, therefore, be confident that learners have a comprehensive grounding in both the required technical and personal skills.

<sup>1</sup>SOC code is Standard Occupational Category – a common classification of jobs based on their skill content and level – assigned by The Office for National Statistics.

## To higher education institutions (HEIs)

The qualification can be used alongside a range of other Level 3 qualifications (ie A-levels, Applied Generals etc) to gain access to a range of HE courses. Where the broader AQA Level 3 Technical Level Business: Marketing has also been studied, many will choose to use this qualification to access higher study in areas such as marketing, public relations, advertising, or continue to a business or public relations degree and specialise later in the programme.

As this qualification contains both examined and assignment-based assessment, the learner should be well prepared to make the adjustment to the learner-centred ethos of study at university.

Building on core units that study the wider business environment and the underpinning principles of marketing, the learner will study the purpose and process of communication with customers and the different communications tools that are available to convey messages. They will also study the impact of new communications media and how organisations use new technology such as websites and social networking to influence the consumer. Alongside this learners will have gained transferable skills that are important to success as marketing practitioners

All learning will also involve synoptic assessment so that learners' understanding of the areas of study is rounded and complete.

HEIs can, therefore, be confident that learners have a comprehensive grounding in both the required technical and personal skills.

## 3.7 Links to trailblazer apprenticeships

Programmes of study towards this qualification could be used to inform and underpin the requirements of the Level 3 Digital Marketer Trailblazer Apprenticeship.

## 3.8 Links to professional body memberships

This qualification forms part of the AQA Level 3 Technical Level Business: Marketing, the completion of which gives successful candidates access to the CIM Level 4 Professional Marketing qualifications.

Graduates of the AQA Level 3 Technical Level Business: Marketing will be eligible for Affiliate membership of the Chartered Institute of Marketing (CIM).

# 4 Level 3 Foundation Technical Level Business: Marketing Communications: Unit summary

This qualification is made up of four mandatory units. All units must be completed to achieve the full qualification.

	Unit title	Assessment type	Ofqual unit reference
1	Competitive business environment	External examination	K/506/6075
2	Marketing principles	External examination	Y/506/6086
3	Customer communications	Internally centre assessed	D/506/6087
4	Digital essentials	Internally centre assessed	D/506/6090

## Links with other qualifications

The following units:

K/506/6075 1 Competitive business environment

Y/506/6086 2 Marketing principles

D/506/6087 3 Customer communications

D/506/6090 4 Digital essentials

also appear within:

AQA Level 3 Technical Level Business: Marketing

# 5 Level 3 Technical Level Business: Marketing: Statement of purpose

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## 5.1 Qualification objective

The objective of this qualification is:

- preparing learners to progress to a qualification in the same subject area but at a higher level or requiring more specific knowledge, skills and understanding
- meeting relevant programmes of learning
- support a role in the workplace
- preparing learners for employment
- giving learners personal growth and engagement in learning.

## 5.2 Who is this qualification for?

This technical qualification is aimed at 16 to 18 year old learners who are seeking to develop broad-based skills in marketing for entry into this sector.

There are no formal entry requirements for this qualification but to optimise their chances of success, learners will typically have five GCSEs at A\* to C, preferably including English and Maths. Achievement in a creative subject such as art or media would also be beneficial.

This qualification could be taken alongside other Level 3 qualifications such as IT, graphics, sociology, psychology, for those who seek a career in research.

It can form part of a study programme, Technical Baccalaureate and would benefit from being studied alongside an Applied General, A-level or EPQ.



## 5.3 What does this qualification cover?

All of the units in this qualification are mandatory and will provide the core business marketing technical knowledge and skills required for preparing to work in this sector.

Four out of the eight units making up this qualification comprise the AQA Level 3 Foundation Technical Level in Business: Marketing Communications. However, unlike the Marketing Communications qualification, this qualification places an emphasis on the development of a broader range of marketing skills (such as research, stakeholder engagement, business ethics etc).

The learner will cover topics such as:

- an introduction to the establishment, growth and survival of a business
- key concepts and terminology of marketing and how it fits within the organisation
- main elements of marketing communications, customer relationship management, communications methods and tools, development of an outline marketing communications campaign
- key concepts associated with digital marketing
- understanding legal, ethical and social concerns influencing business activities
- marketing research and the roles and functions within this area of marketing
- understanding of a range of organisational stakeholders beyond the customer
- how to plan for, deliver and evaluate collaborative projects, exploring the importance of team dynamics and cooperation.

This qualification has been developed with the Chartered Institute of Marketing who have created professional standards in partnership with employers.

Transferable skills are those generic 'soft skills' that are valued by employers and higher education alike. The following transferable skills have been contextualised into the content of the qualification:

- communication (oral and written)
- research
- teamwork

Units which provide opportunities to achieve these skills are listed below:

Unit code	Unit title	Transferable skill(s)
D/506/6087	Customer communications	Research and communication (oral)
D/506/6090	Digital essentials	Research
H/506/6088	Marketing research	Communication (written)
M/506/6076	Collaborative project	Teamwork

Opportunities for each available transferable skill will be highlighted in the pass criteria for the unit where appropriate.

There may be more than one opportunity for each transferable skill to be evidenced to the required standard across the units within the qualification. It is important to note that learners **must** demonstrate successful achievement of the identified transferable skill(s) appropriate to the qualification on at least **one** occasion to the required standard.

The Transferable skills standards can be found at Appendix A.

## 5.4 What could this qualification lead to?

Learners who achieve this qualification will have a range of options.

Progression from this Level 3 qualification will lead to work as an assistant, clerical or practitioner role in industry. Learners could also access a higher apprenticeship.

However, as it is studied at 16 to 19 as part of the study programme, learners will be studying additional qualifications such as an A-level, an Applied General, an EPQ, an AS and possibly re-sits for GCSE English and/or Maths. Learners will potentially be able to access higher education – either HNCs/ HNDs or degree programmes.

Therefore, studying this qualification does not restrict future progression into one particular route.

The following are examples of job opportunities within this sector: business development executive, fundraiser, market research analyst, marketing consultant, marketing executive, account manager (sales), area sales manager, business development manager, sales manager, conference co-coordinator, event organiser, exhibition organiser, hospitality manager.

Companies that might employ someone with this qualification are: marketing companies, PR companies, advertising companies, conference centres, market research companies, large commercial businesses, charities.

## 5.5 Who supports this qualification?

This qualification has been developed in collaboration with employers, professional bodies and key stakeholders in the marketing sector. Because of this, the knowledge, skills and competencies gained will provide the best possible opportunity for progression into employment, a higher or advanced apprenticeship or higher education.

This qualification is supported by the following organisations:

AlfaPeople UK	<a href="http://alfapeople.com/">alfapeople.com/</a>
Burton and South Derbyshire College	<a href="http://bsdc.ac.uk/">bsdc.ac.uk/</a>
Chartered Institute of Marketing	<a href="http://cim.co.uk/">cim.co.uk/</a>
City of Wolverhampton College	<a href="http://wolvcoll.ac.uk/">wolvcoll.ac.uk/</a>
Newcastle-under-Lyme College	<a href="http://nulc.ac.uk">nulc.ac.uk</a>
Sales Improvement Services	<a href="http://salesimprovementservices.com/">salesimprovementservices.com/</a>
Sero	<a href="http://sero.co.uk/">sero.co.uk/</a>
Solihull College	<a href="http://solihull.ac.uk">solihull.ac.uk</a>
South and City College Birmingham	<a href="http://sccb.ac.uk/">sccb.ac.uk/</a>
South and City College Birmingham HE	<a href="http://sccb.ac.uk/higher-education">sccb.ac.uk/higher-education</a>
The Sheffield College	<a href="http://sheffcol.ac.uk/">sheffcol.ac.uk/</a>
Skills CFA	<a href="http://skillscfa.org/">skillscfa.org/</a>
Urban Futures	<a href="http://urbanfutures.co.uk/">urbanfutures.co.uk/</a>
Walsall College	<a href="http://walsallcollege.ac.uk/">walsallcollege.ac.uk/</a>
Weheartdigital	<a href="http://weheartdigital.uk/">weheartdigital.uk/</a>

## 5.6 What are the benefits of this qualification?

### To learners

For those of you who are creative but who also enjoy working with people, marketing is an excellent choice of career. Through this qualification you will gain knowledge and skills that will help you to become an influencer.

Building on core units that study the business environment and the principles of marketing, you will study how best to communicate with customers, explore how organisations use technology such as websites and social networking to influence the consumer, investigate how businesses can best behave responsibly, explore how research is undertaken to enable organisations to be effective in how they communicate, and how businesses forge strong relationships with stakeholders. Your studies will culminate in a collaborative project that you will test your ability to work as part of a team.

You will study the course as a part of a learning programme that may also include other subjects. Your choice of subjects (where business-related) will complement study of this qualification and help develop a range of skills and knowledge relevant to the business sector.

You will be working on industry-focused assignments to help you to prepare for work and to talk confidently about your knowledge and skills in an interview situation.

### To employers

This qualification is linked to the following Standard Occupations Code (SOC)<sup>2</sup> to prepare learners for work in these areas:

**3543 marketing associate professionals**

**3545 sales accounts and business development managers**

**3546 conference and exhibition managers and organisers**

This qualification is based on the CIM professional standards for marketing and has been developed in consultation with the CIM and employers who have identified a range of technical and personal skills that are essential for work in this area.

Building on the requirements of the Foundation Technical Level in Business: Marketing Communications, the learner will develop further and more broadly their marketing knowledge and skill in order to function appropriately in a range of support and more junior technical roles in the marketing environment (eg events organisation, campaign materials development etc).

After a study of the competitive business environment, learners will consider the principles of marketing, how to communicate successfully with customers, and how technologies such as social networking are used to influence consumer behaviour. They will also consider how businesses behave responsibly, how effective research is undertaken and how to develop and maintain stakeholder relationships. Alongside this learners will have gained transferable skills that are important to success as marketing practitioners.

All learners who have achieved this technical qualification will have learned and been assessed using the same content as there are no optional units in this programme. They will have demonstrated and achieved a range of transferable skills that are essential in this area such as teamwork, and the ability to research in both written and oral communication.

<sup>2</sup>SOC code is Standard Occupational Category – a common classification of jobs based on their skill content and level – assigned by The Office for National Statistics.

All learners will have been involved in a contextualised project which will have been industry driven and which will demonstrate the ability to contribute to team performance.

Employers can, therefore, be confident that learners have a comprehensive grounding in technical and personal skills.

## To higher education institutions (HEIs)

Discussions with HEIs during the development of this marketing qualification identified that to succeed in higher study in this area learners would need a wide level of basic knowledge of all areas of business and marketing. Many will, for example, choose to use this qualification to access higher study in one particular area such as marketing, public relations, advertising, or they could continue to a business or public relations degree and specialise later in the programme.

As this qualification contains both examined and assignment-based assessment, the learner should be well prepared to make the adjustment to university or college study.

After a study of the competitive business environment, learners will consider the principles of marketing, how to communicate successfully with customers, and how technologies such as social networking are used to influence consumer behaviour. They will also consider how businesses behave responsibly, how effective research is undertaken and how to develop and maintain stakeholder relationships. They will bring all of these themes together in a final collaborative project which will synoptically assess their abilities to deploy their skills and knowledge in an integrated way as a part of a team. Alongside this learners will have gained transferable skills that are important to success as marketing practitioners.

HEIs can, therefore, be confident that learners will be ready to study at higher levels.

## 5.7 Links to trailblazer apprenticeships

Programmes of study towards this qualification could be used to inform and underpin the requirements of the Level 3 Digital Marketer Trailblazer Apprenticeship.

## 5.8 Links to professional body memberships

This qualification is based on the CIM professional standards for marketing and gives successful candidates access to the CIM Level 4 Professional Marketing qualifications. Graduates will be eligible for Affiliate membership of the Chartered Institute of Marketing (CIM).

# 6 Level 3 Technical Level

## Business: Marketing:

### Unit summary

This qualification is made up of eight mandatory units. All units must be completed to achieve the full qualification.

	Unit title	Assessment type	Ofqual unit reference
1	Competitive business environment	External examination	K/506/6075
2	Marketing principles	External examination	Y/506/6086
3	Customer communications	Internally centre assessed	D/506/6087
4	Digital essentials	Internally centre assessed	D/506/6090
5	Responsible business practices	External assignment	M/507/6641
6	Marketing research	Internally centre assessed	H/506/6088
7	Stakeholder engagement	Internally centre assessed	H/506/6091
8	Collaborative project	Internally centre assessed	M/506/6076

# 7 Meaningful employer involvement

## 7.1 Introduction

It is important that centres develop an approach to teaching and learning that supports the assessment of the technical focus of a Tech-level qualification. The specification contains a balance of practical skills and knowledge requirements and centres need to ensure that appropriate links are made between theory and practice in a way that is relevant to the occupational sector.

This will require the development of relevant and up-to-date training materials that allow learners to apply their learning to actual events and activity within the sector, and to generate appropriate evidence for their portfolio.

It is a requirement that employers are involved in the delivery and/or assessment of the Tech-level to provide a clear 'line of sight' to work, advanced/higher apprenticeships or higher education. Employer engagement enriches learning, raises the credibility of the qualification in the eyes of employers, parents and learners – as well as also furthering the critical collaboration between the learning and skills sector, and industry.

**It is therefore a requirement that all learners undertake meaningful activity involving employers during their study and this activity will be scrutinised as part of our ongoing quality assurance activities with centres.**

Such is the importance of meaningful employer involvement in the delivery of this qualification, should a centre be unable to evidence this, we will impose a sanction, together with an associated action plan. Further information on this process can be found in the *AQA Centre Administration Guide for Technical and Vocational Qualifications*.

AQA will not stipulate the minimum duration or contribution of employer involvement to the overall qualification grade as it is important that centres and employers are allowed flexibility in how best to work together to support learning and in which units – but this collaboration must be significant.

## 7.2 Definition of meaningful employer involvement

In order to meet our requirements, meaningful employer involvement must take at least one of the following forms:

- learners undertake structured work experience or work placements that develop skills and knowledge relevant to this qualification
- learners undertake project work, exercises and/or assessments set with input from industry practitioners – such as getting employers involved in developing real life case studies, or assignments
- learners take one or more units delivered or co-delivered by an industry practitioner – this could be in the form of masterclasses or guest lectures
- industry practitioners operating as 'expert witnesses' that contribute to the assessment of a learner's work or practice, operating within a specified assessment framework. This may be for specific project work, exercises or examinations, or all assessments for a qualification.

For the purpose of clarity, the following activities, whilst valuable, would **not** be considered as meaningful employer involvement:

- employers hosting visits, providing premises, facilities or equipment
- employers or industry practitioners providing talks or contributing to delivery on employability, general careers advice, CV writing, interview training
- learner attendance at career fairs, events or other networking opportunities
- simulated or centre-based working environments
- employers providing learners with job references.

More information on employer involvement in the delivery of technical level qualifications can be found at:

*Employer Involvement in Qualifications Delivery and Assessment – Research report* (April 2014)

[gov.uk/government/uploads/system/uploads/attachment\\_data/file/306280/RR341 - Employer Involvement in Qualifications Delivery and Assessment Research Report.pdf](https://gov.uk/government/uploads/system/uploads/attachment_data/file/306280/RR341_-_Employer_Involvement_in_Qualifications_Delivery_and_Assessment_Research_Report.pdf)

Post-16 work experience as a part of 16 to 19 study programmes and traineeships – departmental advice for post-16 education and training providers:

[gov.uk/government/uploads/system/uploads/attachment\\_data/file/268624/document.pdf](https://gov.uk/government/uploads/system/uploads/attachment_data/file/268624/document.pdf)

## 7.3 Employer involvement in quality assurance

We need to make sure that the assessment remains relevant and valid, and that learning outcomes are what employers and higher education institutions are expecting of a learner who has achieved a Level 3 Tech-level qualification.

Each year a panel, including representatives from employers and HE, will be brought together to review outcomes from the units and we will ask for samples of learner work from your centre at each AQA external quality assurer (EQA) visit.

We are keen to work collaboratively with employers and HE to make sure that whatever the progression route chosen by the learner, this qualification will be recognised and valued.

If you have a local employer that would like to be involved in this review, we would be very pleased to consider them. Please email their contact details to [techlevels@aqa.org.uk](mailto:techlevels@aqa.org.uk)



# 8 Synoptic delivery and assessment

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The definition of synoptic assessment used by AQA is:

‘A form of assessment which requires a learner to demonstrate that they can identify and use effectively, in an integrated way, an appropriate selection of skills, techniques, concepts, theories, and knowledge from across the whole qualification or unit, which are relevant to a key task’.

The design of this qualification allows learners to develop knowledge, understanding and skills from some units and then evidence this learning in the performance outcomes contained within other units.

The significant amount of synoptic content within the Tech-level supports synoptic learning and assessment by:

- showing teaching and learning links between the units across the specification
- giving guidance or amplification relating to the grading criteria for the internally assessed units, about where learners could apply the knowledge and understanding from other units
- providing a coherent learning programme of related units
- allowing holistic delivery and the application of prior or concurrent learning
- providing opportunities for the learning and assessment of multiple units combined together to promote holistic delivery
- developing and assessing learners’ use of transferable skills in different contexts.

Whilst we do not prescribe in which order the units should be delivered or assessed, we do identify a suggested, logical order for delivery, and each unit contains more information on this suggested order. This also means that we have not necessarily identified for each unit the full range of its links with other units. Where centres are not following the recommended order of unit delivery, then it is important that they identify those links that are relevant for their own pattern of delivery.

It is important for centres to be aware of the links between the units so that the teaching, learning and assessment can be planned accordingly. This way, when being assessed, learners can apply their learning in ways which show they are able to make connections across the qualification.

Within each unit we provide references to where the unit content maps from or to other units within the qualification. This will help the learner understand where there are explicit opportunities for synoptic learning as well as synoptic assessment.

For example, learners will be able to see very clearly how they can apply the underpinning knowledge and theory from the core units into real life or work-related tasks – such as projects and work experience – within the specialist units.

This approach will also enable learners to integrate transferable skills, much valued by employers and HE into their assignments.

**It is therefore a requirement that all learners undertake meaningful synoptic learning and assessment during their study.**

**Plans for how this will be undertaken will be scrutinised as part of our centre approval process and its implementation monitored during our ongoing quality assurance activities with centres.**



The following grid demonstrates the overall synoptic coverage in each of the seven marketing units of the qualification:

Unit	Pass criteria	Synoptic links to other units	% of synoptic assessment
Competitive business environment	n/a	Units 2, 3, 4, 5, 6, 7*	n/a
Marketing principles	n/a	Units 1, 3, 4, 5, 6, 7*	n/a
Customer communications	2, 3, 4, 5, 7, 8, 10	Units 1, 2, 4, 5, 6, 7	7/13 (54%)
Digital essentials	1, 2, 3, 4, 5, 6, 8, 9	Units 1, 2, 3, 5, 6, 7	8/12 (67%)
Responsible business practices	1, 2, 3, 4, 5, 9, 10	Units 1, 2, 3, 4, 6, 7	7/11 (64%)
Marketing research	1, 3, 4, 5, 7, 8, 9, 10, 11	Units 1, 2, 3, 4, 5, 7	9/13 (69%)
Stakeholder engagement	1, 2, 3, 4, 7, 9, 10, 11	Units 1, 2, 3, 4, 5, 6	8/13 (62%)

\*As these units are ideally delivered first, we have chosen to focus in the unit specifications upon Unit 1 and Unit 3's relationship with each other. Their links to other units are evident through consideration of Units 3 to 7.

Unit 8 Collaborative project has not been included in the above grid as it has potential links with every unit, but this is dependent on the way in which each individual centre chooses to build the synoptic coverage in its delivery.

## 9 Guided learning hours

For any qualification which it makes available, Ofqual requires an awarding organisation to:

- a assign a number of hours for total qualification time to that qualification, and
- b assign a number of hours for guided learning to that qualification.

Total qualification time is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected to be required in order for a learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a qualification.

Total qualification time is comprised of the following two elements:

- a the number of hours which an awarding organisation has assigned to a qualification for guided learning (GLH)  
AQA has assigned GLH to the overall qualification and the individual units.
- b an estimate of the number of hours a learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but, unlike guided learning, not under the immediate guidance or supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

AQA has assigned the following GLH and TQT values to its qualifications:

Qualification	Guided learning hours (GLH)	Total qualification time (TQT)
Business: Marketing Communications (TVQ01021)	360	380
Business: Marketing (TVQ01020)	720	760

# 10 Transferable skills

These valued ‘employability’ skills are an integral and explicit element within the design and structure of all AQA Level 3 Technical Level qualifications.

Discussions and collaboration with centres, employers and stakeholders (such as further education (FE) colleges, university technical colleges (UTCs), sector-skills councils, professional/trade bodies and HE), made it clear that the inclusion of these skills is regarded as a priority, and that they should be included through contextualisation within the core subject content.

Employers and stakeholders prioritised the skills they required from employees in the sector as follows:

- teamworking
- communication
- research.

Rather than force the inclusion of these skills across a random selection of units or across the qualification as a whole, specific units have been identified as being most appropriate and suitable for the inclusion of a transferable skill within the subject context. The skill becomes the driver for the assessment – rather than the subject content and this will be demonstrated by producing evidence to meet the required standard<sup>3</sup>. Not every unit within the qualification has a skill contextualised within the subject content.

Transferable skill opportunities can be found in the following units for each of the qualifications:

## Level 3 Foundation Technical Level Business: Marketing Communications

Unit code	Unit title	Transferable skill(s)
D/506/6087	Customer communications	Research and communication (oral)
D/506/6090	Digital essentials	Research

## Level 3 Technical Level Business: Marketing

Unit code	Unit title	Transferable skill(s)
D/506/6087	Customer communications <sup>4</sup>	Research and communication (oral)
D/506/6090	Digital essentials <sup>4</sup>	Research
H/506/6088	Marketing research	Communication (written)
M/506/6076	Collaborative project	Teamwork

The skill is assessed as a performance outcome of the unit, at the Pass grade. It is assessed in the same way as any other assessment criteria within the unit.

The formal inclusion of a contextualised transferable skill does not preclude the inclusion of other ‘soft’ or ‘employability’ skills within the unit at the point of delivery, for example those which employers and HE also value, such as critical thinking, project management, leadership, time management etc. However, these additional ‘employability’ skills will not be formally assessed as part of the unit performance outcomes.

The Transferable skills standards can be found in Appendix A.

<sup>3</sup>Please visit the specification homepage to access the Transferable skills standards and associated guidance and recording documentation.

<sup>4</sup>Where these transferable skills have been achieved as a part of the Business: Marketing Communications qualification, then learners do not need to achieve them for the Business: Marketing qualification.

## The AQA Skills statement

Upon the successful completion of a qualification, each learner will be issued with a Skills statement that will sit alongside their formal qualification certificate.

This Skills statement records the transferable skills that were contextualised within the units of the qualification and is an explicit way for learners to showcase the skills that have been formally assessed as part of the qualification. This Skills statement can then be used by a learner as evidence of this achievement within their CVs or HE applications.

# 11 Support materials and guidance

The following delivery resources and support materials are available from AQA:

- A full Scheme of work (SOW) has been provided for each of the units in this programme. The SOW breaks down the unit content across a 30 teaching week academic year, although this is not mandated. Suggestions have been made for activities both for the tutor and the learner, and the document also contains links to external resources such as videos, task sheets, pdfs, PowerPoint presentations, etc. Opportunities to develop English and maths skills have been identified and flagged, and SOWs include some mapping for stretch and challenge and equality and diversity, although tutors will benefit from making this much more group relevant. Resources have been identified and the assessment points for transferable skills have been highlighted in the final column.
- A sample Lesson plan (LP) has also been provided against the SOW, as a guide for good practice.
- Question papers and mark schemes have been made available for each of the examined units.

The SOWs and lesson plans are available at: [aqa.org.uk/subjects/business-subjects/tech-level/business-marketing](https://www.aqa.org.uk/subjects/business-subjects/tech-level/business-marketing)

In addition, a sample assignment has been provided for each of the internally assessed units. These are not mandated in the assessment of this qualification, but do provide a good starting point to help tutors who would benefit from assessment support. These assessments do not necessarily cover all of the criteria that need to be assessed within a unit and it is the tutor's responsibility to ensure that all criteria are assessed across the unit and qualification.

The Sample assessment materials (question papers and mark schemes), plus the available sample assignments can be found at: [aqa.org.uk/subjects/business-subjects/tech-level/business-marketing](https://www.aqa.org.uk/subjects/business-subjects/tech-level/business-marketing)

# 12 Qualification units

## 12.1 Unit 1: Competitive business environment

<b>Title</b>	Competitive business environment
<b>Unit number</b>	K/506/6075
<b>Unit assessment type</b>	Externally assessed
<b>Guided learning hours</b>	90
<b>Transferable skill(s) contextualised within this unit</b>	n/a
<b>Resources required for this unit</b>	<ul style="list-style-type: none"> <li>Computers with access to the internet.</li> <li>Spreadsheet and word-processing software.</li> </ul>
<b>Meaningful employer involvement</b>	It is a requirement that all learners undertake meaningful activity involving employers during their study and this activity will be scrutinised as part of our ongoing quality assurance activities with centres.
<b>Synoptic assessment and learning</b>	This unit is ideally delivered first and alongside Unit 2. There are opportunities for learners to demonstrate synoptic knowledge and learning from Unit 2 in this unit.

### Aim and purpose

This unit introduces learners to how businesses establish themselves, grow and survive. It considers the factors determining the ability of businesses to successfully compete within local, national and international markets.

### Unit introduction

The survival and growth of any business depends on its ability to respond effectively to its competitive environment. After looking at some of the key concepts concerning the creation of any business, learners will investigate trends in the economic environment. They will explore how these trends affect the ability of businesses to achieve their objectives and how businesses might respond to the impact on objectives by, for example, increasing or reducing their sales capacity. Learners will consider the meaning of competition and the significance of innovation. They will investigate how businesses innovate and the extent to which businesses can use innovation to improve their competitive positions. Finally, learners will investigate the use of SWOT analysis and how businesses can identify and recommend responses to their opportunities and threats.

## Unit content

Business enterprise	
Enterprise and enterprising behaviour	<ul style="list-style-type: none"> <li>• The meaning of enterprise and the significance of risk and uncertainty.</li> <li>• The meaning of enterprising behaviour and how this can be demonstrated by a range of individuals within a business.</li> <li>• The benefits of enterprise and enterprising behaviour to the internal and external stakeholders of a business.</li> </ul>
Business vision, aims and objectives	<ul style="list-style-type: none"> <li>• Vision statements: a succinct description of what a business wants to achieve in the long run.</li> <li>• Aims: aspects of a vision statement eg achieving a specific profit level.</li> <li>• Business objectives: specific and measurable targets intended to achieve an aim eg reduce manufacturing costs in the UK by 10%, increase sales in France by 5%.</li> </ul>
Forms of business ownership	<ul style="list-style-type: none"> <li>• The features of different forms of business ownership: sole trader, partnership, cooperative, community interest company (CIC), private limited company (Ltd) and public limited company (PLC).</li> <li>• How a range of factors determine the choice of business ownership, including: business vision, decision making, funding requirements, liability.</li> </ul>
Business functions	<ul style="list-style-type: none"> <li>• How businesses need to manage their functions across locations, to include those related to:               <ul style="list-style-type: none"> <li>• product mix, prices, promotional activities, and sales channels</li> <li>• physical resources (equipment and facilities)</li> <li>• human resources (staffing levels, roles and skills).</li> </ul> </li> <li>• How location decisions are determined by a range of factors, including:               <ul style="list-style-type: none"> <li>• the type of product, the type and location of market, human resource requirements, infrastructure and transportation.</li> </ul> </li> </ul>
Trends in the economic and social environment	
Economic data	<ul style="list-style-type: none"> <li>• UK and international economic data:               <ul style="list-style-type: none"> <li>• economic growth: annual, quarterly and monthly percentage changes in gross domestic product</li> <li>• average income: local, national and international (expressed in a common currency, eg \$); distribution across deciles</li> <li>• consumer spending: by product; by consumer age, sex, location and income (common currency eg \$)</li> <li>• unemployment: ilo and claimant count</li> <li>• inflation: cpi</li> <li>• interest rates: base rates and commercial rates</li> <li>• exchange rates, eg £1: €1.22, \$1: £0.59.</li> </ul> </li> </ul>
Identifying trends in the economic environment	<ul style="list-style-type: none"> <li>• Interpreting economic data presented in the form of:               <ul style="list-style-type: none"> <li>• tables</li> <li>• averages (mean, mode and median)</li> <li>• pie and bar charts</li> <li>• line and scatter graphs.</li> </ul> </li> </ul>

## Trends in the economic and social environment

Social trends	<ul style="list-style-type: none"> <li>• How patterns of consumer spending are affected by:               <ul style="list-style-type: none"> <li>• attitudes towards the accessibility of products and customer services (eg 24 hour access to services)</li> <li>• living standards and quality of life expectations</li> <li>• environmental concerns (eg genetically modified foods)</li> <li>• ethical concerns about the sourcing and manufacturing of goods (eg fair trade issues and using animals to test drugs).</li> </ul> </li> </ul>
The impact of social and economic trends on business organisation	<ul style="list-style-type: none"> <li>• How social and economic trends affect business costs and sales (price, volume and revenue).</li> <li>• How businesses might react to social and economic trends by altering:               <ul style="list-style-type: none"> <li>• product mix</li> <li>• prices</li> <li>• sales capacity</li> <li>• staffing levels, roles and skills</li> <li>• location</li> <li>• form of business ownership.</li> </ul> </li> </ul>

## The impact of competition and innovation

The meaning and impact of competition	<ul style="list-style-type: none"> <li>• How markets are defined by product and location.</li> <li>• The meaning and calculation of market share: sales value and volume.</li> <li>• The meaning of direct and indirect competition.</li> <li>• The competitive positions of businesses within markets:               <ul style="list-style-type: none"> <li>• leaders</li> <li>• challengers</li> <li>• followers</li> <li>• niche.</li> </ul> </li> <li>• How Porter's five forces model can be used to analyse the degree of competitive rivalry in a market.</li> <li>• How markets can be segmented using different methods:               <ul style="list-style-type: none"> <li>• geographic</li> <li>• demographic</li> <li>• behavioural</li> <li>• lifestyle</li> <li>• benefits.</li> </ul> </li> <li>• The meaning of competitive advantage and how this influences the competitive position of a business.</li> <li>• How the success or failure of a business depends on:               <ul style="list-style-type: none"> <li>• its competitive position</li> <li>• the competitive rivalry it faces</li> <li>• its ability to define and access market segments</li> <li>• the extent and nature of its competitive advantage.</li> </ul> </li> </ul>
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## The impact of competition and innovation

The role of innovation in competitive markets

- The difference between innovation and invention.
- How technological development supports innovation.
- How businesses can innovate by:
  - creating a culture of enterprising behaviour within the business
  - engaging with external stakeholders to generate ideas.
- How businesses seek to protect their innovations through the use of:
  - patents
  - copyrights
  - trademarks.
- The extent to which businesses can use innovation to:
  - establish and maintain a competitive advantage
  - improve their competitive position.

## Business opportunities and threats

SWOT analysis

- How businesses can analyse their internal strengths and weaknesses, considering their customers, competitors and resources, eg considering competitive advantage and scope of patents.
- How businesses can analyse their external opportunities and threats, eg considering competitor innovations and changing consumer spending patterns.
- How businesses can use a SWOT matrix to identify possible responses to their opportunities and threats:
  - S–O response: pursuing opportunities that exploit existing business strengths
  - W–O response: pursuing opportunities whilst overcoming existing business weaknesses
  - S–T response: using existing strengths to defend against threats
  - W–T response: overcome existing weaknesses to reduce the potential damage of threats.

Marketing strategies

- The marketing strategies available to businesses:
  - Ansoff's competitive strategies – market penetration, market development, product development, diversification
  - Porter's generic strategies – cost leadership, differentiation, focus.

Responding to opportunities and threats

- How a business can decide on its response to opportunities and threats by considering:
  - its completed SWOT matrix
  - marketing strategies available to it
  - the possible reactions of competitors and consumers.

## Assessment outcomes

Learners will be able to:

### Assessment outcome 1: Investigate business enterprise

a	Apply knowledge and understanding of enterprise and enterprising behaviour to business contexts and analyse the benefits of these.
b	Apply knowledge and understanding of business vision, aims and objectives to business contexts and analyse the suitability and/or achievement of these.
c	Apply knowledge and understanding of business ownership to business contexts and analyse factors determining the choice of business ownership.
d	Apply knowledge and understanding of business functions to business contexts and analyse how businesses might manage: <ul style="list-style-type: none"> <li>• product mix, product prices, promotional activities and sales channels</li> <li>• physical resources (equipment and facilities)</li> <li>• human resources (staffing levels, roles and skills).</li> </ul>
e	Apply knowledge and understanding of the location decision to business contexts and analyse the factors determining the location decision.

### Assessment outcome 2: Investigate trends in the economic and social environment

a	Apply knowledge and understanding of UK and international economic data to business contexts.
b	Analyse trends in UK and international economic data presented in the form of: <ul style="list-style-type: none"> <li>• tables</li> <li>• averages (mean, mode and median)</li> <li>• pie and bar charts</li> <li>• line and scatter graphs.</li> </ul>
c	Apply knowledge and understanding of social and economic trends to business contexts and analyse the impact of these on business costs and sales.
d	Analyse how businesses, in given contexts, might react to social and economic trends by altering one or more of their: <ul style="list-style-type: none"> <li>• product mix</li> <li>• product prices</li> <li>• sales capacity staffing (levels, roles and skills)</li> <li>• location</li> <li>• business ownership.</li> </ul>

**Assessment outcome 3: Assess the impact of competition and innovation**

a	Apply knowledge and understanding of competition and competitive position to business contexts.
b	Use Porter's five forces model to analyse the degree of competitive rivalry within a given market
c	Apply knowledge and understanding of market segmentation to business contexts.
d	Apply knowledge and understanding of competitive advantage to business contexts and analyse the impact of this on the competitive position of businesses within a given market.
e	Analyse and evaluate the extent to which the success or failure of a business, within a given market, depends on: its competitive position; competitive rivalry; ability to successfully segment the market; the extent and nature of its competitive advantage.
f	Apply knowledge and understanding of innovation and its processes to business contexts, including those involving technological development.
g	Apply knowledge and understanding of patents, copyrights and innovations to business contexts.
h	Analyse and evaluate the extent to which a business, within a given market, can use innovation to establish and maintain a competitive advantage and/or improve its competitive position.

**Assessment outcome 4: Assess business opportunities and threats**

a	Apply knowledge and understanding of SWOT analysis and SWOT matrices to business contexts.
b	Apply knowledge and understanding of Ansoff's competitive strategies to business contexts.
c	Apply knowledge and understanding of Porter's generic strategies to business contexts.
d	Analyse and evaluate the suitability of a business's response to its opportunities and threats, within a given market, by considering: <ul style="list-style-type: none"> <li>the marketing strategies used</li> <li>the behaviour of competitors and consumers.</li> </ul>
e	Analyse and evaluate how a business might respond to its opportunities and threats, within a given market, by considering: <ul style="list-style-type: none"> <li>a completed SWOT matrix</li> <li>the marketing strategies available.</li> </ul>

## Assessment

This unit is assessed by an external examination set and marked by AQA. The examination takes place under controlled examination conditions and the exam date will be published at the start of each academic year.

Learners are allowed to use a non-programmable scientific calculator in the examination.

The examination consists of a written paper with two sections, A and B. Learners will have to complete both sections and there will be no optional questions within either section.

The examination will last 2 hours and the total number of marks available in the examination is 80.

Section A will be worth 50 marks and consist of relatively short questions based on the whole of the specification for this unit. The learners will be required to answer all of the questions in Section A.

Section B will be worth 30 marks and will include longer questions worth up to 15 marks each. The questions in Section B will not necessarily cover the whole of the specification for this unit at each assessment. The learners will be required to answer all of the questions in Section B.

AQA will ensure that the full content of the unit is covered equally over the life of the qualification.

## Synoptic assessment

Whilst there are no requirements to deliver units in a prescribed order, this is an underpinning knowledge unit and best delivered first and alongside Unit 2. There are opportunities for learners to demonstrate synoptic knowledge and learning from Unit 2 in this unit.

The following is a summary of the teaching and learning links that can be developed between Unit 1 Competitive business environment and Unit 2 Marketing principles.

## Unit 2 Marketing principles

Learners understand how marketing fits within the business as a key function. Learners understand how the marketing of a business is affected by the external competitive environment and how this would impact upon a business's marketing strategy.

The grid below identifies specific opportunities for synoptic teaching and learning.

Performance criteria	Link unit reference	Description of link
<b>AO1 D</b> Apply knowledge and understanding of business functions to business contexts and analyse how businesses might manage – product mix, product prices, promotional activities, and sales channels.	Unit 2: AO4 A The 4Ps of the marketing mix.	How the marketing mix relates to the broader promotional/sales function and the idea of business functions. How the marketing mix can be used and adapted by businesses in varying situations.
<b>AO2 A</b> Apply knowledge and understanding of UK and international economic data to business contexts.	Unit 2: AO2 A Elements of the macro environment ie PESTEL.	How the wider economic environment shapes the marketing environment and the factors influencing consumer behaviour and the marketing of the business.
<b>AO3 A</b> Apply knowledge and understanding of competition.	Unit 2: AO2 B Elements of the micro environment, eg customers, competitors, suppliers, etc.	The importance of recognising the competitive environment when planning for the marketing of a business. The importance of being able to explain the impact that competitors can have on a business.

## Delivery guidance

### Assessment outcome 1

Learners could be introduced to the ideas of enterprise and enterprising behaviour through considering a number of potential business ideas. These ideas should cover a range of purposes, including social enterprise activities (eg relevant to the needs of their local community). The significance of risk and uncertainty – and the crucial difference between them – could be introduced through the use of a small scale ‘dragons’ den’ exercise. Learners could be provided with outline business plans (containing brief essential information in relation to customers, sales and possible profits) and be asked to pitch for funds. The meaning of, and potential benefits to, internal and external stakeholders could be developed from this exercise, ie key stakeholder groups could be introduced, including customers, suppliers, staff, owners and funders.

At this stage, learners could then be introduced to the central concepts of vision statements, aims and objectives. A number of brief case studies, some drawn from local businesses, could be used to illustrate the differences between aims and objectives. These case studies could also be used to illustrate the importance of setting and monitoring objectives. Examples of businesses that have struggled to achieve their objectives could then be used to illustrate the importance of vision statements, ie that vision statements help businesses to remind themselves of their primary goal, especially when faced by potential failure.

When delivering the forms of business ownership, centres could return to the ‘dragons’ den’ exercise and ask learners to investigate possible forms of ownership. They would be introduced to the key features of relevant forms (ignoring PLC at this stage) and asked to recommend the best form. This exercise could be extended by asking learners to consider how the form of ownership might be changed as one or more of the businesses aimed to expand. The factors determining the choice of business ownership could then be considered in detail and more complex scenarios presented to learners.

As the concept of business expansion has now been introduced, the need for business functions should be apparent. Whilst copious examples of the issues associated with business function can be used, the ability of learners to appreciate the significance of these issues is often less assured. Consequently, centres might want to spend some time helping learners to appreciate the importance of business functions and location. As the unit considers local, national and international contexts, learners should be familiar with the operation of large companies. Centres could present learners with a research exercise on how a well-known multinational PLC has developed and located over a period of time. This would also present an opportunity for learners to apply their understanding of all AO1’s content. In addition, this could present an opportunity to flag up the content of AO2. The PLC could be used by learners throughout the delivery of the unit, acting as an anchor for their overall understanding of the unit’s content.

### Assessment outcome 2

Learners are not required to understand the forces determining the economic data listed in the unit, but they are required to understand the impact of trends on the achievement of business objectives. Centres should introduce learners to how the demand for businesses’ products is partly determined by the level of consumers’ income and, in turn, the ‘health’ of the economy. The importance of consumer spending patterns could then be investigated and learners could explore how this might affect products sold in the UK. Centres should take time to cover this aspect of economic data in some detail as it represents the ways in which consumer preferences change. For example, centres might want to look at changes in demand for mobile phones eg spending on smartphones compared with that on feature phones. The concept of distribution of income could be illustrated by considering how a business, selling a wide range of products, might respond to changes in the distribution – UK figures could be introduced (using bar charts) to illustrate the changes.

The meaning and importance of interest and exchange rates could be introduced by considering the recent experiences of UK businesses. Some of these businesses would be trading internationally and the importance of exchange rates could be illustrated using these businesses. Learners could develop an appreciation of exchange rates through websites such as eBay and PayPal where transactions take place using a foreign currency, eg investigating how fluctuations in exchange rates affect a UK eBay site trading with foreign suppliers and buyers.

Learners will need to be given sufficient time to understand the meaning and use of the economic data listed in the unit. They could develop their 'economic literacy' through a series of carefully chosen business case studies and associated problem solving exercises. These would develop in complexity, initially covering just one type of data and using a restricted range of presentation, eg a single bar chart. The complexity could develop, but learners should not be presented with too many different sets of data within each case study. Essentially, this would mean no more than two types of data and forms of presentation. Learners should, however, be able to read paragraphs of text containing data, eg an internet page reporting the performance of a business that makes reference to economic growth and interest rates.

Social trends cover a wide range of factors affecting the behaviour of consumers and centres should restrict themselves to those listed in the unit. The focus here should be on the changing patterns of spending observed as economies develop and living standards improve. Some investigations into attitudes of consumers in developed and developing economies should serve to illustrate how these change as economies develop.

The impact of economic and social trends on business activities could be developed by looking at key decisions made by one or two businesses over a five year period, eg 2005 to 2010. Learners should be able to appreciate why the decisions were made. They should also be presented with current business case studies and asked to recommend decisions, given key economic and social trends and their impact on achieving business objectives. Learners could then return to their 'adopted' PLC, from AO1, and investigate how economic and social trends have affected the business.

### Assessment outcome 3

The businesses, adopted in AO1, could also be used to illustrate the meaning of a competitive market. One or two of these PLCs could be used to investigate the idea of market share and competitive position. Learners should understand how businesses can gain market leadership by establishing a competitive advantage. This could be illustrated through a focus on a particular market, eg computer games consoles. Centres should focus on the 'consumer offer' aspects of competitive advantage, ie the extent to which the combination of price and consumer benefits offered by a business's product is demonstrably better than those offered by its competitors. This can be approached through the use of Porter's five forces model. It also inevitably requires learners to understand the idea of a target market. At this stage, the different approaches to market segmentation could be introduced. Internet research will help to reveal the variety of ways in which particular markets can be segmented – many of them using behavioural, lifestyle and benefits methods. The focus here should be on the usefulness of market segmentation and the problems it presents to businesses, ie the uncertainty faced when deciding if and how segmentation should be used.

Learners could then be asked to investigate a market of their own choosing, perhaps that of their adopted PLC. They could profile the leaders and challengers in the market, identifying followers and suggesting possible nichers. They could then be asked to present their findings and consider how the structure of the market might change in the next two to three years, eg will the market leaders maintain their position given the activities of the challengers; will trends in the economic environment result in significant changes to consumer spending patterns and 'disrupt' the market?

Learners could then consider the factors that influence the success or failure of businesses in competitive markets. Learners should develop their understanding of how businesses need to be aware of competitor actions and regularly assess their competitive advantage. Centres could provide



learners with scenarios, taken from real markets, to illustrate how potential challengers can be attacked by market leaders. This could then illustrate the advantages of a nicher or follower strategy. Equally, they could be given examples of how market followers, without a clear competitive advantage, can be 'squeezed' by the actions of market challengers and leaders. Finally, the difficulty of remaining as a market nicher could be illustrated using real case studies of apparently successful market nichers who grew sufficiently popular with consumers to gain the attention of market leaders. Whether this was the original intention of the market nicher could then be discussed (eg internet technology businesses).

At this stage learners could then consider the meaning and significance of innovation. Examples taken from technology based markets are readily available (eg smartphones and tablets). How businesses can be innovative could also be illustrated through this market, focussing on a culture of enterprising behaviour. In addition, less technologically based markets could be used to illustrate the importance of engaging with consumers and suppliers (eg ready meals). The importance of protecting innovations could be illustrated by copyright and trademark symbols on products and packaging. The idea of patents and the difficulty of applying them could then be introduced. Examples of patents not having been successfully applied could illustrate the difficulty of protecting innovations. The mobile phone market is one example of the difficulty of successfully protecting innovations.

Finally, learners could investigate the key role played by innovation in a range of competitive markets. They should also, however, recognise the extreme difficulty of protecting innovations in a global economy, ie how to react to businesses in overseas markets that develop their own implementations of the innovation. Learners could then be asked to consider the extent to which innovation has been crucial to the success of the PLC they adopted in AO1.

#### Assessment outcome 4

At this stage, learners should be familiar with the idea of external economic and competitive forces. They should also be familiar with the idea of businesses responding to these forces. As such, SWOT analysis should be introduced as a way in which businesses can systematically analyse possible responses to their current competitive position.

Learners should carry out a number of SWOT analyses – given key information – to develop their ability to understand the differences between internal strengths/weaknesses and external opportunities/threats. They could be asked to summarise two or three key findings, but it's more important that they see the difference between internal and external factors.

The SWOT matrix can then be introduced as a way of identifying possible responses to identified opportunities and threats. Examples of completed SWOT matrices for specific businesses (eg a fast food business) could be given to learners so that they can understand the purpose of the process. Learners should then be asked to complete their own SWOT matrices from given information (ie completed SWOT analyses) which could have come from earlier exercises.

At this stage, learners could be asked to recommend a response without being told to consider competitor reactions. These could then be pointed out and learners could be asked to consider whether this would change their recommendation.

The marketing strategies available to businesses serve to illustrate the difficulties faced by businesses prior to deciding on their response to opportunities and threats. In themselves they serve to summarise many of the unit's themes and act as a way of tying these themes together. As models they should help learners to analyse and evaluate. However, as is the case with all models, learners should be encouraged to appreciate that these two models are only as useful as the data put into them, ie 'garbage in, garbage out'.

Finally, learners could be asked to assess the business opportunities and threats faced by the PLC they investigated in AO1. This could act as a revision exercise covering all aspects of the unit.

## Useful links and resources

### General

News reports on the competitive business environment:

- [bbc.co.uk/news/business/](http://bbc.co.uk/news/business/)
- [theguardian.com/uk/business](http://theguardian.com/uk/business)
- [businessweek.com/companies-and-industries](http://businessweek.com/companies-and-industries)
- [marketingweek.co.uk/](http://marketingweek.co.uk/)
- [businesscasestudies.co.uk](http://businesscasestudies.co.uk)

Enterprise and enterprising behaviour and business vision, aims and objectives:

- [enterprisenation.com/](http://enterprisenation.com/)
- [socialenterprise.org.uk/](http://socialenterprise.org.uk/)

Forms of business ownership:

- [co-operative.coop/enterprise-hub/](http://co-operative.coop/enterprise-hub/)
- [startupdonut.co.uk/](http://startupdonut.co.uk/)

Economic data:

- [economist.com/markets-data](http://economist.com/markets-data)
- [data.worldbank.org/topic/economy-and-growth](http://data.worldbank.org/topic/economy-and-growth)
- [bbc.co.uk/news/business/economy/](http://bbc.co.uk/news/business/economy/)
- [ons.gov.uk/ons/index.html](http://ons.gov.uk/ons/index.html)
- [oecd.org/statistics/](http://oecd.org/statistics/)

Identifying trends in the economic environment:

- [2.open.ac.uk/students/skillsforstudy/doc/working-with-charts-graphs-and-tables-toolkit.pdf](http://2.open.ac.uk/students/skillsforstudy/doc/working-with-charts-graphs-and-tables-toolkit.pdf)
- [bbc.co.uk/skillswise](http://bbc.co.uk/skillswise)

The impact of economic trends on business organisation:

- [tutor2u.net/](http://tutor2u.net/) (business related articles only)

The meaning and impact of competition

- [businessknowhow.com/marketing/knowncomp.htm](http://businessknowhow.com/marketing/knowncomp.htm)
- [en.wikipedia.org/wiki/Market\\_share](http://en.wikipedia.org/wiki/Market_share)
- [smartamarketing.wordpress.com/2011/03/28/market-dominance-strategy/](http://smartamarketing.wordpress.com/2011/03/28/market-dominance-strategy/)
- [tutor2u.net/business/strategy/competitive\\_advantage.htm](http://tutor2u.net/business/strategy/competitive_advantage.htm)
- [wikihow.com/Gain-a-Competitive-Advantage-in-Business](http://wikihow.com/Gain-a-Competitive-Advantage-in-Business)
- [businessknowhow.com/marketing/compadv.htm](http://businessknowhow.com/marketing/compadv.htm)
- [innovationresource.com/resources/seven-strategies/](http://innovationresource.com/resources/seven-strategies/)

The role of innovation in competitive markets:

- [management.about.com/od/businessstrategy/a/Innovation.htm](http://management.about.com/od/businessstrategy/a/Innovation.htm)
- [fastcompany.com/most-innovative-companies/2014/](http://fastcompany.com/most-innovative-companies/2014/)
- [nibusinessinfo.co.uk/sitemap/12276](http://nibusinessinfo.co.uk/sitemap/12276)

SWOT analysis and responding to opportunities and threats:

- [businessballs.com/swotanalysisfreetemplate.htm](http://businessballs.com/swotanalysisfreetemplate.htm)
- [quickmba.com/strategy/swot/](http://quickmba.com/strategy/swot/)



## 12.2 Unit 2: Marketing principles

<b>Title</b>	Marketing principles
<b>Unit number</b>	Y/506/6086
<b>Unit assessment type</b>	Externally assessed
<b>Guided learning hours</b>	90
<b>Transferable skill(s) contextualised within this unit</b>	n/a
<b>Resources required for this unit</b>	<ul style="list-style-type: none"> <li>• Computers with internet access.</li> <li>• Library or online library.</li> <li>• Access to journals.</li> </ul>
<b>Meaningful employer involvement</b>	It is a requirement that all learners undertake meaningful activity involving employers during their study and this activity will be scrutinised as part of our ongoing quality assurance activities with centres.
<b>Synoptic assessment and learning</b>	This unit is ideally delivered first alongside Unit 1. There are opportunities for learners to demonstrate synoptic knowledge and learning from Unit 1 in this unit.

### Aim and purpose

This unit is designed to provide an understanding of the key concepts and terminology of marketing and how it fits within the organisation.

### Unit introduction

This unit introduces the principles of consumer behaviour and the marketing environment. It identifies the elements of the marketing mix and how the mix is used to meet customer requirements. It will outline the role and function of marketing within organisations and identify the factors that influence consumer behaviour.

### Unit content

The role and function of marketing within organisations	
Marketing as an exchange process	<ul style="list-style-type: none"> <li>• Management process.</li> <li>• Identifying, anticipating and satisfying customer requirements.</li> <li>• Exchanges between the organisation, its customers and suppliers.</li> </ul>
Role of marketing in achieving customer satisfaction	<ul style="list-style-type: none"> <li>• Understanding customer expectations.</li> <li>• Making customer satisfaction a business objective.</li> <li>• Ensuring organisation practices secure customer retention.</li> </ul>
Importance of marketing as a cross-functional activity within the organisation	<ul style="list-style-type: none"> <li>• Internal service provision.</li> <li>• Link between organisation and the customer through multiple contact points.</li> <li>• Links between marketing and other functions for information sharing and other activities.</li> </ul>

### The role and function of marketing within organisations

The role of marketing for internal and external marketing	<ul style="list-style-type: none"> <li>• Internal and external customers, their needs and wants.</li> <li>• Development and delivery of communication activity.</li> <li>• Providing support to customers and the supply chain.</li> <li>• Providing information internally.</li> </ul>
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### Key components of the marketing environment and the factors that influence consumer behaviour

Customer needs and wants	<ul style="list-style-type: none"> <li>• Functional benefits.</li> <li>• Emotional benefits.</li> <li>• Physiological needs.</li> <li>• Social and cultural forces.</li> <li>• Luxury or necessity.</li> </ul>
Consumer buying process	<ul style="list-style-type: none"> <li>• Need recognition.</li> <li>• Information search and processing.</li> <li>• Identification and evaluation of alternatives.</li> <li>• Purchase decision.</li> <li>• Post-purchase evaluation.</li> <li>• Consideration of examples from a range of products and services.</li> </ul>
Influences on the consumer decision-making process	<ul style="list-style-type: none"> <li>• Social – social groups, virtual groups, family.</li> <li>• Cultural – subcultures, ethnicity, country of origin.</li> <li>• Personal influences - personal values, ethics.</li> <li>• People and personalities who influence decisions.</li> </ul>
Differences between consumer and business buyer behaviour	<ul style="list-style-type: none"> <li>• Emotional versus rational behaviour.</li> <li>• Purchase size and value.</li> <li>• Decision-making units.</li> <li>• Relationship status between organisation and buyers.</li> <li>• Marketing communication inputs.</li> </ul>
Elements of the macro environment	<ul style="list-style-type: none"> <li>• Political – governments and policies.</li> <li>• Economic – national economic activity, taxation.</li> <li>• Social – cultural, lifestyle changes.</li> <li>• Technological – digital communications, production and service technology.</li> <li>• Environmental – sustainability.</li> <li>• Legal – laws affecting organisations.</li> </ul>
Elements of the micro environment	<ul style="list-style-type: none"> <li>• Customers.</li> <li>• Competitors.</li> <li>• Suppliers.</li> <li>• Intermediaries.</li> <li>• General public.</li> </ul>

### Key components of the marketing environment and the factors that influence consumer behaviour

Elements of the internal environment	<ul style="list-style-type: none"> <li>• Resources – financial and non-financial.</li> <li>• Skills/people.</li> <li>• Equipment.</li> <li>• Systems/processes.</li> <li>• Internal elements enabling or restricting successful marketing.</li> </ul>
Importance of understanding the marketing environment	<ul style="list-style-type: none"> <li>• Basis for making decisions.</li> <li>• Knowledge of situation and changes.</li> <li>• Aid for planning.</li> <li>• Assessing strengths, weaknesses, opportunities and threats.</li> </ul>

### Collecting relevant information about the marketing environment

Sources of data	<ul style="list-style-type: none"> <li>• Differentiate between secondary and primary data.</li> <li>• Identify secondary data sources: <ul style="list-style-type: none"> <li>• relevant journals and trade publications</li> <li>• websites</li> <li>• market research reports</li> <li>• internal data</li> <li>• government data/statistics.</li> </ul> </li> </ul>
Methods used for quantitative research	<ul style="list-style-type: none"> <li>• Closed question surveys: <ul style="list-style-type: none"> <li>• face-to-face</li> <li>• telephone and mobile/smartphone</li> <li>• postal</li> <li>• online</li> <li>• omnibus.</li> </ul> </li> </ul>
Methods used for qualitative research	<ul style="list-style-type: none"> <li>• Individual depth interviews.</li> <li>• Panels.</li> <li>• Group discussions.</li> <li>• Internet based: <ul style="list-style-type: none"> <li>• online group discussions</li> <li>• chat rooms</li> <li>• social media research.</li> </ul> </li> </ul>
Data reliability	<ul style="list-style-type: none"> <li>• Source accuracy and bias.</li> <li>• Validity.</li> <li>• Timeliness.</li> </ul>

### Concept and elements of the marketing mix and how it is applied in different contextual settings

The 4Ps marketing mix	<ul style="list-style-type: none"> <li>• Product – goods and services delivering value.</li> <li>• Price – influence on demand and competition.</li> <li>• Promotion – communication with customers and markets.</li> <li>• Place – route to market and physical location.</li> </ul>
The extended marketing mix (7Ps)	<ul style="list-style-type: none"> <li>• People – role in satisfying customers.</li> <li>• Process – influence on effective delivery.</li> <li>• Physical evidence – tangible elements of delivery.</li> </ul>
Benefits of a coordinated marketing mix	<ul style="list-style-type: none"> <li>• Synergy – building together components to produce a larger benefit.</li> <li>• Corporate focus – full understanding about the organisation and products offered.</li> <li>• Budget economies – multiple touch points to produce greater effect.</li> <li>• Clear brand image.</li> <li>• Competitive advantage.</li> </ul>
The marketing mix and how it is used to meet customer needs and wants	<ul style="list-style-type: none"> <li>• Adaption of the mix to suit different customer requirements.</li> <li>• Emphasis of appropriate elements.</li> </ul>
Marketing mix elements for FMCG products	<ul style="list-style-type: none"> <li>• Non-durable product.</li> <li>• Price and place importance.</li> <li>• Mass promotion.</li> <li>• Customer as consumer.</li> </ul>
Marketing mix elements for business-to-business contexts	<ul style="list-style-type: none"> <li>• Price and negotiation.</li> <li>• Personal selling and trade promotion.</li> <li>• Relationships and service.</li> </ul>
Marketing mix requirements in the not-for-profit sector	<ul style="list-style-type: none"> <li>• Ideas and services rather than products.</li> <li>• Direct channel – dealing directly with customers/supporters.</li> <li>• Opportunity cost rather than price.</li> <li>• Emphasis on public relations.</li> </ul>
Marketing mix elements for services	<ul style="list-style-type: none"> <li>• Extended marketing mix.</li> <li>• Service quality.</li> </ul>

## Assessment outcomes

Learners will be required to apply, analyse and evaluate in relation to the following assessment outcomes:

### Assessment outcome 1: Investigate the role and function of marketing within organisations

- |   |   |
|---|---|
| a | Marketing as an exchange process.   |
| b | Role of marketing in achieving customer satisfaction.                           |
| c | Importance of marketing as a cross-functional activity within the organisation. |
| d | The role of marketing for internal and external marketing.                      |

### Assessment outcome 2: Assess key components of the marketing environment and the factors that influence consumer behaviour

- |   |  |
|---|--|
| a | Elements of the macro environment.                         |
| b | Elements of the micro environment.                         |
| c | Elements of the internal environment.                      |
| d | Importance of understanding the marketing environment.     |
| e | Consumer buying process.                                   |
| f | Customer needs and wants.                                  |
| g | Influences on the consumer decision making process.        |
| h | Differences between consumer and business buyer behaviour. |

### Assessment outcome 3: Investigate how to collect relevant information about the marketing environment

- |   |   |
|---|---|
| a | Sources of data.                        |
| b | Methods used for quantitative research. |
| c | Methods used for qualitative research.  |
| d | Data reliability.                       |

### Assessment outcome 4: Assess the concept and elements of the marketing mix and how it is applied in different contextual settings

- |   |  |
|---|--|
| a | The 4Ps marketing mix.   |
| b | The extended marketing mix (7Ps).                                      |
| c | Benefits of a coordinated marketing mix.                               |
| d | The marketing mix and how it is used to meet customer needs and wants. |
| e | Marketing mix elements for FMCG products.                              |
| f | Marketing mix elements for business-to-business contexts.              |
| g | Marketing mix requirements in the not-for-profit sector.               |
| h | Marketing mix elements for services.                                   |

## Assessment

This unit is assessed by an external examination set and marked by AQA. The examination takes place under controlled examination conditions and the exam date will be published at the start of each academic year.

Learners will be allowed to use a non-programmable scientific calculator in the examination.

The examination will consist of a written paper with two sections, A and B. Learners will have to complete both sections and there will be no optional questions within either section.

The examination will last 2 hours and the total number of marks available in the examination is 80.

Section A will be worth 50 marks and consist of relatively short questions based on the whole of the specification for this unit. The learners will be required to answer all of the questions in Section A.

Section B will be worth 30 marks and will include longer questions worth up to 15 marks each. The questions in Section B will not necessarily cover the whole of the specification for this unit at each assessment. The learners will be required to answer all of the questions in Section B.

AQA will ensure that the full content of the unit is covered equally over the life of the qualification.

## Synoptic assessment

Whilst there are no requirements to deliver units in a prescribed order, this is an underpinning knowledge unit and best delivered first and alongside Unit 1. There are opportunities for learners to demonstrate synoptic knowledge and learning from Unit 1 in this unit.

The following is a summary of the teaching and learning links that can be developed between Unit 2 Marketing principles and Unit 1 Competitive business environment.

### Unit 1 Competitive business environment

Learners understand how marketing fits within the business as a key function. Learners understand how the marketing of a business is affected by the external competitive environment and how this would impact upon a business's marketing strategy.

The grid below identifies specific opportunities for synoptic teaching and learning.

Performance criteria	Link unit reference	Description of the link
<b>AO2 A</b> Elements of the macro environment.	Unit 1: AO2 A UK and international economic data.	How the wider economic environment shapes the marketing environment and the factors influencing consumer behaviour and the marketing of the business.
<b>AO2 B</b> Elements of the micro environment.	Unit 1: AO3 A The meaning and impact of competition.	The importance of recognising the competitive environment when planning for the marketing of a business. The importance of being able to explain the impact that competitors can have on a business.
<b>AO4 A</b> Assess the concept and elements of the marketing mix and how it's applied in different contextual settings – the 4ps marketing mix.	Unit 1: AO1 D Business functions.	How the marketing mix relates to the broader promotional/sales function and the idea of business functions. How the marketing mix can be used and adapted by businesses in varying situations.

## Employer engagement guidance

Learners should have access to employers such as marketing agencies or marketing departments in local businesses. They should have an opportunity to explore the activities of these departments or agencies and align their learning to the real world.

## Delivery guidance

### Assessment outcome 1

Research how organisations use marketing as a means of identifying current and potential customer requirements. Learners should develop an understanding of the marketing used for the purpose of promoting products/services to customers and as a form of research. Learners should develop this by exploring how marketing can be used to obtain data for analysis.

Learners could participate in group activities where they discuss the marketing strategies of a range of different organisational types and the impact it has on organisational delivery of customer expectations whether they are internal or external to the organisation.

### Assessment outcome 2

Customer behaviour refers to the selection, purchase and consumption of goods and/or services for the satisfaction of their want. Learners could be given examples where organisations have proved successful (or not) with the sales of their products and/or services and then asked to consider how their success/failure links to the influence of the potential customers and their behaviours, eg the rising success of stores such as Aldi and Lidl. This can then lead on to the consumer buying process and what has influenced the consumer with respect to the decisions they made.

Learners need to understand that consumers and businesses have similar and very different behaviours. In small groups they could be asked to discuss examples of the similarities and differences.

Learners need to be aware of the terminology for macro and micro environments with respect to marketing. In particular, they need to be aware that the micro environment is the immediate environment that impacts a business whereas the macro environment includes those things that can have an impact on a small business over which they have no control. Learners should be encouraged to research the factors relevant to both environments and consider how they can have an effect on different organisational types and sizes and the models which support this, such as PESTLE.

It is important that learners consider the internal environment of an organisation and the features and functions of the various elements, such as resources, peoples, equipment etc.

Learners could work in small groups to discuss the internal and external forces which surround a business and the impact upon it (the marketing environment). They could select a particular organisation and then present the results of their discussions to the wider group.

### Assessment outcome 3

It is important that learners not only consider the sources of data that could be obtained for marketing purposes, but also what makes it reliable data, eg validity, accuracy, timeliness etc. It is important that data obtained for marketing purposes is accurate, relevant and up-to-date otherwise the results are useless to any organisation.

Learners could be asked to consider the different methods used for qualitative research and the data characteristics that it supports. They could then compare their considerations with the different methods used for quantitative research and the data characteristics that it supports. This could then lead on to the class working in small groups to analyse quantitative and qualitative data, how it could be used for marketing purposes and the characteristics it has in order to be classified as reliable data.

## Assessment outcome 4

Learners need to understand what is meant by the 4Ps of the marketing mix and what they represent. This can be through individual research or by working in small groups and feeding back to the wider group. They could then consider different marketing strategies of different organisations and how they have used the 4Ps. This could then be extended to the group researching the extension to the 4Ps (to become 7Ps) and discuss businesses which have used the 7Ps.

Learners should consider the benefits of having a coordinated marketing mix. They could use the organisations that they have previously studied to discuss whether a coordinated marketing mix has been used and, if so, how has it benefited the organisation and how it has met the needs of the consumer market.

Learners need to understand what is meant by Fast Moving Consumer Goods (FMCG) and the fact that they are sold quickly and at a relatively low cost. They could be given some examples and asked to summarise what main marketing mix elements have been used and why.

It is important that learners understand what is meant by a business-to-business context (an organisation which markets to other organisations and companies as opposed to consumers). The learners should be provided with examples, eg Oracle – the owner of Sun Microsystems, Adobe, CISCO, American Express launched ‘Open Forum’ a site to give advice to small business owners.

Learners need to be aware that different organisational types have different marketing mix requirements, eg third party or not-for-profit organisations who market ideas and services rather products. Class discussions could include a variety of not-for-profit organisations and their marketing mix requirements.

Finally, learners need to be aware of the marketing mix elements for services and the fact that it is an adaptation of the traditional 4Ps and even the 7Ps but also includes service quality.

## Useful links and resources

- Blythe J, *Essentials of Marketing*, 5th edition, Pearson, ISBN-13: 9780273757689, (2012)
- Mackay A and Wilmshurst J, *Fundamentals and Practice of Marketing*, Chartered Institute of Marketing, ISBN-10: 075065449X, ISBN-13: 978-0750654494, Routledge, 6 Aug 2002
- [businesscasestudies.co.uk/business-theory/marketing/the-principles-of-marketing.html](http://businesscasestudies.co.uk/business-theory/marketing/the-principles-of-marketing.html)



## 12.3 Unit 3: Customer communications

<b>Title</b>	Customer communications
<b>Unit number</b>	D/506/6087
<b>Unit assessment type</b>	Centre assessed and externally quality assured
<b>Recommended assessment method</b>	Practical assignment  This is the preferred assessment method for this unit. A centre may choose an alternative method of assessment, but will be asked to justify as part of the quality assurance process.
<b>Guided learning hours</b>	90
<b>Transferable skill(s) contextualised within this unit</b>	Research and communication (oral) <sup>5</sup>
<b>Resources required for this unit</b>	<ul style="list-style-type: none"> <li>• Internet enabled computers.</li> <li>• Flipchart and pens.</li> <li>• Sample advertising from newspapers and magazines.</li> </ul>
<b>Meaningful employer involvement</b>	It is a requirement that all learners undertake meaningful activity involving employers during their study and this activity will be scrutinised as part of our ongoing quality assurance activities with centres.
<b>Synoptic assessment and learning</b>	This unit is ideally delivered after the two examined units (ie Units 1 and 2) and alongside Units 4, 5, 6 and 7. There are opportunities for learners to demonstrate synoptic knowledge and learning from these other units in their evidence for this unit.

### Aim and purpose

This unit provides an understanding of the main elements of marketing communications and how they can be used in practice to engage with customers. Learners will explore customer relationship management, different communications methods and tools and will develop an outline marketing communications campaign. Learners will then assess how this could be actioned and evaluated.

### Unit introduction

This unit provides an understanding of the main elements of marketing communications and how they can be used in practice to engage with customers. Learners will explore customer relationship management, different communications methods and tools and will develop an outline marketing communications campaign. Learners will then assess how this could be actioned and evaluated.

This unit provides an opportunity to evidence achievement of the transferable skills of research and communication (oral).

<sup>5</sup>Please visit the specification homepage to access the Transferable skills standards and associated guidance and recording documentation.

## Unit content

### Understanding customers

Customer contexts	<ul style="list-style-type: none"> <li>• The market.</li> <li>• Market share.</li> <li>• Customers versus consumers.</li> <li>• Prospects versus customers.</li> </ul>
The role of segmentation and targeting	<ul style="list-style-type: none"> <li>• What is segmentation?</li> <li>• Benefits of segmentation (to the organisation and customers).</li> <li>• Criteria of an effective segment, eg measurable, identifiable, substantial, accessible, reached using a tailored marketing mix.</li> <li>• Main methods of consumer segmentation, eg geographic, demographic, geo-demographic, psychographic, behavioural, benefit.</li> <li>• Main methods of segmenting business markets, eg SIC, geographic location, size (employees/revenues).</li> <li>• Main target market strategies, eg concentrated, differentiated, undifferentiated.</li> </ul>
Characteristics of B2C customers	<ul style="list-style-type: none"> <li>• Types of consumers.</li> <li>• Influences on buying behaviour.</li> <li>• Product/service adoption (diffusion).</li> <li>• The consumer decision-making process.</li> </ul>
Characteristics of B2B customers	<ul style="list-style-type: none"> <li>• Types of business organisations.</li> <li>• Influences on organisational buying behaviour.</li> <li>• The organisational decision-making unit.</li> <li>• The business buying process.</li> </ul>

### The nature and importance of customer relationships

Types of customer relationships	<ul style="list-style-type: none"> <li>• Transactional relationships.</li> <li>• Longer term relationships.</li> <li>• Collaborative/partnership relationships.</li> </ul>
Customer relationships	<ul style="list-style-type: none"> <li>• Customer loyalty (definition and benefits).</li> <li>• The loyalty ladder.</li> <li>• Customer retention (definition and benefits).</li> <li>• Lifetime value of customer relationships.</li> <li>• What is customer relationship management (CRM)?</li> <li>• The use/role of technology in CRM.</li> <li>• The importance of customer satisfaction.</li> <li>• Defining customer service needs.</li> </ul>
Tools to manage and develop customer relationships	<ul style="list-style-type: none"> <li>• Use of data in managing customer relationships.</li> <li>• Use of segmentation.</li> <li>• Managing relationships based on customer value.</li> <li>• Key role of marketing communications in managing customer relationships (personalisation).</li> <li>• Importance of branding.</li> </ul>

### The nature and importance of customer relationships

Monitoring customer satisfaction	<ul style="list-style-type: none"> <li>• Use of 'customer satisfaction index'.</li> <li>• Monitoring complaints.</li> <li>• Feedback from defecting customers.</li> <li>• Benchmarking against competitors.</li> <li>• Use of market research (questionnaires and focus groups).</li> <li>• Mystery shoppers.</li> </ul>
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### The purpose and process of marketing communications

Marketing communications fit within the overall marketing mix	<ul style="list-style-type: none"> <li>• Definition of external communications.</li> <li>• Brief explanation of the marketing mix.</li> <li>• Importance of developing an appropriate marketing mix.</li> <li>• Relationship between communications and other mix elements.</li> </ul>
Role and benefits of external marketing communications	<ul style="list-style-type: none"> <li>• The use of marketing communications to differentiate, reinforce, inform, persuade (DRIP).</li> <li>• The benefits of effective marketing communications, eg consistency, branding, better use of resources (finance and people).</li> <li>• Implementing the AIDA model.</li> </ul>
External marketing communications campaigns	<ul style="list-style-type: none"> <li>• Consider factors in the external environment.</li> <li>• Review competitor activities.</li> <li>• Consider the target market characteristics.</li> <li>• Ensure fit with the organisation's brand and values.</li> <li>• Communications strategy (push, pull, profile).</li> </ul>
Role and importance of marketing communications objectives	<ul style="list-style-type: none"> <li>• Use and role of objectives.</li> <li>• Typical marketing communications objectives.</li> <li>• Fit with corporate objectives and marketing objectives (hierarchy of organisational objectives).</li> <li>• The role of setting objectives in performance monitoring and management.</li> </ul>

**Different marketing communications tools**

The marketing communications mix	<ul style="list-style-type: none"> <li>Define the marketing communications mix.</li> <li>Uses of the marketing communications mix.</li> <li>The categories of tools within the marketing communications mix: advertising, personal selling, sales promotion, public relations and direct marketing.</li> <li>The importance of using a range of tools.</li> <li>Above the line and below the line.</li> </ul>
The uses of advertising, sales promotion and public relations (PR) within a marketing communications campaign	<ul style="list-style-type: none"> <li>Types of advertising.</li> <li>Uses of advertising.</li> <li>Sales promotions defined.</li> <li>Uses of sales promotions to prompt purchase, retention and additional spend.</li> <li>PR defined.</li> <li>Uses of PR.</li> </ul>
Direct marketing and personal selling	<ul style="list-style-type: none"> <li>Main methods of direct marketing (eg direct mail, direct response advertising, email, online).</li> <li>Benefits of direct marketing, eg lower costs, campaigns are trackable, targeted campaigns, resource efficiency.</li> <li>When it might be used, eg existing customers, new business acquisition, promoting new products, cross-selling, customer loyalty programmes.</li> <li>Use of data, eg importance of keeping the data up to date, confidentiality, security.</li> <li>Face-to-face, selling and telesales.</li> <li>Business and consumer contexts of personal selling.</li> </ul>
Online and social media marketing communications tools	<ul style="list-style-type: none"> <li>Online tools used in marketing communications.</li> <li>Use of social media in marketing communications.</li> <li>The uses of online/social media tools.</li> <li>Key benefits, issues and considerations.</li> </ul>

**Developing an outline marketing communications campaign**

SMART objectives for a communications campaign	<ul style="list-style-type: none"> <li>Define SMART objectives.</li> <li>The importance of objectives in campaign planning and management.</li> <li>Deciding on objectives.</li> </ul>
Messaging for a marketing communications campaign	<ul style="list-style-type: none"> <li>Messaging defined.</li> <li>The importance of the communications message.</li> <li>Fit with values/brand.</li> <li>Key decisions when determining an appropriate message for a campaign.</li> </ul>
Recommendations for an appropriate marketing communications mix for a campaign	<ul style="list-style-type: none"> <li>Understanding the target market.</li> <li>Aligning the message.</li> <li>Ensuring fit against the desired objectives.</li> <li>Fit with other elements of the marketing mix.</li> </ul>

### Putting into practice a marketing communications campaign

Scheduling and resourcing a marketing communications campaign	<ul style="list-style-type: none"> <li>• The importance of internal communications.</li> <li>• Ensuring alignment of stakeholders.</li> <li>• Briefing 'customer-facing' staff.</li> <li>• The role of external agencies.</li> <li>• Define the 'media schedule'.</li> <li>• Considerations when scheduling activities.</li> <li>• Integration of marketing communications activities.</li> <li>• Ensuring consistency (of message and against brand values).</li> </ul>
Budgeting for a marketing communications campaign	<ul style="list-style-type: none"> <li>• Role and importance of budgeting in planning a marketing communications campaign.</li> <li>• Setting the budget, eg objective/task method, competitive parity, percentage of sales, affordability, incremental, zero-based.</li> <li>• Key influences on the budget.</li> <li>• Issues in managing the budget (and performance against the budget).</li> </ul>
Measuring and evaluating the effectiveness of a campaign	<ul style="list-style-type: none"> <li>• The importance of monitoring and evaluating a campaign.</li> <li>• Measuring the effectiveness of advertising (eg recognition, recall, impact on brand), PR (eg advertising value equivalent), direct marketing (eg numbers of responses), online and social media tools (eg direct responses, follows, visits, likes).</li> <li>• Reviewing effectiveness against objectives and budgets.</li> </ul>

## Performance outcomes

On successful completion of this unit learners will be able to:

Performance outcome 1:	Understand customers.
Performance outcome 2:	Explore the nature and importance of customer relationships and how to build them.
Performance outcome 3:	Explore the purpose and process of marketing communications.
Performance outcome 4:	Understand different marketing communications tools.
Performance outcome 5:	Develop a marketing communications campaign.
Performance outcome 6:	Illustrate how the marketing communications campaign will be put into practice.

## Grading criteria

Performance outcomes	Pass	Merit	Distinction
	<b>To achieve a pass the learner must evidence that they can:</b>	<b>In addition to the pass criteria, to achieve a merit the evidence must show the learner can:</b>	<b>In addition to fulfilling the pass and merit criteria, to achieve a distinction the evidence must show that the learner can:</b>
<b>PO1 Understand customers</b>	<b>P1</b> Describe customers in four different contexts.	<b>M1</b> Compare and contrast the characteristics of B2B and B2C.	
	<b>P2</b> Explore the role of customer segmentation and targeting, explaining how the criteria and methods used identify different customer groups.	<b>M2</b> Examine and summarise how segmentation can benefit an organisation and its customers.	
<b>PO2 Explore the nature and importance of customer relationships and how to build them</b>	<b>P3</b> Research and explain with examples the <b>three</b> different types of customer relationships.	<b>M3</b> Analyse <b>three</b> different tools that can be used to manage the relationships.	<b>D1</b> Evaluate <b>three</b> different ways in which the use of technology has changed the nature of CRM.
	<b>P4</b> Explore the benefits to an organisation of managing customer relationships providing <b>three</b> examples.	<b>M4</b> Analyse <b>three</b> examples of data that could be used to monitor and develop customer relationships.	
<b>PO3 Explore the purpose and process of marketing communications</b>	<b>P5</b> Explain how marketing communications fit within the overall marketing mix.		
	<b>P6</b> Describe <b>four</b> competitor activities that influence external marketing communications.	<b>M5</b> Explain the role and benefits of external marketing communications in terms of DRIP.	<b>D2</b> Compare and contrast communication marketing approaches used by <b>two</b> external organisations competing for the same product.

Performance outcomes	Pass	Merit	Distinction
<b>P04</b> <b>Use different marketing communications tools</b>	<b>P7</b> Describe the various uses of: <ul style="list-style-type: none"> <li>• advertising</li> <li>• sales promotion</li> <li>• public relations within a marketing communications campaign.</li> </ul>		
	<b>P8</b> <b>Research</b> the uses of online and social media marketing communications tools, providing <b>three</b> examples.	<b>M6</b> Investigate <b>two</b> benefits and <b>two</b> uses of direct marketing and of personal selling.	
	<b>P9</b> Explain why it is important to keep data: <ul style="list-style-type: none"> <li>• up-to-date</li> <li>• confidential</li> <li>• secure.</li> </ul>		
<b>P05</b> <b>Develop a marketing communications campaign</b>	<b>P10</b> Identify SMART objectives for a specific communications campaign for a selected business.		
	<b>P11</b> Produce and <b>present</b> a clear message using a mix of marketing communications for a campaign for a selected business.		

Performance outcomes	Pass	Merit	Distinction
<b>PO6</b> <b>Illustrate how the marketing communications campaign will be put into practice</b>	<b>P12</b> Schedule a marketing communications campaign for a selected business and identify the resources needed to support it.	<b>M7</b> Produce a budget for a marketing communications campaign for a selected business.	<b>D3</b> Justify the proposed budget in relation to the expected outcomes for a selected business.
	<b>P13</b> Explain how the effectiveness of the marketing communications campaign could be measured and evaluated.		

## Assessment amplification

This section provides amplification of what is specifically required or exemplification of the responses learners are expected to provide.

**In completing P8, learners will be presented with an opportunity to demonstrate the transferable skill of research.**

**In completing P11, learners will be presented with an opportunity to demonstrate the transferable skill of communication (oral).**

The assessment of this unit may well benefit from a project style approach following a marketing communications campaign through from concept to evaluation.

The knowledge component of the unit could be delivered through the production of a corporate video that promotes the services of a marketing company to the business that will be the clients for PO5 and PO6. Alternatively PO1, PO2, PO3 and PO4 could provide an opportunity for extended writing.

The context of the plan developed and discussed in PO5 and PO6 can be any organisation/product or service, but the learning will be optimised where the context and the marketing communications objectives are concise and focused. For example, a plan to increase school visits to a tourist attraction, or a retailer launching a new outlet. A plan to increase overall sales for a major company would be complex and not easily adapted to this level of assessment.

Through exploring segmentation, reviewing current marketing communication and developing a specific campaign, learners should be encouraged to follow their own interests and explore innovative approaches.

For **P2** learners should explain that a segment should be measurable, identifiable, substantial, accessible and reached using a tailored marketing mix. They should also illustrate, using at least two examples, the main methods of consumer segmentation, ie geographic, demographic, geo-demographic, psychographic and behavioural.

For **M4** learners should use one clear example which should illustrate the customer data that could be recorded and explain how at least three elements of this customer data could be used to monitor and develop the customer relationship.



For **P12** learners should produce a single schedule for their campaign that uses at least three communication tools and clearly states the timing of each (eg when the advertisements will run) and an outline of non-financial resources (eg web designer, graphic designer, copywriter, exhibition staff). This can be in a table, a spreadsheet or another appropriate format.

## Synoptic assessment

Whilst unit order is not prescribed, this unit is best delivered after the two examined units (ie Units 1 and 2) and alongside any of the following units: 4, 5, 6 and 7. There are opportunities for learners to demonstrate synoptic knowledge and learning from these other units in their evidence for this unit.

The following is a summary of the teaching and learning links that can be developed between Unit 3 Customer communications and these other units.

### Unit 1 Competitive business environment

Learners understand the idea of business functions, objective setting and the place of marketing within the overall set of business functions through an analysis of the purpose of the marketing and communications function.

### Unit 2 Marketing principles

Learners understand how the ideas of customer segmentation, the importance of defined customer relationships and the use of a range of different marketing communications tools proceed from a broader understanding of the purpose of marketing and the expression of customer needs and wants.

### Unit 4 Digital essentials

Learners understand the uses of social networks and virtual communities. They understand the different promotional elements and the factors surrounding their mix that are necessary for an effective digital communications campaign. They also understand the need for businesses to incorporate SMART objectives at all levels of their planning both online and offline.

### Unit 5 Responsible business practices

Learners understand the role of customers as a key stakeholder for business and why businesses need to be aware of any social and ethical issues that concern customers in order to overcome them to maintain the customer relationship.

### Unit 6 Marketing research

Learners understand the way in which the practical development of customer relationships can be aided and enhanced by the assistance of the external market research organisation and the benefits of a customer database.

### Unit 7 Stakeholder engagement

Learners understand the need for businesses to retain customers and develop customer loyalty to benefit the business. Learners also understand the different methods that they are able to use in order to communicate with the external stakeholders of an organisation.

The amplification below identifies specific opportunities for synoptic teaching and learning. It also identifies where the centre should consider synoptic assessment.

Performance criteria	Link unit reference	Description of link
<b>P2</b> Explore the role of customer segmentation and targeting explaining how the criteria and methods used identify different customer groups.	Unit 2: AO1 B Role of marketing in achieving customer satisfaction.	How the concepts and criteria underpinning market segmentation and targeting are aspects of the broader role of marketing which seeks to identify, specify and serve customer expectation.
<b>P3</b> Research and explain with examples the three different types of customer relationships.	Unit 2: AO2 E and F Consumer buying process and customer needs and wants.	The importance of businesses understanding customers' needs and wants in order to build lasting and loyal customer relationships.
	Unit 5: PO2 P4 Ethical concerns.	How the ethical and social concerns of stakeholders are a part of the wider business objective of building sound and sustainable relationships with business customers.
	Unit 5: PO3 P5 Social concerns.	
	Unit 6: PO2 P4 Roles and uses of external market research agencies: purposes, types and benefits.	How the purpose of an external market research organisation is to offer services to the business to aid their development and management of customer relationships.
	Unit 6: PO2 P5 Uses and benefits of a customer database.	The importance to business of using customer databases in order to target marketing more effectively, therefore, enabling a business to build, maintain and develop customer relationships more efficiently.
<b>P4</b> Explore the benefits to an organisation of managing customer relationships, providing three examples.	Unit 7: PO4 P7 The importance of building stakeholder relationships: transactions vs relationships.	The importance of an organisation's relationship with their customers as a key stakeholder, and the purpose of the ladder.
	Unit 6: PO2 P4 Roles and uses of external market research agencies: purposes, types and benefits.	How the purpose of an external market research organisation is to offer services to the business to aid their development and management of customer relationships.
	Unit 6: PO2 P5 Uses and benefits of a customer database.	The importance to business of using customer databases in order to target marketing more effectively, therefore, enabling a business to build, maintain and develop customer relationships more efficiently.

Performance criteria	Link unit reference	Description of link
<b>P5</b> Explain how marketing communications fit overall within the marketing mix.	Unit 1: AO1 D Business functions.	How marketing communications' relationship with the overall marketing mix is itself a part of the wider decisions a business needs to make in relation to its product mix and the way in which it chooses to promote its products and/or services.
<b>P7</b> Describe the various uses of: <ul style="list-style-type: none"> <li>• advertising</li> <li>• sales promotion</li> <li>• public relations within a marketing communications campaign.</li> </ul>	Unit 1: AO1 D Business functions.  Unit 2: AO4 A The 4Ps of the marketing mix.  Unit 4: PO5 P9 Tactical communication mix: eg SEO, search advertising etc.  Unit 7: PO5 P9 The importance of the message in the communication process.	How the uses of different marketing tools are related to business function and context, and the way in which the business chooses to manage its delivery of products and/or services.  How the ways in which a business promotes itself through eg, advertising, sales promotion and public relations fits with the overall picture of the marketing mix (ie alongside product, price and place).  How a variety of promotional communications are used and how they might be deployed in a communications mix suitable for a specific market segment.  The different methods of communicating with external stakeholders and the importance of tailoring that message for the stakeholder group.
<b>P8</b> Research the uses of online and social media marketing communications tools, providing three examples.	Unit 1: AO3 F The role of innovation in competitive markets; how technological development supports innovation.  Unit 4: PO2 P4 Social networks and virtual communities and how they influence the consumer.  Unit 4: PO5 P9 Tactical communication mix: eg SEO, Search advertising etc.	How technology and the development of new technology (such as social media communications tools) can support a business in a competitive market to help maintain a competitive advantage.  How businesses use social networks and virtual communities in order to influence the consumer.  How a variety of promotional communications are used and how they might be deployed in a communications mix suitable for a specific market segment.

Performance criteria	Link unit reference	Description of link
<b>P10</b> Identify SMART objectives for a specific communications campaign for a selected business.	Unit 1: AO1 B Business, vision, aims and objectives.	The importance of objective setting for business activity – not just for the whole business, but also at department level. The specific purpose and importance of marketing objectives should be emphasised where learners are required to develop a marketing campaign.
	Unit 4: PO5 P8 Purpose of a digital marketing campaign.	How SMART objectives are relevant to all levels of business planning (including digital marketing campaigns).

## Employer engagement guidance

High profile local business, chambers of commerce, Federation of Small Businesses and local advertising, marketing and online agencies could be approached to provide guest speakers.

## Delivery guidance

The overarching themes for this unit are understanding customers and communicating with customers to achieve marketing objectives. Learners should already have a customer-centric awareness of marketing communications, although this may be for a narrow range of product/services and tools. Learners will benefit from exploring a wide range of marketing materials and campaigns for contemporary products and services. Through this unit they will begin to understand the concepts of customer segmentation and relationship management. From this foundation they can then take a planned approach to communicating with customers to achieve awareness, sales and loyalty.

## Performance outcome 1

Organisations vary enormously and their customers may be buying a product or service, but they could also be making a donation to a charity, paying student fees to a university or being persuaded to stop smoking. All organisations have a need to satisfy customers and customers come in all shapes and sizes within these various contexts.

Understanding the different types of customers and the way markets are segmented will help marketing practitioners to successfully target communications campaigns. 'What is meant by a segment' is the starting point and then the traditional segmentation methods can be used to describe different segments. Learners can consider the segments that they fit into and how this might shape their buying habits. A range of well-known products can be used to illustrate segmentation from the organisation's perspective, for example confectionary (eg from Yorkie Bars to Green and Blacks organic chocolate), soft drinks or clothing brands. Learner's organisational buying experience will be limited but learners can discuss the decision-making processes that the centre might use when investing in new classroom technology.

Learners should be able to segment customers, differentiate between the characteristics of B2C and B2B situations and explain the factors that influence buying behaviour. Real examples and contexts should be explored – such as the components in a car being sourced from different suppliers to make the final version sold to the consumer, or the different products purchased by hair salons to be used on the consumer as part of the service they provide.

International B2B and B2C should also be considered and any additional identified issues discussed.

## Performance outcome 2

Learners will consider the concept of customer relationship management and explain how this is used to understand customer satisfaction and behaviour and to build loyalty.

Technological advances mean that, for many of our purchases, organisations know a great deal about us; our demographic profile, our opinions and our spending patterns. Learners will, for example, benefit from researching the discreet data gathering tools, such as loyalty cards and the data that is collected to profile customer types, understand customer needs and thereby offer appropriate products and services. The underlying concepts of customer retention, loyalty and the lifetime value of the customer are key discussion points here. For example, learners can discuss their total spend over a period of time in supermarkets, fast food outlets or clothing stores, and with online outlets such as Amazon and iTunes. It is always stated that it costs an organisation much more to gain a new customer than it does to retain an existing one.

Customer loyalty and word of mouth recommendations are dependent on a good level of satisfaction and marketing research is used to measure and monitor satisfaction. This is a key tool for successful marketing.

## Performance outcome 3

Marketing is the ‘management process of identifying, anticipating and satisfying customer needs profitably’ (CIM) and so an organisation’s marketing communications forms just one part of the overall plan to meet customer needs. For example, if the price is perceived as extortionate then no amount of advertising is going to meet objectives. Or if customer review websites give the product or service a poor rating then the effectiveness of the organisation’s online campaigns will probably be reduced. Marketing communications therefore fits into the wider picture of marketing activities as described by the marketing mix (7Ps).

The purpose of marketing communications may be to generate sales, but consumer decision making is complex and so the objectives could be to raise awareness, build reputation or change behaviour. Investigating a range of contemporary campaigns will provide a basis for discussion about target markets and desired outcomes. The AIDA model (attention, interest, desire and action) can be used to review and explain the content of campaigns. Learners should also consider the principles of push and pull campaigns and how they may work together to deliver results.

Decisions about marketing communications are influenced by a wide range of external factors such as the general health of the economy or the level of competitor activity that an organisation faces. Learners should be able to review key external factors and explain how these may influence the purpose and process of marketing communications.

Learners will be able to explain the role and purpose of marketing communications; where they fit in with wider marketing activities and how they are used to help to achieve business objectives.

## Performance outcome 4

In today's world it is said that we are exposed to hundreds, if not thousands, of promotional messages every day. In recent decades the range of tools available for marketing communications has grown significantly; satellite and digital TV channels, the huge growth of ecommerce, the innovative use of social media and the growth of email marketing.

Having considered segmentation and target markets, and the desired outcomes for marketing communications, the discussion now moves on choosing the right tools and media. Learners should be able to describe all of the main categories of tools: advertising, personal selling, sales promotion, public relations and direct marketing. They should also be able to identify the specific tools within these (eg TV and radio advertising, press and magazine advertising, outdoor advertising and online advertising). In doing this they will become aware of the complex choices that marketing executives and managers face in planning marketing communications.

Learners should discuss the relative merits of these tools based on factors such as cost, ease of use, flexibility, suitability for target market and suitability for the message. They should also consider how these may work together to deliver results. For example, bus advertising may direct prospective customers to a website or a call centre. An email campaign may be linked with a money-off promotion.

Learners will recognise that marketing communication tools often work together to achieve results. They will outline the features and uses of a range of traditional and digital tools.

## Performance outcome 5

Learners will set objectives for a campaign and recommend the tools to be used for that campaign.

This outcome puts all of the above concepts into practice. Learners can be allocated a scenario by tutors or can choose their own organisation/products/services for their campaigns. What is important is that they work through the campaign planning process and recommend a plausible and justifiable campaign. They should set campaign objectives, relating to sales, awareness, retention etc. and their objectives should be 'SMART'. They should then consider the core message for their campaign and be able to explain why it fits the organisation and its brand.

The learner can then recommend the tools to use in the communications mix, drawing on the analysis of merits discussed in PO4.

## Performance outcome 6

Learners will set a budget and prepare a timing schedule for the campaign. They should be able to explain how the effectiveness of the campaign could be monitored.

Building on the recommendations made in PO5, learners should outline the delivery of their campaign showing timings and costings. The timings should be discussed in the context of the response they wish to generate, eg if this is to sell a holiday then the activity will need to generate an enquiry in the weeks or months leading up to that holiday. Learners should also explain the non-financial resources that may be required to ensure that the campaign runs smoothly. For example, front line staff will need to be briefed to expect a response and IT staff may need to add content to a website.

The budget for marketing communications may be set and agreed in a number of ways and these can be discussed. The learners can then consider if the budget for their campaign is appropriate and likely to enable the objective(s) to be met. Marketing students often shy away from the financial detail but the ability to make robust investment decisions is highly valued in the workplace. Scenarios should be discussed to ensure that the proposed investment in marketing communications is likely to achieve the desired results and that this represents a reasonable return on the overall investment.

Finally, students should consider how they will monitor the effectiveness of their campaign through tracking changes in sales levels, gathering data at the point of purchase or conducting market research.

## Useful links and resources

- Fill C, *Marketing Communications*, ISBN-10: 0273770543, ISBN-13: 978-0273770541, Pearson, 6th edition, (25 April 2013)
- Egan J, *Marketing Communications*, 2nd edition, SAGE, ISBN-13: 9781446259030, (2015)
- Blythe J, *Essentials of Marketing*, 5th edition, Pearson, ISBN-13: 9780273757689, (2012)
- Smith P R, and Zook Z, *Communications: Integrating offline and online with social media*, 5th edition, Kogan Page, ISBN-13: 9780749461935, (2011)
- [cimmarketingexpert.co.uk/](http://cimmarketingexpert.co.uk/)
- [mindtools.com](http://mindtools.com)
- [businessballs.com](http://businessballs.com)
- [businesscasestudies.co.uk](http://businesscasestudies.co.uk)
- [tutor2u.net/blog/index.php/business-studies/comments/qa-what-is-market-segmentation](http://tutor2u.net/blog/index.php/business-studies/comments/qa-what-is-market-segmentation)
- [businessballs.com/crmcustomerrelationshipmanagement.htm](http://businessballs.com/crmcustomerrelationshipmanagement.htm)
- [independent.co.uk/news/business/sme/how-customer-relationship-management-systems-can-be-of-benefit-to-your-business-451821.html](http://independent.co.uk/news/business/sme/how-customer-relationship-management-systems-can-be-of-benefit-to-your-business-451821.html)
- [ipa.co.uk/effectiveness](http://ipa.co.uk/effectiveness)
- [cim.co.uk/files/marcomms.pdf](http://cim.co.uk/files/marcomms.pdf)
- [smartinsights.com/](http://smartinsights.com/) (some free resources)
- [marketingteacher.com/marketing-budget/](http://marketingteacher.com/marketing-budget/)
- [cimmarketingexpert.co.uk/wp/?wpid=3944](http://cimmarketingexpert.co.uk/wp/?wpid=3944) (CIM members).



## 12.4 Unit 4: Digital essentials

<b>Title</b>	Digital essentials
<b>Unit number</b>	D/506/6090
<b>Unit assessment type</b>	Centre assessed and externally quality assured
<b>Recommended assessment method</b>	Practical assignment  This is the preferred assessment method for this unit. A centre may choose an alternative method of assessment, but will be asked to justify as part of the quality assurance process.
<b>Guided learning hours</b>	90
<b>Transferable skill(s) contextualised within this unit</b>	Research <sup>6</sup>
<b>Resources required for this unit</b>	<ul style="list-style-type: none"> <li>• Internet enabled computers.</li> <li>• Flipchart and pens.</li> <li>• Word-processing, spreadsheet and presentation software.</li> <li>• Note-taking software (eg Evernote, Google Keep, OneNote).</li> <li>• Mind-mapping software (eg Coggle, Freemind).</li> <li>• Free online research software (eg Searchmetrics, SimilarWeb, Alexa).</li> <li>• Flowchart software (eg gliffy, LucidChart).</li> </ul>
<b>Meaningful employer involvement</b>	It is a requirement that all learners undertake meaningful activity involving employers during their study and this activity will be scrutinised as part of our ongoing quality assurance activities with centres.
<b>Synoptic assessment and learning</b>	This unit is ideally delivered after the two examined units (ie Units 1 and 2) and alongside Units 3, 5, 6 and 7. There are opportunities for learners to demonstrate synoptic knowledge and learning from these other units in their evidence for this unit.

### Aim and purpose

This unit provides an understanding of the key concepts associated with digital marketing.

### Unit introduction

In this unit the digital marketing environment is explored. The impact of changing digital environment is considered in relation to the customer and the digital tools used for communications. The importance of digital content is recognised in the context of digital campaigns, as well as the need to monitor performance.

This unit provides an opportunity to evidence achievement of the transferable skill of research.

<sup>6</sup>Please visit the specification homepage to access the Transferable skills standards and associated guidance and recording documentation



## Unit content

### Defining what is meant by digital marketing

Key characteristics of digital marketing	<ul style="list-style-type: none"> <li>• Use of digital media channels.</li> <li>• Putting the customer at the centre of online processes.</li> <li>• Maintaining a constant dialogue with customers.</li> <li>• Use of databases and CRM.</li> </ul>
Digital marketing strategies versus traditional marketing strategies	<ul style="list-style-type: none"> <li>• Mass vs niche – digital messages are more easily adapted/individualised.</li> <li>• Push vs pull – digital promotion is generally consumer rather than company driven.</li> <li>• Permission marketing.</li> <li>• 24/7 global audience.</li> </ul>
The role of the 'Crowd' in digital marketing	<ul style="list-style-type: none"> <li>• Crowd-sourcing – generating ideas or solutions by asking a large number of people to share their ideas (eg Wikipedia, Threadless).</li> <li>• Crowd-funding – sourcing capital for business ventures by gathering small amounts of money from a large number of people (eg Kickstarter).</li> <li>• Micro-tasking – breaking down large complex projects into many small simple tasks and asking a large number of people to carry them out (eg Mechanical Turk).</li> </ul>
The internet and how it has changed consumers media consumption and habits	(eg) <ul style="list-style-type: none"> <li>• Two way communications.</li> <li>• Limited attention spans.</li> <li>• Information overload.</li> <li>• Time poverty.</li> <li>• Dual screening and multitasking.</li> </ul>

### The key factors that influence the digital consumer

The use of the internet and customer's expectations of, and concerns about, online transactions	<ul style="list-style-type: none"> <li>• Motivation for going online (education/entertainment/social/news).</li> <li>• Chaffey's 6 Cs – content, customisation, community, convenience, choice, cost.</li> <li>• Expectations – speed, range of products/services etc.</li> <li>• Concerns – security, lack of control, losing face.</li> </ul>
Online buying process versus offline purchasing	<ul style="list-style-type: none"> <li>• Off-line purchasing – problem recognition, information search, evaluation of alternatives, purchase decision, post-purchase behaviour, compared with Chaffey and Smith's online buying process: awareness, findability, evaluation, decision, purchase, support, rewards.</li> <li>• Adapting the sales funnel to digital contexts.</li> </ul>
Social networks and virtual communities and how they influence the consumer	(eg) <ul style="list-style-type: none"> <li>• Benefits of customer loyalty.</li> <li>• Loyalty drivers.</li> <li>• Switching.</li> <li>• eCRM.</li> <li>• C2C and C2B formats.</li> <li>• Digital tribes – communities with shared interests.</li> </ul>

### The key factors that influence the digital consumer

Techniques for researching online consumers	(eg) <ul style="list-style-type: none"> <li>• Primary and secondary research.</li> <li>• Use of web analytics.</li> <li>• Traditional market research tools and techniques.</li> <li>• Developing personas/scenarios.</li> </ul>
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### Defining the key digital marketing communications tools

Content-based digital communications tools	(eg) <ul style="list-style-type: none"> <li>• YouTube.</li> <li>• Embedded video.</li> <li>• Blogs.</li> <li>• Website landing pages.</li> <li>• Wikis.</li> <li>• Podcasts.</li> <li>• Widgets.</li> </ul>
Options for search-based digital marketing	<ul style="list-style-type: none"> <li>• PPC.</li> <li>• SEO.</li> <li>• Advantages and disadvantages.</li> <li>• Google Adwords.</li> <li>• Other search sites – eg Yahoo, Bing.</li> </ul>
Mobile digital communications tools	<ul style="list-style-type: none"> <li>• Apps.</li> <li>• Location-based communications.</li> <li>• SMS.</li> <li>• QR Codes.</li> </ul>
Social networks and their use for digital marketing communications	<ul style="list-style-type: none"> <li>• Professional sites – eg LinkedIn, Xing.</li> <li>• Micro-blogging sites – eg Twitter.</li> <li>• Facebook.</li> <li>• Google +</li> <li>• International and niche outlets - eg Weibo, Vkontaktia.</li> <li>• Trends and emerging formats – eg Pinterest, Vine.</li> </ul>

### Developing digital marketing content

Digital marketing content compared with traditional marketing content	<ul style="list-style-type: none"> <li>• The shift to a more soft-selling approach with brand/marketer needing to think like a publisher rather than an advertiser.</li> <li>• Focus on value and interest.</li> <li>• Attracting an audience with valuable and interesting content vs buying an audience through traditional mass media advertising slots in prime time media.</li> <li>• 'Always on' nature of digital content.</li> <li>• Hofacker's five stages framework – exposure, attention, comprehension/perception, yielding/acceptance, retention as an alternative to the older AIDA model.</li> </ul>
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### Developing digital marketing content

Key steps for producing successful digital marketing content	<ul style="list-style-type: none"> <li>• Understand the customer – what they value and the problems they need to solve.</li> <li>• Consider the customer's needs in terms of information and/or entertainment.</li> <li>• Link this knowledge to the organisation's expertise.</li> <li>• Explore relevant media types.</li> <li>• Develop or curate specific content for different media.</li> <li>• Update content regularly.</li> <li>• Link content to easy purchasing processes.</li> </ul>
The use of different forms of digital marketing content	<ul style="list-style-type: none"> <li>• Expensive but longer lasting (stock) content vs cheaper and quickly dated (flow) content.</li> <li>• Entertain/inspire/educate/convince (Bosomworth's framework).</li> <li>• Formats:               <ul style="list-style-type: none"> <li>• virals/quizzes/games/competitions</li> <li>• infographics/e-books/guides/trend reports</li> <li>• webinars/interactive demos/case studies</li> <li>• reviews/ratings/events/endorsements.</li> </ul> </li> </ul>
The participative nature of digital content development	<ul style="list-style-type: none"> <li>• Consumer generated content.</li> <li>• Consumers part in brand stories.</li> <li>• Content sharing.</li> <li>• Discussions and forums.</li> </ul>

### Developing an outline digital marketing campaign

Purpose of a digital marketing campaign	<ul style="list-style-type: none"> <li>• Setting objectives.</li> <li>• Reach, act, convert, engage.</li> <li>• Acquisition/retention.</li> <li>• Links to off-line marketing.</li> </ul>
Digital marketing mix	<ul style="list-style-type: none"> <li>• 7Ps in a digital context.</li> </ul>
Tactical communication mix	<ul style="list-style-type: none"> <li>• SEO.</li> <li>• Search advertising.</li> <li>• Online advertising.</li> <li>• Affiliate marketing.</li> <li>• Video marketing.</li> <li>• Social media.</li> <li>• Email marketing.</li> <li>• Mobile marketing.</li> <li>• Website design.</li> </ul>
Campaign content aimed at a specific market segment and communication mix choice	<ul style="list-style-type: none"> <li>• Choice of segment.</li> <li>• Selection of communications mix options.</li> <li>• Generating specific content (eg an email, blog or website page).</li> </ul>

**The methods of how the campaign will be measured**

The role of metrics in digital campaigns	<ul style="list-style-type: none"> <li>Objectives.</li> <li>Goals.</li> <li>KPIs.</li> </ul>
Tracking and collecting information in digital marketing	<ul style="list-style-type: none"> <li>Via Cookies (small text files on a device used to identify previous visitors to a website).</li> <li>Server-based tracking (using the log files generated by clicks on a website).</li> <li>Universal analytics – Google’s new service to allow individuals to be tracked rather than via browsers or devices.</li> </ul>
Metrics to measure the success of a campaign	<ul style="list-style-type: none"> <li>Hits.</li> <li>Page views.</li> <li>Visits.</li> <li>Visitors – new/returning.</li> <li>Navigation analytics.</li> <li>Stickiness – time spent on site.</li> <li>Reaction to content – bounces, conversion.</li> <li>Referrals.</li> <li>Customer feedback tools.</li> </ul>
Analysing data collected to modify the campaign	<ul style="list-style-type: none"> <li>Taking corrective action in response to variance from targets/goals for campaign.</li> <li>Observing customer behaviour patterns in response to the campaign.</li> <li>Segmentation – looking at how specific groups of users/customers behave in response to the campaign.</li> <li>Testing (eg A/B tests for different landing pages, concept testing and usability testing).</li> </ul>

**Performance outcomes**

On successful completion of this unit, learners will be able to:

Performance outcome 1:	Identify and define what is meant by digital marketing.
Performance outcome 2:	Determine the key factors that influence the digital consumer.
Performance outcome 3:	Identify and define the key digital marketing communications tools.
Performance outcome 4:	Understand how to develop digital marketing content.
Performance outcome 5:	Develop an outline digital marketing campaign.
Performance outcome 6:	Outline the methods of how the campaign will be measured.

## Grading criteria

Performance outcomes	Pass	Merit	Distinction
	To achieve a pass the learner must evidence that they can:	In addition to the pass criteria, to achieve a merit the evidence must show the learner can:	In addition to fulfilling the pass and merit criteria, to achieve a distinction the evidence must show that the learner can:
<b>PO1</b> <b>Identify and define what is meant by digital marketing</b>	<b>P1</b> Describe the <b>four</b> key characteristics of digital marketing.	<b>M1</b> Explore the differences and similarities between digital marketing and traditional marketing strategies.	<b>D1</b> Evaluate the role of each of the following and their impact on the implementation of a digital marketing campaign: <ul style="list-style-type: none"> <li>• crowd-sourcing</li> <li>• crowd-funding</li> <li>• micro-tasking.</li> </ul>
	<b>P2</b> <b>Research</b> how the internet has changed consumers' media consumption and habits.		
<b>PO2</b> <b>Determine the key factors that influence the digital consumer</b>	<b>P3</b> Explore the concerns and expectations of consumers about online transactions.	<b>M2</b> Compare the processes of online and off-line purchasing.	
	<b>P4</b> Explain how social networks and virtual communities influence the consumer.	<b>M3</b> Examine <b>four</b> techniques for researching online consumers.	
<b>PO3</b> <b>Identify and define the key digital marketing communications tools</b>	<b>P5</b> Outline the characteristics of the following digital communication tools: <ul style="list-style-type: none"> <li>• <b>five</b> content-based</li> <li>• <b>three</b> mobile.</li> </ul>	<b>M4</b> Compare and contrast two different options available for search-based digital marketing.	<b>D2</b> Evaluate how social networks are used by organisations for digital marketing communications.

Performance outcomes	Pass	Merit	Distinction
	<b>To achieve a pass the learner must evidence that they can:</b>	<b>In addition to the pass criteria, to achieve a merit the evidence must show the learner can:</b>	<b>In addition to fulfilling the pass and merit criteria, to achieve a distinction the evidence must show that the learner can:</b>
<b>PO4</b> <b>Understand how to develop digital marketing content</b>	<b>P6</b> Explain how the design of content attracts and influences an audience.		
	<b>P7</b> Outline the seven key steps for producing successful digital marketing content.	<b>M5</b> Assess how different forms of digital marketing content could be used.	
<b>PO5</b> <b>Develop an outline digital marketing campaign</b>	<b>P8</b> State the purpose and identify the objectives and marketing mix for a digital marketing campaign.		
	<b>P9</b> Select an appropriate tactical communications mix for a digital marketing campaign.	<b>M6</b> Develop the campaign content for a digital marketing campaign aimed at a specific market segment.	<b>D3</b> Justify your choices of digital marketing communications tools and specific market segments.
<b>PO6</b> <b>Outline the methods of how the campaign will be measured</b>	<b>P10</b> <b>Research</b> the role of metrics in digital campaigns.		
	<b>P11</b> Identify the KPIs for a digital marketing campaign		
	<b>P12</b> Suggest how the information will be tracked and collected.	<b>M7</b> Establish which metrics will be used to measure the success of a digital marketing campaign.	<b>D4</b> Evaluate how the data collected can be used to modify the campaign or influence future campaigns.

## Assessment amplification

**This section provides amplification of what is specifically required or exemplification of the responses learners are expected to provide.**

**Learners will be presented with an opportunity to demonstrate the transferable skill of research when completing either P2 or P10.**

This unit could be assessed as a single project, culminating in a digital marketing campaign against a client brief. This means that the evidence will be supported by a real research activity. Learners could present the campaign to the client, with supporting documentation, digital marketing communication materials, plans, KPIs and metrics to measure success.

For **P3** learners should be able to outline the perceived risks held by consumers in relation to online transactions, explaining whether the concerns are justified. Learners also need to be able to outline the basic expectations that consumers have when they purchase online, linked to information gathered from research.

For **M2** learners should demonstrate a basic knowledge of consumer decision-making models, supported by examples from real-life scenarios used to illustrate understanding.

For **M7** learners should demonstrate a practical and contemporary knowledge and understanding of digital marketing metrics through the recommendation of appropriate tools and measures.

For **D4** learners should demonstrate their knowledge of how data gathered via digital marketing metrics could be evaluated in order to provide information about the performance of the campaign. As data will not have been collected for the campaign, as the campaign would not be implemented, this knowledge of data evaluation should be generic. There also needs to be evidence of how findings derived from the evaluation of digital marketing data will influence the current, or future, campaign(s). Again, as the campaign has not actually been implemented, this evidence should be based on hypothetical situations such as positive or negative increases in key web metrics, or changes in engagement rates or sentiment on social media.

## Synoptic assessment

Whilst unit order is not prescribed, this unit is best delivered after the two examined units (ie Units 1 and 2) and alongside any of the following units: 3, 5, 6 and 7. There are opportunities for learners to demonstrate synoptic knowledge and learning from these other units in their evidence for this unit.

The following is a summary of the teaching and learning links that can be developed between Unit 4 Digital essentials and these other units:

### Unit 1 Competitive business environment

Learners understand the relationship between changing social trends and the way in which consumers use the internet and related media. In addition, learners understand the way in which the purpose of a specific digital marketing campaign is itself a part of those wider aims and objectives of the business as it plans its activities.

### Unit 2 Marketing principles

Learners understand how the changes in the external (macro) environment impact on consumers' habits regarding technology, and how the elements of the marketing mix are important for all elements of marketing planning and comprise a key part of a digital communications campaign.

### Unit 3 Customer communications

Learners understand the uses of social networks and virtual communities. They understand the different promotional elements and the factors surrounding their mix that are necessary for an effective digital communications campaign. They also understand the need for businesses to incorporate SMART objectives at all levels of their planning, both online and offline.

### Unit 5 Responsible business practices

Learners understand the concerns of customers regarding technology and digital purchasing. In addition, they also understand that businesses must take into account any concerns of customers and allow for this in their planning. The idea of business 'influence' is also explored.

### Unit 6 Marketing research

Learners understand the importance to business of the use of technology in assisting with the identification of consumers' needs. In addition learners understand the broader ethical/social concerns of consumers in respect of online activities.

### Unit 7 Stakeholder engagement

Learners understand the different digital communications tools that businesses can use for different stakeholder groups. They will also understand that these tools are chosen for the specific needs of different groups.

The amplification below identifies specific opportunities for synoptic teaching and learning. It also identifies where the centre should consider synoptic assessment.

Performance criteria	Link unit reference	Description of link
<b>P1</b> Describe the four key characteristics of digital marketing.	Unit 1: AO2 C Social and economic trends and their impact on the business organisation.	How changing social and economic trends have changed consumers' use of the internet and related media, and how this has impacted on business sales and costs.
	Unit 2: AO2 A Elements of the macro environment, ie PESTEL.	How changing trends in the macro environment have changed consumers' use of the internet and related media.
<b>P2</b> Research how the internet has changed consumers' media consumption and habits.	Unit 1: AO2 C Social and economic trends and their impact on the business organisation.	How changing social and economic trends have changed consumers' use of the internet and related media, and how this has impacted on business sales and costs.
	Unit 2: AO2 A Elements of the macro environment, ie PESTEL.	How changing trends in the macro environment have changed consumers' use of the internet and related media.



Performance criteria	Link unit reference	Description of link
<b>P3</b> Explore the concerns and expectations of consumers about online transactions.	Unit 5: PO2 P4 Ethical concerns.  Unit 5: PO2 P5 Social concerns.  Unit 6: PO5 P9 Questionnaire design and ethics and confidentiality issues in undertaking primary data collection.	How businesses need to take into account any ethical and social concerns of customers when expecting them to purchase online and complete online transactions, eg data protection and identity theft.  The breadth of consumers' concerns about business conducted online; ie consumers may also have broader concerns, eg about online research/surveys, as well as concerns about online transactions.
<b>P4</b> Explain how social networks and virtual communities influence the consumer.	Unit 3: PO4 P8 Online and social media marketing communications tools.  Unit 6: PO2 P3 Use and relevance of marketing research to different departments.  Unit 6: PO2 P5 Uses and benefits of a customer database.	How businesses use social networks and virtual communities in order to influence the consumer.  The importance to businesses of using technology to research customers' needs and the benefits that can be derived from this.
<b>P5</b> Outline the characteristics of the following digital communications tools: <ul style="list-style-type: none"> <li>• five content based</li> <li>• three mobile.</li> </ul>	Unit 7: PO5 P9 The importance of the message.  Unit 7: PO5 P10 Tools for external communication and their impact.  Unit 7: PO5 P11 Effective communications with external stakeholders.	How businesses communicate with key stakeholders using digital tools, and the importance of choosing tools which reflect the needs of the stakeholder group at the forefront of any communications.
<b>P6</b> Explain how the design of the content attracts and influences an audience.	Unit 5: PO5 P10 Influencers, eg political pressure, publicity.	How businesses need to both influence and take into account the views of 'influencers'. 'Influencing' can work two ways – the business influences the customer and the customer influences the business.

Performance criteria	Link unit reference	Description of link
<b>P8</b> State the purpose and identify the objectives and marketing mix for a digital marketing campaign.	Unit 1: AO1 B Business, vision, aims and objectives.	How business aims and objectives link with the specific aims and objectives of a digital marketing campaign, and how the business needs to set aims and objectives as part of its planning.
	Unit 3: PO5 P10 SMART objectives for a communications campaign.	How SMART objectives are relevant to all levels of business planning (including digital marketing campaigns).
<b>P9</b> Select an appropriate tactical communications mix for a digital marketing campaign.	Unit 2: AO4 A The 4Ps marketing mix.	The importance of the marketing mix and how the elements of the marketing mix, in particular, promotion, are used within the communications mix for a digital marketing campaign.
	Unit 2: AO4 B The extended marketing mix (7Ps).	
	Unit 5: PO2 P4 Ethical concerns.	How businesses need to be aware of key stakeholders' (customers') concerns and incorporate this into any planning that takes place for marketing campaigns.
	Unit 5: PO2 P5 Social concerns.	
	Unit 3: PO4 P7 The uses of advertising, sales promotion and PR within a marketing communications campaign.	How a variety of promotional communications are used and how they might be deployed in a communications mix suitable for a specific market segment.
	Unit 3: PO4 P8 Online and social media marketing communications tools.	

## Employer engagement guidance

Guest speakers could be invited to talk. These could be from the centre or from local organisations. Marketing departments and marketing agencies may have experience and knowledge to share with regards to digital marketing, such as promotions, search engine marketing, social media and analytics.

There are many professional bodies that could be consulted, or events attended, such as those from the CIM, IDM, DMI, MMA Globa.

## Delivery guidance

The overarching themes of this unit relate to key digital marketing tools and techniques used to develop, implement and measure a digital marketing campaign. Learners should be exposed to examples of different digital marketing campaigns, in different organisational contexts, in order to develop knowledge and understanding of how digital campaigns differ from more traditional marketing campaigns and how they work in practice. Research in to the impact and influence of technology, and especially the internet, on consumer behaviour in relation to digital media consumption, interactive communications, purchasing, security and social networks.

### Performance outcome 1

Learners should develop their knowledge and understanding of the key characteristics of digital marketing. There are a number of different topics for consideration here but they can all be considered via the presentation, discussion and comparison of a variety of different digital marketing campaigns. Key elements of digital marketing campaigns can be identified – such as the channels used, the interaction and dialogue with customers and the gathering of customer data. Customer data can then be linked to a research activity into how the internet has impacted on customer behaviour and the benefits it offers customers and consumers, as well as some of the issues it presents as well. The concept of the ‘crowd’ can be introduced with reference to specific websites and platforms, such as Wikipedia, Kickstarter and Mechanical Turk, in order to identify how the internet facilitates new types of global interaction and introduces new business models.

### Performance outcome 2

Learners should be introduced to the concept of the digital consumer. Learners can work in groups, or individually, in order to identify how the internet has impacted on their purchasing behaviour in relation to their expectations and concerns in relation to online transactions. The stages in a recent online purchase can be identified and developed as a flow chart and presented back to the group with a facilitated discussion of the different stages identified and whether there are distinct differences with offline purchases. Continuing with the same activity, the groups, or individuals, should then identify what influenced their purchasing and behaviour, with a specific focus on social networks and communities. These can then be discussed as a whole group with identification of similarities and differences in influence on a variety of different purchases. Finally, the key techniques that can be used to conduct research into online consumers can be introduced via real-life examples present on websites such as searchmetrics, similarweb, alexa and google analytics.

### Performance outcome 3

Learners should be asked to work in groups to identify as many different digital marketing tools that they can think of, and any examples of products, brands or organisations that use them. These can be produced as mind maps. Some key examples from these mind maps can then be accessed via the internet and shown to the class group. This can facilitate discussion as to whether these tools fall into content, search engine, mobile or social media marketing techniques. The strengths and weaknesses of the different tools and campaigns identified can be discussed with justification as to why the perceived strengths and weaknesses are present. If any relevant content, search, mobile or social media marketing examples are missed then these can be introduced in order to ensure all digital marketing communications tools are considered.

### Performance outcome 4

Learners should develop their understanding of what makes effective digital marketing content through the analysis of design and structure of digital marketing communications. These can be from a variety of online sources (website, social media, email, blog, online adverts, search engines) that the learners could gather themselves prior to a class or discussion. The examples can be presented back to facilitate discussion as to what it is that makes the content attractive and whether alternative approaches would have worked and, if so, what could they be? Learners should work in groups to produce digital marketing content for a given contemporary context (linked to a specific product, brand or organisation) working through the key states for producing digital content – understanding the customer, customer needs (information or entertainment), organisation expertise, media selection, develop new or curate existing content, plan updates, link to desired actions. When considering the stages of the different digital tools and media to use, along with the actual type of content provided, focus should be given as to how these will allow for customer interaction and participation.

## Performance outcome 5

Learners should be introduced to two key digital marketing models via discussion, and application to practice via real-life examples. These models are RACE (Chaffey and Smith, 2010) and the digital marketing communications mix. Understanding of these models in practice is vital before undertaking. Building on the activities undertaken for PO4, learners should identify an appropriate product, service or brand from a relevant organisation and use this to develop a digital marketing communications campaign. This is a substantial activity and may take longer than other activities for other performance outcomes, but it builds on the knowledge and understanding developed prior to this. Learners should be supported in choosing a relevant product, service or brand first, in order to ensure that it is relevant and realistic, before undertaking research into the market segment. There are many sources of data available for free online (Ofcom, YouGov, ONS, Comscore, MOSAIC, ACORN and Nielsen for example) where information about the target audience can be found in order to develop a simple profile of the target market segment for the campaign. Following this, learners can then develop a digital marketing campaign, following the stages introduced via PO4, and following the RACE framework. Relevant messages should be created, along with content, and linked to appropriate digital communications tools that will effectively deliver them to the market segment.

## Performance outcome 6

Learners should develop their knowledge of key metrics involved in measuring the performance of the digital marketing communications within a campaign. The goals, objectives and KPIs of campaigns can be discussed with consideration of the campaigns created in both PO4 and PO5, depending on which are appropriate and offer the potential to consider different metrics in context. Google Analytics, as a platform, should be introduced to the learners and the key metrics it offers be discussed. Finally, learners should take this knowledge of digital marketing communications metrics and, whilst working in groups, be presented with a number of hypothetical situations (eg the results of a decrease in traffic, an increase in bounce rate, a change in unique visitors, the number of conversions and similar) in order to determine how they would respond to these situations, what further testing and measurements they may need to undertake (eg real-time monitoring, A/B testing, online feedback) in order to take corrective action.

## Useful links and resources

- Ryan D and Jones C, *Understanding Digital Marketing: Marketing Strategies for Engaging the Digital Generation*, 2nd Edition, London, Kogan Page, ISBN-10: 0202309983 ISBN-13: 978-0749464271, (2012)
- Ryan D and Jones C, *The Best Digital Marketing Campaigns in the World: Mastering The Art of Customer Engagement*, London, Kogan Page, ISBN-10: 0749460628, ISBN-13: 978-0749460624, (2011).

The website 'SmartInsights' covers most of the unit's topics and provides free information [smartinsights.com/](http://smartinsights.com/)

The website 'Econsultancy' provides a variety of case studies, and topical insights, into contemporary digital marketing [econsultancy.com](http://econsultancy.com)

## Digital marketing

- [smartinsights.com/digital-marketing-strategy-guide/](http://smartinsights.com/digital-marketing-strategy-guide/)

## Crowd

- [dailycrowdsource.com/training/crowdsourcing/what-is-crowdsourcing](http://dailycrowdsource.com/training/crowdsourcing/what-is-crowdsourcing)
- [en.wikipedia.org/wiki/Main\\_Page](http://en.wikipedia.org/wiki/Main_Page)
- [kickstarter.com/](http://kickstarter.com/)
- [mturk.com/mturk/welcome](http://mturk.com/mturk/welcome)

## Digital behaviour

- [ons.gov.uk/ons/rel/rdit2/internet-access-quarterly-update/q1-2014/info-internet-usage.html](http://ons.gov.uk/ons/rel/rdit2/internet-access-quarterly-update/q1-2014/info-internet-usage.html)
- [stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr13/](http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr13/)
- [marketingweek.co.uk/trends/trending-topics/consumer-behaviour](http://marketingweek.co.uk/trends/trending-topics/consumer-behaviour)

## Online consumer research

- [similarweb.com/](http://similarweb.com/)
- [alexa.com/](http://alexa.com/)
- [suite.searchmetrics.com/en/research](http://suite.searchmetrics.com/en/research)
- [google.com/analytics/](http://google.com/analytics/)

## Marketing research

- [tutor2u.net/business/presentations/marketing/marketresearchintroduction/](http://tutor2u.net/business/presentations/marketing/marketresearchintroduction/)

## Purchasing behaviour

- [cim.co.uk/marketingplanningtool/tech/tech1.asp](http://cim.co.uk/marketingplanningtool/tech/tech1.asp)
- [thinkwithgoogle.com/collections/zero-moment-truth.html](http://thinkwithgoogle.com/collections/zero-moment-truth.html)

## Social media and communities

- [blog.kissmetrics.com/guide-to-facebook-insights/](http://blog.kissmetrics.com/guide-to-facebook-insights/)

## Digital marketing communications campaigns

- [thedrum.com/](http://thedrum.com/)
- [digitalbuzzblog.com/](http://digitalbuzzblog.com/)
- [econsultancy.com](http://econsultancy.com)

## Digital marketing communications

- [briansolis.com/2013/07/the-2013-social-media-landscape-infographic/](http://briansolis.com/2013/07/the-2013-social-media-landscape-infographic/)

## Search engine marketing

- [google.co.uk/intl/en/adwords/](http://google.co.uk/intl/en/adwords/)
- [searchengineland.com/guide/what-is-sem](http://searchengineland.com/guide/what-is-sem)

## Social media

- [blog.kissmetrics.com/guide-to-facebook-insights/](http://blog.kissmetrics.com/guide-to-facebook-insights/)
- [econsultancy.com/blog/63888-how-to-set-up-and-access-twitter-analytics#.i.13fhjg3z60croz](http://econsultancy.com/blog/63888-how-to-set-up-and-access-twitter-analytics#.i.13fhjg3z60croz)
- [socialmediaexaminer.com/new-research-shows-social-networks-ideal-marketers/](http://socialmediaexaminer.com/new-research-shows-social-networks-ideal-marketers/)

## Content marketing

- [contentmarketinginstitute.com/](http://contentmarketinginstitute.com/)
- [mashable.com/category/content-marketing/](http://mashable.com/category/content-marketing/)
- [i-scoop.eu/content-marketing/](http://i-scoop.eu/content-marketing/)

## Digital marketing and participation

- [smartinsights.com/customer-engagement/](http://smartinsights.com/customer-engagement/)
- [digitaltrainingacademy.com/casestudies/2013/07/social-media-case-study-burberry-encourages-customer-participation-with-art-of-trench.php](http://digitaltrainingacademy.com/casestudies/2013/07/social-media-case-study-burberry-encourages-customer-participation-with-art-of-trench.php)
- [marketingmagazine.co.uk/article/1282860/sxsw-2014-participation-will-underpin-everything-year](http://marketingmagazine.co.uk/article/1282860/sxsw-2014-participation-will-underpin-everything-year)

## Digital marketing campaign planning

- [smartinsights.com/traffic-building-strategy/campaign-planning/campaign-planning-template/](http://smartinsights.com/traffic-building-strategy/campaign-planning/campaign-planning-template/)
- [moz.com/blog/how-to-build-a-content-marketing-strategy](http://moz.com/blog/how-to-build-a-content-marketing-strategy)
- [socialmediatoday.com/mike-sweeney/1899161/how-build-effective-content-marketing-plan](http://socialmediatoday.com/mike-sweeney/1899161/how-build-effective-content-marketing-plan)

## KPIs

- [contentmarketinginstitute.com/2013/02/kpis-for-content-marketing-measurement/](http://contentmarketinginstitute.com/2013/02/kpis-for-content-marketing-measurement/)

## Digital marketing metrics

- [mashable.com/2012/07/27/marketing-metrics/](http://mashable.com/2012/07/27/marketing-metrics/)
- [marketo.com/webinars/the-definitive-guide-to-marketing-metrics-and-marketing-analytics-webinar/](http://marketo.com/webinars/the-definitive-guide-to-marketing-metrics-and-marketing-analytics-webinar/)
- [blog.hubspot.com/blog/tabid/6307/bid/24226/Top-10-Most-Commonly-Used-Internet-Marketing-Metrics-Data.aspx](http://blog.hubspot.com/blog/tabid/6307/bid/24226/Top-10-Most-Commonly-Used-Internet-Marketing-Metrics-Data.aspx)

## 12.5 Unit 5: Responsible business practices

<b>Title</b>	Responsible business practices
<b>Unit number</b>	M/507/6641
<b>Unit assessment type</b>	External assignment (AQA set and assessed assignment)
<b>Guided learning hours</b>	90
<b>Transferable skill(s) contextualised within this unit</b>	n/a
<b>Resources required for this unit</b>	<ul style="list-style-type: none"> <li>• Access to organisation-wide CSR policies.</li> <li>• Internet access.</li> </ul>
<b>Synoptic assessment and learning</b>	This unit is best delivered after the two examined units (ie Units 1 and 2) and alongside Units 3, 4, 6 and 7. There are opportunities for learners to demonstrate synoptic knowledge and learning from these other units in this unit.

### Aim and purpose

This unit aims to develop learners' ability to understand how legal, ethical and social concerns influence business activities. Learners will explore legislation and the consequences of non-compliance, with an emphasis on responsible business practice.

### Unit introduction

Society is changing. Business organisations do not operate in a vacuum; they need to find the most effective way to operate within the legal and social constraints set by the societies in which they operate. Learners will explore the legal, social and ethical constraints that influence business activities and debate the extent to which businesses should be constrained by these issues.

Learners will also develop their ability to both operate within such constraints and to document their compliance. Increasingly, organisations seek to define ways in which they operate in order to provide both guidelines for operators within the organisation and information for external stakeholders.

Organisation-wide corporate social responsibility (CSR) policies and procedures are an important way of recognising and promoting responsible business practices and managers are an important focal point for their implementation.

### Unit content

#### Legal issues influencing business activities

Legal requirements	<ul style="list-style-type: none"> <li>• NB specific technical knowledge of relevant legislation is not required – learners should be taught how legislation and regulations in the above areas affect business operations main legal requirements:             <ul style="list-style-type: none"> <li>• employment</li> <li>• health and safety</li> <li>• data protection and privacy</li> <li>• environment</li> <li>• corporate governance</li> <li>• consumer protection.</li> </ul> </li> </ul>
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### Legal issues influencing business activities

Impact of compliance and non-compliance	(eg) <ul style="list-style-type: none"> <li>• Operational performance.</li> <li>• Legal penalties.</li> <li>• Enforcement notices.</li> <li>• Remedial action.</li> <li>• Financial performance.</li> <li>• Reputation.</li> <li>• Possibility of enforced closure.</li> </ul>
Compliance documentation	(eg) <ul style="list-style-type: none"> <li>• Logs.</li> <li>• Observation records.</li> <li>• Inspection reports.</li> <li>• Keeping audit trail of activities.</li> <li>• Record keeping eg invoices, delivery notes.</li> </ul>
European and global considerations	<ul style="list-style-type: none"> <li>• EU legislation (eg):             <ul style="list-style-type: none"> <li>• consumer</li> <li>• environment/energy</li> <li>• health and safety.</li> </ul> </li> <li>• United Nations recommendations (eg):             <ul style="list-style-type: none"> <li>• human rights</li> <li>• labour</li> <li>• environment</li> <li>• anti-corruption.</li> </ul> </li> </ul>

### Social and ethical concerns influencing business activities

Stakeholders	(eg) <ul style="list-style-type: none"> <li>• Customers.</li> <li>• Suppliers.</li> <li>• Employees.</li> <li>• Investors.</li> <li>• Community.</li> </ul>
Ethical concerns	<ul style="list-style-type: none"> <li>• Ethics: the principles underpinning discussions of what is right and wrong in any given situation.</li> </ul> <p>Areas of ethical concern:</p> <ul style="list-style-type: none"> <li>• Sales and marketing (eg negative marketing campaigns, spamming).</li> <li>• HR (eg discrimination, minimum wage, cash in hand).</li> <li>• Production (eg products produced through exploitation).</li> <li>• Intellectual property (eg counterfeiting, file sharing, piracy).</li> <li>• Finance (eg bribery).</li> <li>• Corporate (eg tax avoidance).</li> </ul>



## Social and ethical concerns influencing business activities

Social concerns	<p>Social concerns eg:</p> <ul style="list-style-type: none"> <li>• Product safety.</li> <li>• Data security.</li> <li>• Environmental impact.</li> <li>• Quality of life.</li> <li>• Local community issues.</li> <li>• Production safety.</li> <li>• Sustainability.</li> <li>• Resource efficiency.</li> </ul>
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## Responsible practice

Responsible business practices	<p>(eg)</p> <ul style="list-style-type: none"> <li>• Extent to which actions go beyond compliance requirements.</li> <li>• Workplace practices eg working with employee groups.</li> <li>• Environmental practices eg carbon offsetting.</li> <li>• Community practices eg sponsorship, charitable and educational activities.</li> <li>• Customer relations eg rewards.</li> <li>• Supplier relations eg ethical outsourcing.</li> <li>• New staff induction.</li> </ul>
Managerial behaviour	<p>(eg)</p> <ul style="list-style-type: none"> <li>• Own day to day working practices.</li> <li>• Personal buy-in to corporate aspirations.</li> <li>• Allocating resources.</li> <li>• Directing the work of subordinates.</li> <li>• Communicating with others.</li> <li>• Resolving disputes.</li> </ul>
Corporate social responsibility	<ul style="list-style-type: none"> <li>• Social accountability.</li> <li>• Corporate philanthropy.</li> <li>• Respecting local cultural norms and values.</li> <li>• Organisational culture</li> <li>• Codes of conduct and behaviour.</li> <li>• Policies and guidelines.</li> </ul>
Promotion of CSR	<ul style="list-style-type: none"> <li>• Carroll's CSR pyramid.</li> <li>• Global Sullivan Principles.</li> </ul>

## Reviewing and making recommendations

Review	<ul style="list-style-type: none"> <li>• Determine the requirements.</li> <li>• Monitor business practices.</li> <li>• Identify areas of partial and non-compliance.</li> <li>• Determine the extent of compliance.</li> </ul>
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**Reviewing and making recommendations**

Recommendations	(eg) <ul style="list-style-type: none"> <li>• Remedial action.</li> <li>• Improved monitoring and enforcement.</li> <li>• New/revised policies and procedures.</li> <li>• Changes to resources used eg equipment.</li> <li>• Changes to working practices.</li> <li>• Training.</li> </ul>
Implications	<ul style="list-style-type: none"> <li>• Operational.</li> <li>• Employment eg job roles, training.</li> <li>• Publicity/corporate image.</li> <li>• Financial eg implementation costs, revenue; profitability.</li> <li>• Short term disruption.</li> <li>• Competitive position.</li> <li>• Supply chain relations.</li> <li>• Issues of timescales.</li> </ul>
Influencers	(eg) <ul style="list-style-type: none"> <li>• Political pressure eg pressure groups, political lobbying.</li> <li>• Publicity eg journalism, social media.</li> <li>• Consumer pressure eg boycotts.</li> <li>• Employee representation eg trades unions, works councils.</li> </ul>
Actions	(eg) <ul style="list-style-type: none"> <li>• Resources.</li> <li>• Working practices.</li> <li>• Training.</li> <li>• Monitoring.</li> <li>• Publicity.</li> <li>• Working agreements.</li> </ul>
Impending legislation	(eg) <ul style="list-style-type: none"> <li>• Employment.</li> <li>• Health and safety.</li> <li>• Transport.</li> <li>• Environment.</li> </ul>

**Performance outcomes**

On successful completion of this unit learners will be able to:

Performance outcome 1:	Understand how legal issues influence business activities.
Performance outcome 2:	Understand how social and ethical concerns influence business activities.
Performance outcome 3:	Understand responsible practice.
Performance outcome 4:	Understand how to review and make recommendations.
Performance outcome 5:	Understand how business should respond to changing pressures and impending legislation.

## Grading criteria

Performance outcomes	Pass	Merit	Distinction
	<b>To achieve a pass the learner must evidence that they can:</b>	<b>In addition to the pass criteria, to achieve a merit the evidence must show the learner can:</b>	<b>In addition to fulfilling the pass and merit criteria, to achieve a distinction the evidence must show that the learner can:</b>
<b>PO1</b> <b>Understand how legal issues influence business activities</b>	<b>P1</b> Describe the key characteristics of <b>each</b> of the main legal requirements that impact on the business, customers or employees.	<b>M1</b> Analyse the impact of non-compliance with legal requirements.	
	<b>P2</b> Identify which legislation(s) impacts on <b>three</b> different business areas for a selected organisation.	<b>M2</b> Document in detail how and why each legal requirement is compliant or non-compliant.	<b>D1</b> Recommend the actions the business should take in each case of non-compliance.
	<b>P3</b> Provide four examples of EU legislation or UN recommendations and explain how they impact on a selected business.		
<b>PO2</b> <b>Understand how social and ethical concerns influence business activities</b>	<b>P4</b> Describe current <b>ethical</b> concerns of the stakeholders which are relevant to a selected business.		
	<b>P5</b> Describe current <b>social</b> concerns of the stakeholders which are relevant to a selected business.		

Performance outcomes	Pass	Merit	Distinction
	<b>To achieve a pass the learner must evidence that they can:</b>	<b>In addition to the pass criteria, to achieve a merit the evidence must show the learner can:</b>	<b>In addition to fulfilling the pass and merit criteria, to achieve a distinction the evidence must show that the learner can:</b>
<b>PO3</b> <b>Understand responsible practice</b>	<b>P6</b> Describe four examples of responsible practice in a selected business.		
	<b>P7</b> Explain how a selected business complies with and promotes relevant CSR requirements.		
	<b>P8</b> Describe how <b>four</b> behaviours of a manager could reflect on specified corporate social responsibility (CSR) principles.		
<b>PO4</b> <b>Understand how to review and make recommendations</b>	<b>P9</b> Review the operation of a selected business and how it impacts on the immediate environment and the local community.	<b>M3</b> Recommend appropriate ways in which each impact could be improved.	<b>D2</b> Evaluate the implications for the selected organisation when implementing the recommendations.
<b>PO5</b> <b>Understand how business should respond to changing pressures and impending legislation</b>	<b>P10</b> Provide <b>four</b> different examples of the pressures on a selected business from influencers.	<b>M4</b> Recommend appropriate actions that could be taken in response.	<b>D3</b> Evaluate the consequences of a business not responding to pressure.
	<b>P11</b> Explore <b>two</b> areas of impending legislation on a selected business and identify the key points.	<b>M5</b> Explain the actions the selected business could take to prepare for the implementation of the legislation in each case.	

## Assessment amplification

This section provides amplification of what is specifically required or exemplification of the responses learners are expected to provide.

For **M1** learners should demonstrate an understanding of the consequences giving real examples of what could happen.

For **P2** learners will consider three business areas for a single organisation (eg sales, purchasing, production, HR, finance, distribution).

For **P7** learners could record the compliance of a selected business to CSR requirements explaining the characteristics of compliance, linking to the theory of how CSR is promoted for **M3**.

For **P8** learners should describe what happens when, for example, a manager does not share a corporate aspiration.

## External assessment model

This unit is assessed through an external assignment (ie AQA set and marked assignment). The assignment will take place under strictly controlled conditions (see Section 14) and the arrangements for availability of assignments and assessment windows will be published at the start of each academic year.

The external assignment will consist of a practical research task culminating in a written report for a specific audience, which learners will complete in approximately 20 hours. Learners will undertake the task in two distinct phases: firstly, 'preparation time', where learners conduct their research for the task, and, secondly, 'completion time', where learners write their reports in strictly controlled conditions.

Learners' reports will be assessed by AQA assessors using the performance criteria above. Learners must achieve each of the performance criteria associated with each grade to achieve that grade.

## Synoptic assessment

Whilst unit order is not prescribed, this unit is best delivered after the two examined units (ie Units 1 and 2) and alongside any of the following units: 3, 4, 6 and 7. There are opportunities for learners to demonstrate synoptic knowledge and learning from these other units in this unit.

The following is a summary of the teaching and learning links that can be developed between Unit 5 Responsible business practices and these other units.

### Unit 1 Competitive business environment

Learners understand how wider ethical, social and economic trends can impact upon the concerns of stakeholders of a business. Learners will understand how specific business reviews can be structured through the use of business planning tools ie SWOT analysis.

### Unit 2 Marketing principles

Learners understand the link between the macro and micro environment and stakeholders of a business. Learners should be able to identify the impact that the micro and macro environment have on stakeholders and any concerns that they might develop.

### Unit 3 Customer communications

Learners understand the role of customers as a key stakeholder for business and why businesses need to be aware of any social and ethical issues that concern customers in order to overcome them to maintain the customer relationship.

### Unit 4 Digital essentials

Learners understand the concerns of customers regarding technology and digital purchasing. In addition, they also understand that businesses must take into account any concerns of customers and allow for this in their planning. The idea of business 'influence' is also explored.

## Unit 6 Marketing research

Learners understand the importance of those legal, ethical and social requirements which underpin sound business activity.

## Unit 7 Stakeholder engagement

Learners understand the importance of being aware of different stakeholder concerns, and the impact that this can have on the business. Learners understand the role of pressure groups as a key external stakeholder of the business and how they can affect selected organisations.

The amplification below identifies specific opportunities for synoptic teaching and learning.

Performance criteria	Link unit reference	Description of link
<b>P1</b> Describe the key characteristics of each of the main legal requirements that impact on the business, customers or employees (and also <b>P2</b> and <b>P3</b> ).	Unit 6: PO5 P9 Questionnaire design and ethical and confidentiality issues in undertaking primary data collection.	The importance of businesses adhering to legal, ethical and social requirements when undertaking activities, and the impact that non-compliances can have on certain stakeholder groups.
<b>P4/P5</b> Describe current ethical/ social concerns of the stakeholders which are relevant to a selected business.	Unit 1: AO2 C Social and economic trends and their impact on the business organisation.	How broader trends within society influence the specific ethical and social concerns of key stakeholders.
	Unit 2: AO2 A Elements of the macro environment.	How the macro environment (ie PESTEL) influences the specific ethical and social concerns of key stakeholders.
	Unit 2: AO2 B Elements of the micro environment.	How the micro environment influences the specific concerns of key stakeholders.
	Unit 3: PO2 P3 Types of customer relationships and the nature of these relationships, eg loyalty, retention.	How the ethical and social concerns of stakeholders are a part of the wider business objective of building sound and sustainable relationships with business customers.
	Unit 6: PO5 P9 Questionnaire design and ethical and confidentiality issues in undertaking primary data collection.	The importance of businesses adhering to legal, ethical and social requirements when undertaking activities, and the impact that non-compliances can have on certain stakeholder groups.
	Unit 4: PO2 P3 The use of the internet and customers' expectations and concerns about online transactions.	How businesses need to take into account any ethical and social concerns of customers when expecting them to purchase online and complete online transactions, eg data protection and identity theft.

Performance criteria	Link unit reference	Description of link
	Unit 4: PO5 P9 Tactical communications mix; specific market segment.	How businesses need to be aware of key stakeholders' (customers') concerns and incorporate this into any planning that takes place for marketing campaigns.
	Unit 7: PO2 P3 The importance of stakeholders in an organisation's micro-environment.	The importance of being aware of stakeholders' ethical and social interactions with each other and their respective impacts on each other.
<b>P9</b> Review the operation of a selected business and how it impacts on the immediate environment and the local community.	Unit 1: AO4 A SWOT analysis.  Unit 1: AO4 E Responding to opportunities and threats.  Unit 7: PO2 P4 The impact of pressure groups as stakeholders.	How the organisation's review of its impact on its environment can be a function of a SWOT analysis, and how the terms of a SWOT analysis can be used to structure any review.  The role of pressure groups and the importance of businesses being aware of the role that pressure groups perform in impacting businesses and their operations.
<b>P10</b> Provide four different examples of the pressures on a selected business from influencers.	Unit 4: PO4 P6 Digital marketing content compared with traditional marketing content.  Unit 7: PO2 P4 The impact of pressure groups as stakeholders.	How businesses need to both influence and take into account the views of 'influencers'. 'Influencing' can work two ways – the business influences the customer and the customer influences the business.  The role of pressure groups and the importance of businesses being aware of the role that pressure groups perform in impacting businesses and their operations.

## Employer engagement guidance

Learners who are in appropriate working environments could be supported by the employer providing them with opportunities to become involved in managing compliance with legal and regulatory requirements. Employers could also offer learners the opportunity to learn how CSR is managed in workplace settings.

## Delivery guidance

### Performance outcome 1

Learners will need to be introduced to the main laws which affect business organisations. This is a potentially large area so there are opportunities for groups of learners to research specific areas and provide information to the rest of the class. Learners are not required to learn detailed technical aspects of individual laws, rather they should develop an understanding of what the legislation means for business organisations. They should consider UK issues as well as EU and UN recommendations for a more global perspective.

Having considered how these issues do and should apply in business organisations, learners should be taught the importance of demonstrating to both line managers and external stakeholders how these issues are complied with. The school or college would be a good place to start as learners are likely to be familiar with some external accountability requirements. They could research the policies and guidelines that apply and establish the legal requirements that they are designed to ensure compliance with. Learners could then practice developing guidelines and policies for specific requirements, eg developing codes of health and safety guidelines. Learners should then research how compliance can be demonstrated and how this may vary according to the specific context, for example compliance with food safety legislation may require inspections, record keeping (eg food storage temperatures) as well as guidelines and policies for staff. Learners should then practice operating and documenting compliance; for example when carrying out work using school or college computer equipment.

### Performance outcome 2

#### Definitions

**Ethical** – an issue that requires a decision from an individual or organisation, choosing between alternatives of right (ethical) and wrong (unethical) – for example, producing goods through exploitation or bribing companies to secure sales.

**Social concerns** – are moral issues that impact on society (or individuals) either directly or indirectly. These issues are less black and white and can often be the cause of significant debate – for example, the increase in the amount of data that is being held about us and the examples of data getting lost or stolen or the ‘not in my back yard’ position on the siting of released offender hostels.

Learners are likely to have wide-ranging knowledge of current matters of social concern but are unlikely to have considered them from a business perspective. At some point in early discussions about social issues comments may be made by some learners that “everything is just a matter of opinion” or “some things are just wrong”. These comments should serve as the basis for a deeper consideration of ethics and ethical questions, before the coverage is brought back to consider how these issues are applied in the business environment.

Learners should be taught to understand that these issues are by their very nature contestable. Some debate may ensue; in which case learners should be encouraged to return to the ethical principles which can help provide guidance as to how to behave in a business situation. Learners could then research in groups, different organisations and their responsible business practices to build up a library of examples.



### Performance outcome 3

Learners should be introduced to the concept of responsible business practice, discussing a range of issues such as organisations who only do the minimum to comply rather than those who invest and drive up standards of practice.

Learners should consider the internal practices and external practices of organisations, including working with the local community. Learners can explore the issues of rewarding customer loyalty, as well as how suppliers are selected.

This will lead to the next level of study in corporate social responsibility (CSR), where they will focus on issues of behaviour (including behaviour of managers and the importance of manager buy-in), culture, policies and guidelines.

Learners should learn about CSR by researching how organisations such as Nike document and communicate their CSR activities. Having considered how large corporations manage CSR, learners could consider how it might be introduced into a small to medium sized organisation.

An exploration of how CSR is promoted and linked to relevant theory completes the performance outcome.

### Performance outcome 4

Learners will need to understand the importance of reviewing continued business practice, the need to make recommendations and the implications of actions taken and not taken.

They should understand that ongoing review is necessary to maintain standards and should be able to explain a range of recommendations and show an understanding of timescales.

### Performance outcome 5

Learners should use recent examples of pressures on business brought by influencers. This could include local as well as national or global examples (eg Amazon and non-payment of corporation tax in the UK).

They could consider recent strike action by trades unions over pensions (fire service and teaching unions) and the impact that has on learning, or in the case of the fire service on public safety.

Learners could be given examples of proposed or new legislation and asked to consider the changes that its introduction would bring. Working in groups, they could investigate the actions that could be taken to prepare for such changes.

## External assignment delivery

The external assignment is best delivered from the point at which key topics have been well covered and the learner has a developing sense of the main themes of the unit.

We would expect the learner to spend about 20 hours researching, preparing to respond and responding to the report requirements. We would expect learners to take about 13 hours on preparation and about 7 hours on completion of the assignment task requirements. These are notional figures for guidance only, and tutors are free, where circumstances dictate, to allocate timings differently.

The different phases of the assignment should be broken down into regular weekly sessions, delivered continuously (ie week by week), and tutors should carefully read the *Guidance notes for tutors* before they deliver these sessions. The *Guidance notes for tutors* contain essential guidance for tutors and learners and must be read and communicated to learners prior to the commencement of work towards any aspect of the assignment.

## Useful links and resources

- Ethical Dilemmas: What would you do? Chartered Institute of Management Accountants (CiMA) located at [cimaglobal.com/Professional-ethics/Ethics/Responsible-business/Ethical-dilemma/](http://cimaglobal.com/Professional-ethics/Ethics/Responsible-business/Ethical-dilemma/) May 2014
- EU issue tracker – Regulatory Monitoring: [euissuetracker.com/en/Pages/default.aspx](http://euissuetracker.com/en/Pages/default.aspx)
- UN – International law: [un.org/en/law/](http://un.org/en/law/)
- United Nations Global Compact – Ten Principles: [unglobalcompact.org/AboutTheGC/TheTenPrinciples/index.html](http://unglobalcompact.org/AboutTheGC/TheTenPrinciples/index.html)
- The European Business Network for Corporate Social Responsibility: [csreurope.org/](http://csreurope.org/)
- The Guardian: [theguardian.com/environment/corporatesocialresponsibility](http://theguardian.com/environment/corporatesocialresponsibility)
- Crane A, Matten D and Spence L, *Corporate Social Responsibility: Readings and Cases in a Global Context*, ISBN-13: 978-0415683258, 2nd Edition, Routledge
- CSR previous award (see 2013) [csrawards.co.uk/](http://csrawards.co.uk/)
- Blowfield M and Murray A, *Corporate Responsibility*, ISBN-13: 978-0199581078, OUP Oxford
- Carroll Pyramid (original article reprint) [rohan.sdsu.edu/faculty/dunnweb/rprnts.pyramidofcsr.pdf](http://rohan.sdsu.edu/faculty/dunnweb/rprnts.pyramidofcsr.pdf)
- Global Sullivan Principles: [mallenbaker.net/csr/CSRfiles/gsprinciples.html](http://mallenbaker.net/csr/CSRfiles/gsprinciples.html)
- Corporate and Social Responsibility Strategy – Metropolitan Police: [met.police.uk/about/documents/csr\\_strategy.pdf](http://met.police.uk/about/documents/csr_strategy.pdf)
- McDonalds CSR Report 2012-13: [aboutmcdonalds.com/content/dam/AboutMcDonalds/2.0/pdfs/2012\\_2013\\_csr\\_report.pdf](http://aboutmcdonalds.com/content/dam/AboutMcDonalds/2.0/pdfs/2012_2013_csr_report.pdf)

Impending legislation could include:

- Health and Safety: [hse.gov.uk/legislation/forthcoming.htm](http://hse.gov.uk/legislation/forthcoming.htm)
- Employment: [cipd.co.uk/hr-resources/factsheets/employment-law-developments.aspx](http://cipd.co.uk/hr-resources/factsheets/employment-law-developments.aspx)
- Environment: [cips.org/Documents/Resources/Knowledge%20Now/Be%20Prepared\\_v2.pdf](http://cips.org/Documents/Resources/Knowledge%20Now/Be%20Prepared_v2.pdf)
- Transport: [transportlawupdates.com/](http://transportlawupdates.com/)

## 12.6 Unit 6: Marketing research

<b>Title</b>	Marketing research
<b>Unit number</b>	H/506/6088
<b>Unit assessment type</b>	Centre assessed and externally quality assured
<b>Recommended assessment method</b>	Practical assignment  This is the preferred assessment method for this unit. A centre may choose an alternative method of assessment, but will be asked to justify as part of the quality assurance process.
<b>Guided learning hours</b>	90
<b>Transferable skill(s) contextualised within this unit</b>	Communication (written) <sup>7</sup>
<b>Resources required for this unit</b>	<ul style="list-style-type: none"> <li>• Internet enabled computers.</li> <li>• Access to online survey software (eg Survey Monkey) or to spreadsheet software (eg Excel) for analysis of data.</li> <li>• Clipboards or tablets if required for face-to-face surveys.</li> </ul>
<b>Meaningful employer involvement</b>	It is a requirement that all learners undertake meaningful activity involving employers during their study and this activity will be scrutinised as part of our ongoing quality assurance activities with centres.
<b>Synoptic assessment and learning</b>	This unit is ideally delivered after the two examined units (ie Units 1 and 2) and alongside Units 3, 4, 5, and 7. There are opportunities for learners to demonstrate synoptic knowledge and learning from these other units in their evidence for this unit.

### Aim and purpose

This unit provides an understanding of marketing research and the roles and functions within this area of marketing. Learners will undertake market research and consider the different uses of information it provides.

### Unit introduction

This unit provides an overview of what marketing research is. It identifies different approaches to gathering marketing information and how to recognise suitable sources of information both inside and outside of the organisation. It introduces how to put marketing research into practice through the delivery of a primary marketing research activity.

This unit provides an opportunity to evidence achievement of the transferable skill of communication (written).

<sup>7</sup>Please visit the specification homepage to access the Transferable skills standards and associated guidance and recording documentation.

## Unit content

### The value of marketing research and information

Marketing research	<ul style="list-style-type: none"> <li>• What is marketing research?</li> <li>• Relevant data and information.</li> <li>• Using research to solve different types of marketing problems.</li> </ul>
Value and uses of marketing research	<ul style="list-style-type: none"> <li>• Using marketing research to create competitive advantage and differentiation.</li> <li>• Value and use in developing new products and services.</li> <li>• Using marketing research to track the effectiveness of campaigns and other marketing activities.</li> </ul>
Uses of marketing information systems	<ul style="list-style-type: none"> <li>• Define a 'marketing information system'.</li> <li>• Elements of a marketing information system.</li> <li>• Uses of marketing information systems.</li> </ul>

### Roles and functions in marketing research

Use and relevance of marketing research to different departments within the organisation	<ul style="list-style-type: none"> <li>• Use and relevance of research to the sales function, eg revenue/product volumes, customer feedback on the sales process, market share data.</li> <li>• Use and relevance of research to the product manager, eg product volumes, feedback from customers about products, competitor intelligence.</li> <li>• Use and relevance of research to the customer services team, customer feedback on service, benchmarking against competitors, tracking performance against customer service levels set.</li> <li>• Use and relevance of research to the marketing communications team, tracking effectiveness of marketing campaigns, brand recognition, positioning versus competition.</li> </ul>
Role and uses of external market research agencies	<ul style="list-style-type: none"> <li>• The purpose and types of external market research agencies.</li> <li>• The benefits of using external market research agencies.</li> <li>• Selecting an external marketing research agency.</li> <li>• Preparing a market research brief, eg company background, objective of the research, scope of the research, tendering process, timescales.</li> </ul>
Use of an external market research agency and an internal market research department	<ul style="list-style-type: none"> <li>• Comparing internal market research capacity and capability.</li> <li>• Factors for comparison:               <ul style="list-style-type: none"> <li>• costs</li> <li>• flexibility</li> <li>• knowledge/expertise (product/service and research methods)</li> <li>• innovation</li> <li>• confidentiality.</li> </ul> </li> </ul>

### Roles and functions in marketing research

Uses and benefits of a customer database	<ul style="list-style-type: none"> <li>• Customer database defined.</li> <li>• Uses of customer databases, eg direct marketing, sales support tool, relationship management, revenue generation.</li> <li>• Benefits of investing in a customer database, eg creating a 'single customer view', ease of communication, cross/up-selling, automatic capture of important data, ease of accessing and interrogation.</li> <li>• Challenges of developing and maintaining a customer database, implementation costs, ensuring it is used properly, keeping data up to date, ongoing support/investment costs, integration with other systems/databases.</li> </ul>
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### Sourcing marketing information, internally and externally

Internal sources of marketing information	<ul style="list-style-type: none"> <li>• Definition of an 'internal source' of marketing information.</li> <li>• Main sources explained (eg historic sales and customer data, complaints, product data, future forecasts, input from sales staff, new joiners, etc).</li> </ul>
External sources of marketing information	<ul style="list-style-type: none"> <li>• Definition of 'external sources' of marketing information.</li> <li>• Main sources explained (eg competitor intelligence, agencies, online sources, government and other official statistics, customer and other market research).</li> </ul>
Pros and cons of internal and external sources of marketing information	<ul style="list-style-type: none"> <li>• Benefits and drawbacks of internal sources.</li> <li>• Benefits and drawbacks of external sources.</li> <li>• Uses of each compared, eg costs, flexibility, reliability, confidentiality.</li> </ul>
Importance of competitor intelligence and how it is gathered	<ul style="list-style-type: none"> <li>• Brief description of competitive advantage and its importance.</li> <li>• Main sources of competitor intelligence (eg websites, online, reviewing competitor products, review competitor marketing activities, annual reports and accounts, feedback from sales force, new joiners).</li> </ul>

### The suitability of marketing research methods

Primary research	<ul style="list-style-type: none"> <li>• Define primary research.</li> <li>• Benefits and drawbacks of primary research.</li> <li>• Main uses of primary research data.</li> <li>• Outline the main methods of collecting primary data, eg surveys/questionnaires (online/email, face-to-face, telephone), in-depth interview, focus group, observation, customer panel, mystery shopping.</li> </ul>
Secondary research	<ul style="list-style-type: none"> <li>• Define secondary research.</li> <li>• Benefits and drawbacks of secondary research.</li> <li>• Main uses of secondary research data.</li> </ul>
Qualitative and quantitative research	<ul style="list-style-type: none"> <li>• Qualitative data defined.</li> <li>• Main uses of qualitative data.</li> <li>• Quantitative data defined.</li> <li>• Main uses of quantitative data.</li> <li>• Appropriate data collection methods, eg surveys/questionnaires for quantitative data; focus groups, observation, in-depth interviews for qualitative data.</li> </ul>

### The suitability of marketing research methods

Sampling techniques for marketing research	<ul style="list-style-type: none"> <li>• Define 'sampling'.</li> <li>• The importance of sampling.</li> <li>• Main sampling methods (eg random, stratified random, quota).</li> </ul>
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### Developing and undertaking a primary marketing research activity

Choosing the sample	<ul style="list-style-type: none"> <li>• Understanding the intended target market.</li> <li>• What is a 'representative' sample?</li> <li>• Main issues and considerations when choosing the sample.</li> </ul>
Choosing the data collection methods	<ul style="list-style-type: none"> <li>• Considerations for each of the main primary data collection methods, eg questionnaires and surveys (online, telephone and face-to-face), mystery shopping, focus groups, observation, customer panels, in-depth interviews.</li> </ul>
Questionnaire design	<ul style="list-style-type: none"> <li>• Consider the output required.</li> <li>• Designing questions.</li> <li>• Using different types of questions, eg closed questions, open questions, dichotomous questions, multiple-choice questions.</li> <li>• Use of scales, eg Likert Scale.</li> </ul>
Ethical and confidentiality issues in undertaking primary data collection	<ul style="list-style-type: none"> <li>• Communications with respondents.</li> <li>• Ethical practices in research.</li> <li>• The importance of ethics and confidentiality in market research.</li> </ul>

### Reporting and communicating findings of the primary marketing research activity

Data analysis and interpretation of research findings	<ul style="list-style-type: none"> <li>• The purpose of data analysis.</li> <li>• The meaning of interpretation.</li> <li>• Use of graphs and charts.</li> <li>• Identifying correlations.</li> </ul>
Reporting and communicating research findings	<ul style="list-style-type: none"> <li>• Different methods of reporting (ie written report versus presentation).</li> <li>• Structuring the report.</li> <li>• Consider the audience.</li> </ul>
Creating a summary of research findings	<ul style="list-style-type: none"> <li>• Focusing on the original research objectives.</li> <li>• Highlighting key findings.</li> <li>• Recommending actions to resolve problems.</li> </ul>
Potential risks and issues in drawing conclusions from marketing research	<ul style="list-style-type: none"> <li>• Sampling issues, eg incorrect sample, sample size too small, not representative of population.</li> <li>• Costs.</li> <li>• Time, eg the time taken to gather primary research, time taken to undertake analysis.</li> <li>• Relevance, eg secondary data must be relevant to the research objective, the sample selected is not relevant.</li> <li>• Bias, eg respondents influenced by researchers, 'leading' questions, personal bias of the researcher, personal bias of the person presenting the results.</li> </ul>

## Performance outcomes

On successful completion of this unit learners will be able to:

Performance outcome 1:	Identify the value of marketing research and information.
Performance outcome 2:	Understand roles and functions in marketing research.
Performance outcome 3:	Identify sources of marketing information from inside and outside the organisation.
Performance outcome 4:	Assess the suitability of marketing research methods.
Performance outcome 5:	Develop and undertake a primary marketing research activity.
Performance outcome 6:	Report and communicate findings of the primary marketing research activity.

## Grading criteria

Performance outcomes	Pass	Merit	Distinction
	<b>To achieve a pass the learner must evidence that they can:</b>	<b>In addition to the pass criteria, to achieve a merit the evidence must show the learner can:</b>	<b>In addition to fulfilling the pass and merit criteria, to achieve a distinction the evidence must show that the learner can:</b>
<b>PO1</b> <b>Identify the value of marketing research and information</b>	<b>P1</b> Explain marketing research and how research results are used.	<b>M1</b> Demonstrate the value of marketing research in <b>two</b> contexts giving examples.	
	<b>P2</b> Identify marketing information systems and describe how they are used.		

Performance outcomes	Pass	Merit	Distinction
	<b>To achieve a pass the learner must evidence that they can:</b>	<b>In addition to the pass criteria, to achieve a merit the evidence must show the learner can:</b>	<b>In addition to fulfilling the pass and merit criteria, to achieve a distinction the evidence must show that the learner can:</b>
<b>PO2</b> <b>Understand roles and functions in marketing research</b>	<b>P3</b> Investigate how marketing research can be used by three different areas of an organisation.		
	<b>P4</b> Describe the benefits of using external marketing research agencies identifying three services that they offer.	<b>M2</b> Compare and contrast an internal marketing department with an external marketing agency.	
	<b>P5</b> Explain <b>three</b> uses and their benefits of a customer database for marketing research purposes.		
<b>PO3</b> <b>Identify sources of marketing information from inside and outside the organisation</b>	<b>P6</b> Identify the main sources of internal and external marketing information providing <b>three</b> sources for each.	<b>M3</b> Discuss the benefits and drawbacks of internal and external sources of marketing information.	<b>D1</b> Evaluate the importance of competitor intelligence and discuss how it is gathered.
<b>PO4</b> <b>Assess the suitability of marketing research methods</b>	<b>P7</b> Illustrate the differences between primary and secondary research, providing four examples of when different methods might be appropriate.	<b>M4</b> Assess the uses of qualitative and quantitative research commenting on the reliability of the methods.	<b>D2</b> Justify the use of different sampling techniques to support qualitative and quantitative research.



Performance outcomes	Pass	Merit	Distinction
	<b>To achieve a pass the learner must evidence that they can:</b>	<b>In addition to the pass criteria, to achieve a merit the evidence must show the learner can:</b>	<b>In addition to fulfilling the pass and merit criteria, to achieve a distinction the evidence must show that the learner can:</b>
<b>PO5 Develop and undertake a primary marketing research activity</b>	<b>P8</b> Explain the importance of a 'representative' sample for use within a marketing research activity.	<b>M5</b> Justify <b>two</b> choices of data collection methods in relation to the sample selected for the marketing research activity.	
	<b>P9</b> Prepare a questionnaire for a marketing research activity ensuring consideration has been given to ethical and confidentiality issues.		
	<b>P10</b> Use the questionnaire to gather data.		
<b>PO6 Report and communicate findings of the primary marketing research activity</b>	<b>P11</b> Analyse the data gathered by the research activity.		
	<b>P12</b> Produce a <b>structured report</b> including <b>three</b> graphs and charts to communicate the results of marketing research to an audience.		
	<b>P13</b> Discuss <b>four</b> potential risks and issues of drawing conclusions from marketing research.	<b>M6</b> Identify risks from the data gathered for your research activity.	<b>D3</b> Suggest how these risks could be mitigated against.

## Assessment amplification

**This section provides amplification of what is specifically required or exemplification of the responses learners are expected to provide.**

**In completing P12, learners will be presented with an opportunity to demonstrate the transferable skill of communication (written).**

This unit could be assessed as a single project, culminating in a marketing research report against a client brief. This means that the evidence will be supported by a real research activity. Learners will put together their evidence in a formal report that could include all performance outcomes.

For **D2** the evidence from P7 and M4 is used by linking it together and justifying the use of primary or secondary research in the context of qualitative and quantitative research. It will be necessary to link to real examples. The assessment of the uses of qualitative and quantitative methods, and the justification of different sampling techniques, could be illustrative or academic.

For **D3** learners should draw clients' attention to the potential risks and issues in drawing conclusions from marketing research, for example time factors, bias, relevance.

## Synoptic assessment

Whilst unit order is not prescribed, this unit is best delivered after the two examined units (ie Units 1 and 2) and alongside any of the following units: 3, 4, 5, and 7. There are opportunities for learners to demonstrate synoptic knowledge and learning from these other units in their evidence for this unit.

The following is a summary of the teaching and learning links that can be developed between Unit 6 Marketing research and these other units.

### Unit 1 Competitive business environment

Learners understand the wider purpose of marketing research in the way the business uses findings to respond to threats and opportunities. They understand the breadth of data sources that potentially make up a marketing research exercise and the features of each source.

### Unit 2 Marketing principles

Learners understand the basic principles behind the way in which information is sourced and collected in the marketing environment.

### Unit 3 Customer communications

Learners understand the way in which the practical development of customer relationships can be aided and enhanced by the assistance of the external market research organisation and the benefits of a customer database.

### Unit 4 Digital essentials

Learners understand the importance to business of the use of technology in assisting with the identification of consumers' needs. In addition, learners understand the broader ethical/social concerns of consumers in respect of online activities.

### Unit 5 Responsible business practices

Learners understand the importance of those legal, ethical and social requirements which underpin sound business activity.

## Unit 7 Stakeholder engagement

Learners understand the ways in which relationship management is supported with the use of customer databases. Learners also understand the importance of vital customer relationships as key stakeholders for organisations.

The amplification below identifies specific opportunities for synoptic teaching and learning. It also identifies where the centre should consider synoptic assessment.

Performance criteria	Link unit reference	Description of link
<b>P1</b> Explain marketing research and how research results are used.	Unit 1: AO4 E Responding to opportunities and threats.	How businesses can respond to the conclusions that are drawn from marketing research and how they can plan to overcome any threats they may encounter and benefit from any opportunities.
<b>P3</b> Investigate how marketing research can be used by three different areas of an organisation.	Unit 4: PO2 P4 Social networks and virtual communities and how they influence the consumer; techniques for researching online consumers.	The importance to businesses of using technology to research customers' needs and the benefits that can be derived from this.
<b>P4</b> Describe the benefits of using external marketing research agencies identifying three other services that they offer.	Unit 3: PO2 P3 Customer relationships.  Unit 3: PO2 P4 Tools to manage and develop customer relationships.	How the purpose of an external market research organisation is to offer services to the business to aid their development and management of customer relationships.
<b>P5</b> Explain three uses and their benefits of a customer database for marketing research purposes.	Unit 3: PO2 P3 Customer relationships.  Unit 3: PO2 P4 Tools to manage and develop customer relationships.  Unit 4: PO2 P4 Social networks and virtual communities and how they influence the consumer; techniques for researching online consumers.  Unit 7: PO2 P3 The importance of stakeholders in an organisation's micro-environment.	The importance to business of using customer databases in order to target marketing more effectively, therefore, enabling a business to build, maintain and develop customer relationships more efficiently.  The importance to businesses of using technology to research customers' needs and the benefits that can be derived from this.  The importance of mutual relationships between organisations and how customer/stakeholder databases can help that relationship.

Performance criteria	Link unit reference	Description of link
<b>P7</b> Illustrate the differences between primary and secondary research providing four examples of when different methods might be appropriate.	Unit 1: AO2 B Economic data.  Unit 2: AO3 A, B, C Sources of data; methods used for quantitative and qualitative research.	The difference between primary and secondary research sources and the demands of using the type of data arising from each source.  How the activity of marketing research grows out of a broader consideration of how information is sourced and collected in the marketing environment.
<b>P8</b> Explain the importance of a 'representative' sample for use within a marketing research activity.	Unit 2: AO3 A Sources of data.	How the activity of marketing research grows out of a broader consideration of how information is sourced and collected in the marketing environment.
<b>P9</b> Prepare a questionnaire for a marketing research activity, ensuring consideration has been given to ethical and confidential issues.	Unit 2: AO3 A Sources of data.  Unit 5: PO1 P1/P2 Legal requirements.  Unit 5: PO1 P3 European and global considerations.  Unit 5: PO2 P4/5 Ethical/Social concerns.  Unit 4: PO2 P3 The use of the internet and customers' expectations and concerns about online transactions.	How the activity of marketing research grows out of a broader consideration of how information is sourced and collected in the marketing environment.  The importance of businesses adhering to legal, ethical and social requirements when undertaking business activities, and the impact that non-compliances can have on certain stakeholder groups.  The breadth of consumers' concerns about business conducted online; ie consumers may also have broader concerns for eg about online research/ surveys as well as concerns about online transactions.
<b>P10</b> Use the questionnaire to gather data.	Unit 2: AO3 A Sources of data.	How the activity of marketing research grows out of a broader consideration of how information is sourced and collected in the marketing environment.
<b>P11</b> Analyse the data gathered by the research activity.	Unit 1: AO2 B Economic data.	The difference between primary and secondary research sources and the demands of using the type of data arising from each source.

## Employer engagement guidance

Learners should be encouraged to gather examples of research and could contact local businesses to ask for sample questionnaires. Local market research agencies may also be willing to provide a guest speaker and give non-confidential information about the type of work that they are asked to do.

## Delivery guidance

The overarching themes of this unit are the uses of and benefits of marketing research. Learners need to understand the value to the organisation of having good quality information on the organisation's product/services, its customers and its markets. Such information is critical to making the right marketing decisions to achieve goals and ensure sustainable profitability. The unit has a practical element, giving learners the opportunity to put their knowledge into practice, designing a questionnaire and conducting a survey.

## Performance outcome 1

Learners are required to explain marketing research and its value to the organisation in achieving goals. They need to define marketing information systems (MkIS) and describe how they are used to support marketing.

A good starting point for this unit is for learners to discuss the ways in which they are surveyed as customers. For example, Amazon or Tripadvisor reviews, high street surveys and student panels or surveys. It is important that they understand the difference between someone telephoning or stopping people in the high street to capture data for sales, as compared with genuine research. The distinction between research and promotion needs to be clear.

Learners need to define marketing information systems (MkIS) and describe how they are used – providing a solid foundation for marketing decision making. From this basis, learners should recognise that simple decisions, eg 'which advertising method should be used?', are dependent on access to good information about customer profiles, past responses to campaigns, competitor activity, market conditions and media characteristics. The MkIS is the central (or virtual) point at which this information is managed.

## Performance outcome 2

Learners should investigate how marketing research is used by different departments in the organisation. They should be able to provide information about the services provided by market research agencies and compare the use of external agencies vs internal staff.

Good marketing research is of value to all organisations, from the micro-business to the large multi-national. Case studies and examples can be used to examine a wide range of research approaches to address a wide range of problems and opportunities. Sales: observe a café/retail outlet and count the footfall over a fixed period. Product: run a coke vs Pepsi taste test. Customer service: rate customer service for the Centre café. Marketing communications: test recall by looking at sample publications or websites for five minutes then listing the advertisements recalled.

The role of market research agencies can be investigated online, noting the services that top agencies offer, case studies and prices if available. A discussion around the choice of using in-house resources or using an agency can focus on issues such as cost, flexibility, expertise, innovation and confidentiality. Organisations sometimes have a hidden goldmine in terms of the data they already hold on customers; who they are, what they buy, how often they buy and any complaints or changes in usage levels.

Learners need to be able to recognise the value of the information they already have before commencing any research project. The importance of research should also shape the way that customer data is recorded, maintained and analysed.

### Performance outcome 3

Learners should define the main features of internal and external sources of marketing information and assess the value of that information to the organisation. They should understand how to gather competitor intelligence and evaluate the significance of the information gathered.

Scenarios can be used to enable learners to discuss and illustrate the depth and range of information available to marketing decision makers. The sources of internal data, starting with the customer database as covered in PO2, also include financial records, customer complaints, production records, call centre statistics etc.

The sources of external data will vary significantly from sector to sector but key sources would include government websites, trade magazines and industry reports. Learners can be tasked with searching online for information relevant to a specific business or sector.

An online search task can also be used to find out as much information as possible about the competitors of eg a college, a café, a music festival or a clothing brand – comparing company information, products, prices, availability, advertising and social media activity.

### Performance outcome 4

Learners need to be able to illustrate the differences between primary and secondary research and assess the uses of qualitative and quantitative research. They need to justify the use of different sampling techniques to support both qualitative and quantitative research.

Building on the information gathering undertaken in the delivery of PO3, learners should now develop their knowledge and explain the difference between primary and secondary research. Again, case studies and scenarios can be used in the context of particular challenges, such as a retailer investigating whether to open a new branch in a local town. Learners would further discuss the information that can be gathered through secondary research and the information that can be gathered through primary research to inform that decision.

The distinction between quantitative and qualitative can be demonstrated by getting learners to respond to eg a mock survey (quantitative) and then following this up with a mock focus group, discussing their opinions and impressions of the same product or service. They can then compare and contrast the resulting data and information.

Case studies and scenarios can be used to discuss the number of respondents that need to be in a sample, the composition of the sample and the sampling method used. These sampling approaches can be discussed and their impact on the quality of the results considered.

### Performance outcome 5

Learners should plan and conduct a research activity; defining the sample and preparing a questionnaire. They need to justify the data collection method selected and explain the ethical and confidentiality considerations in completing their primary research activity.

Learners can now put their knowledge into practice by agreeing with their tutors a topic and product/service for their primary research activity. Learners should choose a topic that is of interest to them, or it could be linked to projects and themes from other parts of their course. Some learners may have a work-related topic to research.

Suggestions could include:

- gathering information on the use of public transport
- measuring use of social media
- measuring awareness or use of favourite food products or fast food outlets
- measuring the likelihood of using a new product/service.

With a theme/topic in mind, the learners now need to identify and justify the sampling method they will use, ensuring that it is relevant to the theme/topic, as well as practical and achievable. The task is to produce a questionnaire and conduct the survey but learners can choose if they wish to undertake this as a self-fill, face-to-face, postal or online survey.

This choice should be informed by consideration of time, cost, practicality and suitability for the sample or the topic.

Ethical and confidentiality issues can be investigated through the Market Research Society codes of conduct but also a discussion around permissions; from research venues, businesses and the questionnaire respondents. At this point the learners will require time to conduct their surveys and gather data.

### Performance outcome 6

Having completed their survey, learners should now prepare and present the results using graphs and charts for interpretation. They should summarise the key findings and discuss the potential risks and issues of drawing conclusions from marketing research.

Having completed their survey, learners should now prepare and present the results. Statistical analysis can be completed manually, using Excel or through automated analysis using eg Survey Monkey (see below). Learners should understand that the final reporting method is flexible and can, for example, be a written report, a PowerPoint presentation or a video podcast. Ultimately, it needs to meet the needs of the audience. The audience needs to be defined and this can be on a hypothetical basis eg a presentation of results of the public transport survey to the local bus company. Whichever presentation method is proposed, it will be enhanced through the use of good graphics; graphs and charts showing the results clearly for the audience.

The final analysis is where learners can highlight the key points of their research – points that could be used to shape recommendations or influence marketing decisions. It also serves as a point of reflection where learners can consider if they have gathered enough information and have gathered it in the best possible way. Issues could include the risk of interviewer bias, the size and makeup of the sample, the relevance of the data to the topic/theme and the time taken and cost of gathering the data.



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## Useful links and resources

- Wilson A, *Marketing Research*, ISBN-10: 0273718703, ISBN-13: 978-0273718703, Prentice Hall, (2011)
- Bradley N, *Marketing Research*, OUP, Oxford, (2013)
- Market Research Society: [mrs.org.uk/](https://mrs.org.uk/)
- [research-live.com/](https://research-live.com/)
- [businesscasestudies.co.uk/business-theory/marketing/market-research.html#axzz33bOK8Fdi](https://businesscasestudies.co.uk/business-theory/marketing/market-research.html#axzz33bOK8Fdi)
- [cimmarketingexpert.co.uk/wp/?wpid=5022](https://cimmarketingexpert.co.uk/wp/?wpid=5022) (membership required).

## UK's top market research agencies

- [marketingdonut.co.uk](https://marketingdonut.co.uk)
- [palgrave.com](https://palgrave.com)
- [tutor2u.net/business/marketing/research-secondary.html](https://tutor2u.net/business/marketing/research-secondary.html)
- [marketingdonut.co.uk/marketing/market-research/questionnaires-surveys-and-focus-groups/top-20-questions-that-research-could-help-you-answer](https://marketingdonut.co.uk/marketing/market-research/questionnaires-surveys-and-focus-groups/top-20-questions-that-research-could-help-you-answer)
- [mrs.org.uk/standards/code\\_of\\_conduct/](https://mrs.org.uk/standards/code_of_conduct/)
- Free online survey software: [surveymonkey.com](https://surveymonkey.com)
- Free templates: [surveymonkey.com/mp/free-survey-templates/](https://surveymonkey.com/mp/free-survey-templates/)
- [quicksurveys.com](https://quicksurveys.com)
- [zoomerang.com](https://zoomerang.com)
- [slideshare.net/singhvivek6/14-tips-to-present-awesome-charts-2071447](https://slideshare.net/singhvivek6/14-tips-to-present-awesome-charts-2071447)



## 12.7 Unit 7: Stakeholder engagement

<b>Title</b>	Stakeholder engagement
<b>Unit number</b>	H/506/6091
<b>Unit assessment type</b>	Centre assessed and externally quality assured
<b>Recommended assessment method</b>	Practical assignment  This is the preferred assessment method for this unit. A centre may choose an alternative method of assessment, but will be asked to justify as part of the quality assurance process.
<b>Guided learning hours</b>	90
<b>Transferable skill(s) contextualised within this unit</b>	n/a
<b>Resources required for this unit</b>	<ul style="list-style-type: none"> <li>• Internet enabled computers.</li> <li>• Flipchart and pens.</li> <li>• Word-processing, spreadsheet and presentation software.</li> <li>• Note-taking software (eg Evernote, Google Keep, OneNote).</li> <li>• Mind-mapping software (eg Coggle, Freemind).</li> </ul>
<b>Meaningful employer involvement</b>	It is a requirement that all learners undertake meaningful activity involving employers during their study and this activity will be scrutinised as part of our ongoing quality assurance activities with centres.
<b>Synoptic assessment and learning</b>	This unit is ideally delivered after the two examined units (ie Units 1 and 2) and alongside Units 3, 4, 5, and 6. There are opportunities for learners to demonstrate synoptic knowledge and learning from these other units in their evidence for this unit.

### Aim and purpose

This unit provides an understanding of a range of organisational stakeholders beyond the customer. Learners will explore different stakeholders and develop appropriate communications for different types of stakeholder.

### Unit introduction

In this unit the key stakeholders are identified and the relationships with these stakeholders explored. This unit highlights the significance of developing and maintaining relationships with stakeholders and means of communicating with different stakeholders, both internal and external.

## Unit content

### Defining an organisation's stakeholders

Concept of a stakeholder	<ul style="list-style-type: none"> <li>Stakeholders as individuals or groups with some connection to the organisation.</li> <li>The need for marketing to understand relationships beyond the customer.</li> </ul>
Stakeholders of an organisation	<ul style="list-style-type: none"> <li>Freeman's generic stakeholder map:               <ul style="list-style-type: none"> <li>identifying all of the organisations stakeholders</li> <li>showing diagrammatically with the organisation at the centre and stakeholder groups radiating around it like the spokes of a wheel.</li> </ul> </li> </ul>
Types of stakeholder	<ul style="list-style-type: none"> <li>Internal stakeholders:               <ul style="list-style-type: none"> <li>employees</li> <li>managers</li> <li>directors.</li> </ul> </li> <li>Connected stakeholders:               <ul style="list-style-type: none"> <li>customers</li> <li>shareholders</li> <li>suppliers</li> <li>financiers</li> <li>competitors</li> <li>trade unions</li> <li>consultants/advisers.</li> </ul> </li> <li>External stakeholders:               <ul style="list-style-type: none"> <li>government</li> <li>pressure groups</li> <li>local community</li> <li>professional bodies</li> <li>media.</li> </ul> </li> </ul>
Stakeholders in different sectors	<ul style="list-style-type: none"> <li>Private sector organisations' stakeholders.</li> <li>Public sector organisations' stakeholders.</li> <li>Third (voluntary) sector organisations' stakeholders.</li> </ul>

### The importance of stakeholders to an organisation

The importance of stakeholders in an organisation's micro-environment	<ul style="list-style-type: none"> <li>Organisations do not operate in isolation.</li> <li>Other people and organisations also operate in the same environment.</li> <li>They all therefore have an impact on each other.</li> </ul>
The benefits that stakeholders can bring to an organisation	<p>(eg)</p> <ul style="list-style-type: none"> <li>Customers: main source of revenue, w-o-m recommendations; contributing new product ideas.</li> <li>Suppliers: reliable supply of raw materials; contributing new product ideas.</li> <li>Employees: carry out tasks needed by the organisation; can contribute ideas.</li> <li>Shareholders: provide capital.</li> </ul>

### The importance of stakeholders to an organisation

Potential threats that stakeholders can present to an organisation	<p>(eg)</p> <ul style="list-style-type: none"> <li>• Customers: defection to competitors; w-o-m complaints.</li> <li>• Suppliers: withdraw supply of raw materials; demand higher prices.</li> <li>• Employees: demand higher wages, threaten strike action.</li> <li>• Shareholders: demand higher dividends, withdraw capital.</li> </ul>
The impact of pressure groups as stakeholders	<ul style="list-style-type: none"> <li>• Define 'pressure group':               <ul style="list-style-type: none"> <li>• impact of pressure groups on (eg)</li> <li>• sustainability issues</li> <li>• welfare issues</li> <li>• other 'triple bottom line' issues.</li> </ul> </li> <li>• Pressure group influence on:               <ul style="list-style-type: none"> <li>• private sector organisations</li> <li>• public sector organisations</li> <li>• third (voluntary) sector organisations.</li> </ul> </li> </ul>

### The needs of different stakeholder groups

The power and influence stakeholders have on an organisation	<ul style="list-style-type: none"> <li>• Mendelow power/interest matrix.</li> <li>• Assessing the organisation's relationship with stakeholders:               <ul style="list-style-type: none"> <li>• high or low power over the organisation</li> <li>• high or low interest in the organisation.</li> </ul> </li> </ul>
The importance of different stakeholders	<ul style="list-style-type: none"> <li>• Recommended approaches based on Mendelow's matrix:               <ul style="list-style-type: none"> <li>• manage closely</li> <li>• keep satisfied</li> <li>• keep informed</li> <li>• monitor (minimum effort).</li> </ul> </li> <li>• Prioritising stakeholders relative to organisational objectives.</li> </ul>
The needs of different stakeholder groups	<ul style="list-style-type: none"> <li>• What different stakeholders look for:               <ul style="list-style-type: none"> <li>• shareholders – growth, dividends etc</li> <li>• employees – pay, job security, health and safety etc</li> <li>• customers – value for money, service, etc</li> <li>• suppliers – prompt payment, increased orders, etc</li> <li>• government – legal compliance, tax revenue, etc</li> <li>• special interest groups – furtherance of their special interest.</li> </ul> </li> </ul>
Areas of conflict between different stakeholders	<ul style="list-style-type: none"> <li>• Stakeholder conflict – for example:               <ul style="list-style-type: none"> <li>• customer vs organisation</li> <li>• employee vs organisation</li> <li>• pressure group vs organisation</li> <li>• internal employees vs shareholders.</li> </ul> </li> </ul>

**Developing and maintaining stakeholder relationships**

The importance of building stakeholder relationships	<ul style="list-style-type: none"> <li>• Ladder of loyalty.</li> <li>• Transactions vs relationships.</li> </ul>
Stakeholder relationships and how these can help achieve organisational objectives	<ul style="list-style-type: none"> <li>• Stakeholders can:               <ul style="list-style-type: none"> <li>• provide resources and capabilities</li> <li>• provide access to their networks</li> <li>• help spread your communication message.</li> </ul> </li> </ul>
Factors that influence stakeholder relationships	<ul style="list-style-type: none"> <li>• Trust/commitment/cooperation.</li> <li>• Importance of communication in building relationships.</li> <li>• Planned vs unplanned communication:               <ul style="list-style-type: none"> <li>• what the organisation says (its published communication)</li> <li>• what the organisation does (its actions and behaviour).</li> </ul> </li> </ul>
Process of communication	<ul style="list-style-type: none"> <li>• Sender – receiver.</li> <li>• Messages and signals.</li> <li>• Encoding/decoding.</li> <li>• Two-way communication process.</li> </ul>

**Communications for external stakeholders**

The importance of the message in the communication process	<ul style="list-style-type: none"> <li>• Importance of tailoring the message to the target audience.</li> <li>• Getting the encoding/decoding right.</li> </ul>
Tools for external communication	(eg) <ul style="list-style-type: none"> <li>• Advertising.</li> <li>• Public relations.</li> <li>• Personal selling.</li> <li>• Sales promotion.</li> <li>• Direct marketing.</li> </ul>
The impact of digital technology on external communication tools	<ul style="list-style-type: none"> <li>• Traditional vs digital advertising media.</li> <li>• Traditional vs digital public relations.</li> <li>• Traditional vs digital direct marketing.</li> </ul>
Effective communications with external stakeholders	<ul style="list-style-type: none"> <li>• Identifying the target audience.</li> <li>• Constructing the message.</li> <li>• Choosing the tools.</li> <li>• Choosing the media.</li> <li>• Measuring the results.</li> </ul>

### Communications for internal stakeholders

Key internal stakeholders in an organisation	<ul style="list-style-type: none"> <li>• Structure of organisation.</li> <li>• Where the power lies.</li> <li>• Levels of trust and agreement within the organisation (Block Matrix).</li> </ul>
Importance of communication in supporting internal relationships	<ul style="list-style-type: none"> <li>• Cross-functional relationships.</li> <li>• Corporate culture.</li> <li>• Customer focus.</li> </ul>
Tools for internal communication	(eg) <ul style="list-style-type: none"> <li>• e-mail.</li> <li>• Intranets.</li> <li>• Newsletters.</li> <li>• Conferencing.</li> <li>• Training.</li> <li>• One-to-one.</li> </ul>
Effective communications with internal stakeholders	<ul style="list-style-type: none"> <li>• Identifying the target audience.</li> <li>• Constructing the message.</li> <li>• Choosing the tools.</li> <li>• Choosing the media.</li> <li>• Measuring the results.</li> </ul>

### Performance outcomes

On successful completion of this unit, learners will be able to:

Performance outcome 1:	Identify and define an organisation's stakeholders.
Performance outcome 2:	Explain the importance of stakeholders to an organisation.
Performance outcome 3:	Understand the needs of different stakeholder groups.
Performance outcome 4:	Illustrate how stakeholder relationships can be developed and maintained.
Performance outcome 5:	Develop communications for external stakeholders.
Performance outcome 6:	Develop communications for internal stakeholders.

## Grading criteria

Performance outcomes	Pass	Merit	Distinction
	<b>To achieve a pass the learner must evidence that they can:</b>	<b>In addition to the pass criteria, to achieve a merit the evidence must show the learner can:</b>	<b>In addition to fulfilling the pass and merit criteria, to achieve a distinction the evidence must show that the learner can:</b>
<b>PO1</b> <b>Identify and define an organisation's stakeholders</b>	<b>P1</b> Explain what is meant by 'a stakeholder' and create a populated stakeholder map for a selected organisation.		
	<b>P2</b> Describe the <b>three</b> different types of stakeholders with three real examples of each.	<b>M1</b> Compare and contrast the stakeholders of the <b>three</b> different types of sectors.	
<b>PO2</b> <b>Explain the importance of stakeholders to an organisation</b>	<b>P3</b> Outline the importance of stakeholders within an organisation's micro-environment in the context of a selected organisation.	<b>M2</b> Consider <b>four</b> threats and <b>four</b> benefits that stakeholders can bring to a selected organisation, providing real examples.	<b>D1</b> Suggest how <b>each</b> of the threats could be mitigated or reduced.
	<b>P4</b> Identify <b>three</b> pressure groups who are influencing a real organisation.	<b>M3</b> Assess the impact of pressure groups on a selected organisation.	
<b>PO3</b> <b>Understand the needs of different stakeholder groups</b>	<b>P5</b> Explain the power and influence that stakeholders have on an organisation.	<b>M4</b> Assess the differences in the relationships depending on the perceived degree of power and interest.	<b>D2</b> Justify the importance of different stakeholders in relation to a selected organisation.
	<b>P6</b> Explain the differing needs of <b>four</b> of the stakeholders of a selected organisation.	<b>M5</b> Assess potential conflicts between <b>three</b> different pairs of stakeholders.	<b>D3</b> Suggest and summarise how <b>each</b> of these conflicts could be resolved.

Performance outcomes	Pass	Merit	Distinction
	<b>To achieve a pass the learner must evidence that they can:</b>	<b>In addition to the pass criteria, to achieve a merit the evidence must show the learner can:</b>	<b>In addition to fulfilling the pass and merit criteria, to achieve a distinction the evidence must show that the learner can:</b>
<b>PO4</b> <b>Illustrate how stakeholder relationships can be developed and maintained</b>	<b>P7</b> Research: <ul style="list-style-type: none"> <li>the ladder of loyalty</li> <li>transactions vs relationships</li> <li>and explain their importance in building stakeholder relationships.</li> </ul>	<b>M6</b> Explain how better relationships with stakeholders can help achieve organisational objectives, providing <b>three</b> examples.	<b>D4</b> Discuss how trust and communication (planned and unplanned) influences relationships.
	<b>P8</b> Describe the process of communication for developing and maintaining stakeholder relationships.		
<b>PO5</b> <b>Develop communications for external stakeholders</b>	<b>P9</b> Create a communication message that is tailored to meet the needs of a defined external stakeholder group.		
	<b>P10</b> Explain how <b>three</b> different digital technologies can be used and how they could impact on external communication tools.		
	<b>P11</b> Develop an external communications plan which includes <b>three</b> different communication tools.	<b>M7</b> Justify the selection of the tools used to relay the message to external stakeholders.	

Performance outcomes	Pass	Merit	Distinction
	<b>To achieve a pass the learner must evidence that they can:</b>	<b>In addition to the pass criteria, to achieve a merit the evidence must show the learner can:</b>	<b>In addition to fulfilling the pass and merit criteria, to achieve a distinction the evidence must show that the learner can:</b>
<b>PO6</b> <b>Develop communications for internal stakeholders</b>	<b>P12</b> Identify the <b>key</b> internal stakeholders for a selected organisation and research how communications can impact on them.		
	<b>P13</b> Develop an internal communications plan which includes <b>three</b> different communication tools.	<b>M8</b> Justify the selection of the tools to relay the message to internal stakeholders.	

## Assessment amplification

**This section provides amplification of what is specifically required or exemplification of the responses learners are expected to provide.**

This unit could be assessed as a single project, culminating in a briefing pack for a new sales team on how to promote stakeholder engagement. It could include evidence of research, stakeholder interview records, stakeholder maps, advice and guidance, exemplar communications for internal and external stakeholders. This could also be created as a website design with the evidence providing the proposed content for the site.

For **P1** the stakeholder map should be based on the Freeman model and it should be linked to an organisation of the learner's choice.

To achieve **M2** learners could produce a SWOT analysis.

To achieve **P5** learners should complete a populated Mendelow matrix for a chosen organisation in order to identify the power, influence and interest held by different stakeholders. They could talk through their matrix with their teacher or could provide the matrix with supporting notes.

To achieve **D2** learners should back up the justification of importance which could be captured through a viva.

To achieve **P8** learners should identify and describe the process of communications, drawn from the work of Schramm, 1954. Each stage of the process should be set out, using a relevant example where possible, in order to demonstrate knowledge of the process. An annotated and detailed diagram of the process flow will evidence this.



## Synoptic assessment

Whilst unit order is not prescribed, this unit is best delivered after the two examined units (ie Units 1 and 2) and alongside any of the following units: 3, 4, 5, and 6. There are opportunities for learners to demonstrate synoptic knowledge and learning from these other units in their evidence for this unit.

The following is a summary of the teaching and learning links that can be developed between Unit 7 Stakeholder engagement and these other units.

### Unit 1 Competitive business environment

Learners understand the link between stakeholders and the purpose of enterprising behaviour.

### Unit 2 Marketing principles

Learners understand the concept of the micro environment and the place of stakeholders within the micro-environment.

### Unit 3 Customer communications

Learners understand the need for businesses to retain customers and develop customer loyalty to benefit the business. Learners also understand the different methods that they are able to use in order to communicate with the external stakeholders of an organisation.

### Unit 4 Digital essentials

Learners understand the different digital communications tools that businesses can use for different stakeholder groups. They also understand that these tools are chosen for the specific needs of the differing groups.

### Unit 5 Responsible business practices

Learners understand the importance of being aware of different stakeholder concerns, and the impact that this can have on the business. Learners understand the role of pressure groups as a key external stakeholder of the business and how they can affect selected organisations.

### Unit 6 Marketing research

Learners understand the ways in which relationship management is supported with the use of customer databases. Learners also understand the importance of vital customer relationships as key stakeholders for organisations.

The amplification below identifies specific opportunities for synoptic teaching and learning. It also identifies where the centre should consider synoptic assessment.

Performance criteria	Link unit reference	Description of link
<b>P1</b> Explain what is meant by a stakeholder and create a populated map for a selected organisation.	Unit 1: AO1 A Enterprise and enterprising behaviour.	How knowledge of a business' stakeholders is a key part of the enterprising behaviour of effective businesses.
<b>P2</b> Describe the three types of different stakeholders with three real examples of each.	Unit 1: AO1 A Enterprise and enterprising behaviour.	How knowledge of a business' stakeholders is a key part of the enterprising behaviour of effective businesses.

Performance criteria	Link unit reference	Description of link
<b>P3</b> Outline the importance of stakeholders within an organisation's micro-environment in the context of a selected organisation.	Unit 2: AO2 B Elements of the micro environment.  Unit 5: PO2 P4 Ethical concerns.  Unit 5: PO2 P5 Social concerns.  Unit 6: PO2 P5 Uses and benefits of a customer database.	How stakeholders fit into the wider concept of the micro-environment and its importance to an organisation.  The importance of being aware of stakeholder's ethical and social interactions with each other and their respective impacts on each other.  The importance of mutual relationships between organisations and how customer/stakeholder databases can help that relationship.
<b>P4</b> Identify three pressure groups who are influencing a real organisation.	Unit 5: PO4 P9 Review and recommendations.  Unit 5: PO5 P10 Influencers.	The role of pressure groups and the importance of businesses being aware of the role that pressure groups perform in impacting businesses and their operations.
<b>P7</b> Research: The ladder of loyalty transactions vs relationships and explain their importance in building stakeholder relationships.	Unit 3: PO2 P3 Types of customer relationships and the nature of these relationships, eg loyalty ladder, retention.	The importance of an organisation's relationship with their customers as a key stakeholder, and the purpose of the ladder of loyalty for customer retention.
<b>P9</b> Create a communication message that is tailored to meet the needs of a defined external stakeholder group.	Unit 3: PO4 P7 The uses of advertising, sales promotion and PR within a marketing communications campaign.  Unit 4: PO3 P5 Content-based and mobile digital communications tools.	The different methods of communicating with external stakeholders and the importance of tailoring that message for the stakeholder group.  The need for businesses to communicate with key stakeholders using digital tools which should be chosen with the market segment and their needs at the forefront of the plan.
<b>P10</b> Explain how three digital technologies can be used and how they could impact on external communications tools.	Unit 4: PO3 P5 Content-based and mobile digital communications tools.	The need for businesses to communicate with key stakeholders using digital tools which should be chosen with the market segment and their needs at the forefront of the plan.
<b>P11</b> Develop an external communications plan which includes three different communication tools.	Unit 4: PO3 P5 Content-based and mobile digital communications tools.	The need for businesses to communicate with key stakeholders using digital tools which should be chosen with the market segment and their needs at the forefront of the plan.

## Employer engagement guidance

Guest speakers could be invited to talk. These could be from the centre or from local organisations. HR departments may have experience and knowledge to share with regards to internal stakeholders, relationships and communications. Marketers and buyers/procurement specialists may be able to share experience and knowledge with regards to external stakeholders, relationships and communications.

There are many professional bodies that could be consulted, or events attended, such as those from the CIM, CIPD, CIPS, CMI.

## Delivery guidance

The overarching themes of this unit are stakeholders, both internal and external, and how organisations can communicate effectively with them. This reinforces the concept that it is not just customers who have an interest in the activities of the organisation. Learners should be provided with examples of different stakeholder groups, in different organisational contexts, and the methods those organisations use to communicate with those stakeholders and how relationships are developed. Learners are required to make some clear recommendations in relation to how communications could be developed based on real life examples as well conducting basic stakeholder analysis using both Freeman's generic stakeholder map and the Mendelow matrix.

### Performance outcome 1

Here learners need to be able to understand what a stakeholder is, how they can be defined or classified and who the stakeholders are for their own organisation

Learners should become familiar with the concept of a stakeholder, who they are and what they do. There is a need to start to 'map' out who stakeholders are for real-life organisations and this can be achieved through the creation of a stakeholder map based on the work of Edward Freeman.

The chosen organisation can be placed at the centre of the 'map' and then key external and internal stakeholders connected to the organisation in the manner of a mind map. Mind mapping software or flipcharts and pens can be used. Following the creation of the stakeholder map, these can be compared and contrasted with the maps produced by other learners to look for similarities and differences across different organisations and sectors. If a particular sector (private, public and voluntary) is not covered in the stakeholder maps created, then they could be created as a group activity based on existing knowledge and research.

### Performance outcome 2

Learners should be able to determine the different types of relationships that exist with stakeholders and whether they present the organisation with opportunities or threats. Also of importance is a particular type of stakeholder group, the pressure group, and the impact, influence and interests they can have.

Learners should develop their understanding of who stakeholders are from the previous section and start to consider the importance of these stakeholders. Group discussions with learners can be facilitated to support them in identifying and discussing the potential benefits (revenue, word of mouth, ideas, materials, labour, finance) and threats (complaints, costs, strikes, withdrawal of investment) that different identified stakeholder groups have on their chosen organisations.

These can also be compared and contrasted across different sectors. When a pressure group is identified, spend time assessing the impact this pressure group can have on the organisation. Further consideration of pressure groups can be developed at the end of the discussion. This could be set as a research activity for learners to undertake independently, with a need to find real-life examples, for presentation in a future class or later in the session.

### Performance outcome 3

Learners are required to identify the interest and influence of different stakeholder groups through the application of the Mendelow matrix. Learners should be able to recommend different approaches to responding to differing stakeholder needs.

Learners should be provided with an example as to how to complete a Mendelow matrix – either a handout or a class discussion facilitated for a chosen organisation. Learners should then populate a Mendelow power/interest matrix in order to further categorise their identified stakeholders into one of the four categories proposed in the model. This could be done individually or in groups with one selected organisation. This work could be presented back to the rest of the class with a focus on explaining and justifying the decisions as to why each stakeholder has been classified as either a ‘key player’, ‘keep informed’, ‘keep satisfied’ or ‘minimal effort’.

The different needs of stakeholders in the four categories should then be considered to identify similarities and differences between the groups. Finally, conflict needs to be considered. This can be introduced as a concept with some generic examples. Learners can then use these examples to determine the extent of, or potential for, conflict for their own organisation, but internally and externally.

### Performance outcome 4

Learners are required to apply their knowledge of communications to stakeholder relationships and how they can be developed effectively in order to support the achievement of the organisation’s objectives.

Learners should be introduced to two key concepts within marketing and stakeholder engagement – the Ladder of loyalty and the nature of exchange between organisation and customer (transactional and relationship).

Time should be devoted to the explanation of these concepts using real-life examples to illustrate how they work in practice. Learners then need to consider these concepts in relation to their stakeholders and identify where there is potential to improve relationships in the future. A facilitated discussion around the concepts of trust, commitment and cooperation in relation to building effective working/stakeholder relationships can be used to develop understanding of the relevance and importance of these concepts in order to support the achievement of organisational objectives.

Finally, the process of communication can be described and built into a group activity to take an organisation message and consider how it is encoded and decoded and the potential for noise and its impact.

### Performance outcome 5

Learners are required to demonstrate their knowledge and understanding of communications through the application of an effective combination of marketing communications tools in order to meet external stakeholder needs.

Learners should consider different messages used in marketing communications that address different stakeholders. These can be from a variety of sources that the learners could gather themselves prior to a class or discussion. These messages can be presented back to facilitate discussion as to who the intended audience is, what the message is and what the desired outcome/action is. The message can also be assessed in relation to where it would be received and the process of communication (Schramm or Shannon and Weaver) applied.

Time should be spent identifying what type of communication tools and media can be used to deliver different types of messages to different stakeholders with specific focus on digital media. Learners should work in groups to develop a communications plan for specific external stakeholder groups, identifying their needs and then determining the message(s), tool(s), media and, finally, metrics.

This can be undertaken for a specific organisation with different groups assigned different external

stakeholder groups in order to compare and contrast the differences in approach across different stakeholders.

## Performance outcome 6

Learners are required to demonstrate their knowledge and understanding of communications through the application of an effective combination of marketing communications tools in order to meet internal stakeholder needs.

Learners should develop their understanding of who internal stakeholders within organisations are and how they can be communicated with. A consideration of organisational structures and power relationships should be undertaken as a facilitated group or class exercise where internal stakeholders are identified and categorised using a block matrix based on levels of trust and agreement.

Learners should be introduced to the different tools and media available for effective internal communications via collected examples and the importance and relevance of each example discussed – with a focus on questions such as why is it needed, who created it, what is its purpose, who is it for?

Finally, learners should work in groups to develop a communications plan for specific internal stakeholder groups, identifying their needs and then determining the message(s), tool(s), media and, finally, metrics. This can be undertaken for a specific organisation with different groups assigned different internal stakeholder groups in order to compare and contrast the differences in approach across different stakeholders.

## Useful links and resources

### General

The website 'MindTools' covers most of the unit's topics and provides free information: [mindtools.com/index.html](http://mindtools.com/index.html) as does 'BrainMates' [brainmates.com.au/brainrants/some-practical-tools-for-stakeholder-management](http://brainmates.com.au/brainrants/some-practical-tools-for-stakeholder-management)

As recommended in the tools section, mindmapping and note-taking software available via the Cloud are of use in this module to develop knowledge and understanding through the organisation and presentation of work and research.

### Stakeholder management

- [redwardfreeman.com/stakeholder-management/](http://redwardfreeman.com/stakeholder-management/)
- [mindtools.com/pages/article/newPPM\\_08.htm](http://mindtools.com/pages/article/newPPM_08.htm)

### Freeman's generic stakeholder map

- [professionalacademy.com/news/stakeholder-mapping-marketing-theories](http://professionalacademy.com/news/stakeholder-mapping-marketing-theories)

### Stakeholder engagement

- [theguardian.com/sustainable-business/stakeholder-engagement-practical-guide](http://theguardian.com/sustainable-business/stakeholder-engagement-practical-guide)
- [brunswickgroup.com//media/28885/Brunswick-Future-of-Stakeholder-Engagement-Report-Feb-2013.pdf](http://brunswickgroup.com//media/28885/Brunswick-Future-of-Stakeholder-Engagement-Report-Feb-2013.pdf)

### Importance of stakeholders

- [thecqi.org/Knowledge-Hub/Knowledge-portal/Customers-and-stake-holders/Stakeholders/](http://thecqi.org/Knowledge-Hub/Knowledge-portal/Customers-and-stake-holders/Stakeholders/)

## Pressure groups

- [en.wikipedia.org/wiki/List\\_of\\_pressure\\_groups\\_in\\_the\\_United\\_Kingdom](https://en.wikipedia.org/wiki/List_of_pressure_groups_in_the_United_Kingdom)
- [bbc.co.uk/bitesize/higher/modern/uk\\_gov\\_politics/central\\_gov/revision/4/](https://bbc.co.uk/bitesize/higher/modern/uk_gov_politics/central_gov/revision/4/)

## Stakeholder case study

- [businesscasestudies.co.uk/cadbury-schweppes/engaging-stakeholders-in-a-business/introduction.html#axzz33Tgtz1RK](https://businesscasestudies.co.uk/cadbury-schweppes/engaging-stakeholders-in-a-business/introduction.html#axzz33Tgtz1RK)

## Mendelow matrix

- [kfknowledgebank.kaplan.co.uk/KFKB/Wiki%20Pages/Mendelow's%20matrix.aspx](https://kfknowledgebank.kaplan.co.uk/KFKB/Wiki%20Pages/Mendelow's%20matrix.aspx)

## Stakeholder conflict

- [kfknowledgebank.kaplan.co.uk/KFKB/Wiki%20Pages/Stakeholder%20analysis.aspx](https://kfknowledgebank.kaplan.co.uk/KFKB/Wiki%20Pages/Stakeholder%20analysis.aspx)
- [brighthubpm.com/monitoring-projects/108843-sorting-through-stakeholder-conflicts/](https://brighthubpm.com/monitoring-projects/108843-sorting-through-stakeholder-conflicts/)

## Stakeholder case study

- [businesscasestudies.co.uk/reed-elsevier/corporate-responsibility-and-stakeholders/introduction.html#axzz33Tgtz1RK](https://businesscasestudies.co.uk/reed-elsevier/corporate-responsibility-and-stakeholders/introduction.html#axzz33Tgtz1RK)

## Ladder of loyalty

- [marketingteacher.com/the-loyalty-ladder/](https://marketingteacher.com/the-loyalty-ladder/)

## Transactional and relationship marketing

- [marsdd.com/mars-library/relationship-marketing-kotler-on-marketing/](https://marsdd.com/mars-library/relationship-marketing-kotler-on-marketing/)

## Building stakeholder relationships

- [ipsos.com/public-affairs/files/documents/understanding-stakeholders.pdf](https://ipsos.com/public-affairs/files/documents/understanding-stakeholders.pdf) (Public sector)

## Communications process

- [tutorialspoint.com/management\\_concepts/communication\\_models.htm](https://tutorialspoint.com/management_concepts/communication_models.htm)

## Marketing communications

- [cim.co.uk/files/marcomms.pdf](https://cim.co.uk/files/marcomms.pdf)

## Digital media

- [smartinsights.com/traffic-building-strategy/integrated-marketing-communications/](https://smartinsights.com/traffic-building-strategy/integrated-marketing-communications/)

## Communications plan

- [odi.org.uk/publications/5186-communications-strategy-planning](https://odi.org.uk/publications/5186-communications-strategy-planning)
- [nicva.org/sites/default/files/r\\_writgPR\\_06022003.pdf](https://nicva.org/sites/default/files/r_writgPR_06022003.pdf)
- [businesscasestudies.co.uk/kelloggs/devising-a-communications-plan/introduction.html#axzz33Tgtz1RK](https://businesscasestudies.co.uk/kelloggs/devising-a-communications-plan/introduction.html#axzz33Tgtz1RK)

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### Internal communications

- [snapcomms.com/markets/marketing-communications.aspx](https://snapcomms.com/markets/marketing-communications.aspx)

### Institute of internal communications knowledge bank

- [ioic.org.uk/ioic-knows/knowledge-bank/](https://ioic.org.uk/ioic-knows/knowledge-bank/)



## 12.8 Unit 8: Collaborative project

<b>Title</b>	Collaborative project
<b>Unit number</b>	M/506/6076
<b>Unit assessment type</b>	Centre assessed and externally quality assured
<b>Recommended assessment method</b>	Practical assignment  This is the preferred assessment method for this unit. A centre may choose an alternative method of assessment, but will be asked to justify as part of the quality assurance process.
<b>Guided learning hours</b>	90
<b>Transferable skill(s) contextualised within this unit</b>	Teamwork <sup>8</sup>
<b>Resources required for this unit</b>	<ul style="list-style-type: none"> <li>• Internet enabled computers.</li> <li>• Database, word processing and spreadsheet software.</li> <li>• Project management software eg Freedcamp.</li> <li>• Gantt software eg GanttProject.</li> </ul>
<b>Meaningful employer involvement</b>	It is a requirement that all learners undertake meaningful activity involving employers during their study and this activity will be scrutinised as part of our ongoing quality assurance activities with centres.
<b>Synoptic assessment and learning</b>	This unit is ideally delivered towards the end of the learning programme in order to facilitate the inclusion of content potentially from all/majority of other units. There are opportunities for learners to demonstrate synoptic knowledge and learning from these other units in their evidence for this unit.

### Aim and purpose

In this unit learners will investigate the steps required to successfully plan for, deliver and evaluate collaborative projects (such as a sponsored event for a charity, a promotional event for a business launch, an improvement to a business's stock control system, developing aspects of a business's performance appraisal procedures). They will explore the importance of team dynamics and cooperation, working within a team responsible for the delivery of a project.

This unit is synoptic as it will draw on the learning from most of the other units to solve the problem, and more time will need to be given to supervised practical activity.

### Unit introduction

People are the most important resource from any business and they need to be adaptable to work with different people in a range of different ways. Teamworking aims to make the best use of each individual's strengths so more can be achieved collaboratively. In order to become fully collaborative, teams need to go through stages of development. Distinct team roles and tasks need to be assigned in order to achieve objectives.

The unit will help learners to understand the factors that contribute to teamwork and be able to practice working in and reflecting on team situations. They will learn how to assess their own teamwork skills and that of other team members and be able to use and provide feedback to others.

This unit provides an opportunity to evidence achievement of the transferable skill of teamwork.

<sup>8</sup>Please visit the specification homepage to access the Transferable skills standards and associated guidance and recording documentation.



## Unit content

### Planning to work collaboratively on a project

Setting up teams working on collaborative projects

- Understanding the purpose of the project to be collaborated on (eg):
  - to promote a business or its products
  - raising target audience awareness of an issue
  - fund raising by a not-for-profit organisation
  - improving the efficiency of a stock control system
  - improving the effectiveness of a performance appraisal system.
- Defining key project stakeholders (eg):
  - sponsors of events
  - managers of business processes
  - individuals affect by the outcomes of the project.
- Defining the objectives of the team in order to establish success criteria (eg):
  - achieving deadlines
  - working collaboratively
  - receiving positive ratings from project stakeholders
  - making effective use of given resources.
- Understanding the activities necessary to successfully collaborate on a project (eg):
  - planning
  - organising
  - monitoring project tasks
  - reporting on the outcomes of the project.
- Researching the information required to collaborate on a project to include, as necessary:
  - health and safety issues
  - resource constraints relevant to the team.

## Planning to work collaboratively on a project

### Planning project team tasks

- Defining tasks that:
  - must be completed before (eg):
    - inviting delegates or arranging interviews with key stakeholders
  - during (eg):
    - ensuring materials/resources necessary for the project are available
    - carrying out interviews with key stakeholders)
  - after the project has been delivered (eg):
    - gathering feedback from stakeholders.
- Allocating tasks to members of the team in an equitable way, taking into account the skills of team members (eg):
  - communication
  - IT
  - problem solving
  - numeracy skills
 and the tasks to be performed in planning and delivering the project.
- Agreeing efficient methods of working between members of the team (eg):
  - lines of communication
  - times when team members need to collaborate.
- Considering how:
  - tasks have been allocated
  - the need to complete tasks and the project on time
  - the resources available to the team.

### Preparing to deliver collaborative projects

- The processes required to deliver a collaborative project (eg):
  - for inviting and confirming delegate attendance or gathering and storing stock flow data.
- Using systems to support the delivery of a collaborative project, to include organising, monitoring and evaluating the project (eg):
  - agreeing ways to communicate by email
  - using project management software such as Freedcamp
  - using Gantt charts to show the duration and planned completion of tasks
  - setting up a research database.
- Preparing resources to assist in the organisation of the collaborative project (eg):
  - invitation letters/emails
  - interview documents
  - materials checklists
  - creating a Gantt chart
  - creating a project in Freedcamp.
- Preparing resources to assist in the monitoring of the collaborative project (eg):
  - task checklists for individual team members
  - routines and methods for sharing information on progress
  - stakeholder feedback forms.

### Operating as an effective member of a project team

Working effectively within project teams	<ul style="list-style-type: none"> <li>• Following and promoting compliance with agreed health and safety rules during the delivery of the project.</li> <li>• Carrying out allocated tasks to a satisfactory standard and on time.</li> <li>• Fulfilling own responsibilities and obligations.</li> </ul>
Working cooperatively within project teams	<ul style="list-style-type: none"> <li>• Demonstrating an ability to work cooperatively within a project team, including the ability to:               <ul style="list-style-type: none"> <li>• communicate openly, honestly and at appropriate times</li> <li>• be flexible in own work and open to new ideas</li> <li>• recognise the skills and abilities of other team members.</li> </ul> </li> <li>• Seeking to defuse conflict within a project team by recognising the cause of conflict and helping to remove it and/or minimise its effects.</li> <li>• Cooperating with others to work towards agreed common goals.</li> <li>• Showing fairness and consideration to other project team members.</li> </ul>
Working collaboratively within project teams	<ul style="list-style-type: none"> <li>• Sharing own progress with other members of the project team (eg the extent to which allocated tasks have been completed and problems that have arisen).</li> <li>• Collaborating with project team members to identify ways in which team progress could be improved (eg by reallocating tasks or modifying their nature).</li> <li>• Discussing alternatives to previously agreed plans, when necessary.</li> <li>• Developing the ability of a project team to achieve its objectives (eg by reflecting on team dynamics and suggesting ways in which methods of working might be altered).</li> </ul>

### Evaluating the effectiveness of collaborative working as part of a project

Summarising feedback on the effectiveness of project teams	<ul style="list-style-type: none"> <li>• Collecting feedback, from project stakeholders, on the project outcomes (eg by using feedback forms, team member observations, stakeholder observations).</li> <li>• Using feedback to focus on the performance of the project team, including:               <ul style="list-style-type: none"> <li>• stakeholder comments on the delivery of the project</li> <li>• average ratings taken from feedback forms</li> <li>• team member observations regarding the performance of the project team (eg was conflict minimised?).</li> </ul> </li> <li>• Identifying key project team successes and failures (eg did meet deadlines but conflict within team made delivering the project quite stressful).</li> </ul>
Improving own ability to work with others within project teams	<ul style="list-style-type: none"> <li>• Using evidence to reflect on own ability to work with others, including 360 reviews and performance during the delivery of the project.</li> <li>• The areas in which own performance could be improved, considering which aspects of cooperative working are evidently less developed.</li> <li>• The ways in which own performance could be improved, eg by specifying ways in which behaviour could have been adapted, using examples from planning and delivering the project.</li> </ul>

### Evaluating the effectiveness of collaborative working as part of a project

Evaluating the performance of project teams

- Understanding the factors influencing the success of project teams, to include a consideration of:
  - team dynamics
  - systems used to support delivery of the project
  - the nature of the project.
- Understanding how the level of teamworking skills, held by team members, influences the success of a project team, including:
  - communication skills
  - organisational skills
  - interpersonal skills.
- How the performance of project teams could be improved, taking into account teamworking skills and the factors influencing the success of the team.

### Performance outcomes

On successful completion of this unit learners will be able to:

Performance outcome 1:	Plan to work collaboratively on a project.
Performance outcome 2:	Operate as an effective member of a project team.
Performance outcome 3:	Evaluate the effectiveness of collaborative working as part of a project.

## Grading criteria

Performance outcomes	Pass	Merit	Distinction
	<b>To achieve a pass the learner must evidence that they can:</b>	<b>In addition to the pass criteria, to achieve a merit the evidence must show the learner can:</b>	<b>In addition to fulfilling the pass and merit criteria, to achieve a distinction the evidence must show that the learner can:</b>
<b>PO1</b> <b>Plan to work collaboratively on a project</b>	<b>P1</b> Outline a project plan by defining: <ul style="list-style-type: none"> <li>the purpose of the project</li> <li>key project stakeholders</li> <li>objectives of the team to evidence success</li> <li>set up activities and identify research required to begin the project.</li> </ul>		
	<b>P2</b> Carry out necessary research to support project and provide <b>three</b> sets of findings.		
	<b>P3</b> Agree and record the project tasks and allocate to members of the project team.	<b>M1</b> Justify the roles and responsibilities of each project team member.	
	<b>P4</b> Outline five processes that will be used to assist in the delivery of the project.	<b>M2</b> Explain how the processes will be effective in assisting teamworking to support a project.	<b>D1</b> Justify the choice of processes that will be used to support the project.
	<b>P5</b> Prepare monitoring resources that will be needed to support the delivery of the project.		

Performance outcomes	Pass	Merit	Distinction
	<b>To achieve a pass the learner must evidence that they can:</b>	<b>In addition to the pass criteria, to achieve a merit the evidence must show the learner can:</b>	<b>In addition to fulfilling the pass and merit criteria, to achieve a distinction the evidence must show that the learner can:</b>
<b>PO2</b> <b>Operate as an effective member of a project team</b>	<b>P6</b> Demonstrate the ability to work effectively as a member of the project team.		
	<b>P7</b> Demonstrate the ability to work cooperatively within the project team providing three different examples.	<b>M3</b> Explore <b>two</b> ways to improve the ability of the project team to work cooperatively.	
	<b>P8</b> Provide evidence of <b>three</b> occasions where own progress has been shared, agreeing actions and updating own plan as necessary.	<b>M4</b> Consider changes to other project team members' tasks to improve the team performance.	<b>D2</b> Justify these changes and their impact on the project.
<b>PO3</b> <b>Evaluate the effectiveness of collaborative working as part of a project</b>	<b>P9</b> Collect and collate feedback from other team members and stakeholders on the effectiveness of the team individuals delivering the project.		
	<b>P10</b> Summarise feedback from stakeholders on the effectiveness of the project team.		
	<b>P11</b> Evaluate own performance when working with others.		
	<b>P12</b> Illustrate <b>four</b> factors influencing the success of the project team.	<b>M5</b> Analyse factors influencing the performance of the project team.	<b>D3</b> Evaluate the performance of the project team in delivering the collaborative project.

## Assessment amplification

This section provides amplification of what is specifically required or exemplification of the responses learners are expected to provide.

**In completing this unit, the process of teamworking will be continually developed and reflected upon.**

Whilst learners should be operating within a team, the assignments produced by centres will be highly contextualised to their own business links (possibly not-for-profit) and the opportunities available for learners to work collaboratively on a project. However, the following features would be demonstrated by an effective assignment:

- It is based on a project that is likely to be implemented by a real business (profit or not-for-profit) in a local setting.
- It provides a context that 16 to 19 year old learners could engage with, eg fund raising events such as sponsored sport activity for a charity; a business promotion such as an event designed to launch a new business; the staff appraisal system used within the learners' centre; stock control within a small scale business.
- The project team should consist of at least three members.

Evidence could include personal logs, reflective logs, project logs, team plans and monitoring documents, feedback sheets, diagrams and charts, checklists, interview records or recordings, witness statements from teachers, minutes of meetings, emails, development notes. Learners could also make use of software such as Microsoft Project (if available) or Freedcamp (free software). The output of the project will also provide evidence.

Whilst team evidence is important and needs to be accessible to all learners, it is also important that learners ensure they are able to satisfy individually the requirements of the unit. The learner should use personal/reflective logs to achieve this, and where they have contributed to a team task, they should identify clearly the nature of their specific contribution.

For **P2** learners should provide evidence of research by providing information (eg health and safety considerations and how these should be managed, or how some project constraints could be overcome). This evidence should be presented in the form of team research findings, detailing how team members researched each finding. It is important that team research findings are accessible to all members of the team so that each learner can use the findings to provide their own individual evidence.

For **M1** the reasons for allocation of the tasks should make reference to specific skills and strengths of particular team members.

For **D1** learners should also show that they have considered processes that were subsequently disregarded and should explain why this was the case.

For **P6** evidence will rely on responses from peer and witness statements.

For **P7** learners should provide validated evidence of at least three occasions when they demonstrated **different** aspects of their ability to work cooperatively.

For **P8** minutes of meetings could be particularly useful.

For **P9** evidence will rely on responses from peer statements.

For **P10** interviews and questionnaires could be used to gather information from stakeholders where appropriate.

For **M5** and **D3** evidence should focus on the strengths and weaknesses of teams and individuals and collaborative working.

## Synoptic assessment

Whilst unit order is not prescribed, this unit is best delivered towards the end of the learner's programme of study in order to facilitate the inclusion of content potentially from all other units. There are opportunities for learners to demonstrate synoptic knowledge and learning from these other units in their evidence for this unit.

The following grid provides a contextualised example of the way in which teaching and learning links can be developed between Unit 8 Collaborative project and all other units. This suggested amplification identifies specific opportunities for synoptic teaching and learning. It identifies where the centre should consider synoptic assessment. Another more detailed example is included in Appendix B.

## Project idea example

### Fundraising event held within college.

Possible ideas: football tournament, battle of the bands, total wipeout, etc.

Project description	Performance outcomes and criteria from other units
<p>Learners would be asked to identify a charity that is supported by the school/college. They would then be required to plan out an event and complete all marketing activities associated with the event taking place. This event would raise money for the associated charity and also involve a large group of teachers/learners within the school where possible. Learners would be required to keep a log of all activities they participate in.</p> <p>Learners would set up and work in a team to plan the success of the event. They would need to work collaboratively to ensure the successful delivery of the event.</p> <p>Learners would need to work within a team in order to be able to summarise their own abilities and that of the other team members. Ultimately, they would evaluate the performance of the team in making the fundraiser a success.</p>	<p><b>Unit 1: Competitive business environment</b></p> <p><b>AO1 B</b> Apply knowledge and understanding of business vision, aims and objectives to business contexts and analyse the suitability and/or achievement of these. <b>Learners would need to set aims and objectives for their fundraising campaign.</b></p> <p><b>AO2 A</b> Apply knowledge and understanding of UK and international economic data to business contexts. <b>Learners should be aware of the economic situation during the fundraising campaign and to take this into account for any prices charged for participation.</b></p> <p><b>Unit 2: Marketing principles</b></p> <p><b>AO4 A</b> The 4ps marketing mix</p> <p><b>AO4 B</b> The extended marketing mix (7ps)</p> <p><b>AO4 D</b> The marketing mix and how it is used to meet customers' needs and wants. <b>Learners would need to be aware of the marketing mix, both 4ps and the extended mix in order to market their fundraising idea. Through understanding and using this marketing mix effectively learners would therefore be able to meet the customer's needs and wants.</b></p> <p><b>Unit 3: Customer communications</b></p> <p><b>PO4</b> Understand different marketing communications tools. <b>Learners will need to identify the different communication tools that can be used for the campaign, and for their target market for the fundraiser.</b></p>



Project description	Performance outcomes and criteria from other units
	<p><b>PO5</b> Develop a marketing communications campaign. <b>Learners will need to plan and work in a collaborative team to develop and appropriate marketing communications campaign for the fundraiser.</b></p> <p><b>PO6</b> Illustrate how the marketing communications campaign will be put into practice. <b>Learners will then be required to put this communications plan into practice and to be able to schedule resources and ensure the success of the marketing campaign.</b></p> <p><b>Unit 4: Digital essentials</b></p> <p><b>PO5</b> Develop an outline digital marketing campaign. <b>Learners could use the social media sites and digital channels used by their college/ school to market their campaign – this is especially useful as social media is extremely popular with this age group.</b></p> <p><b>Unit 5: Responsible business practices</b></p> <p><b>PO1</b> Understand how legal issues influence business activities. <b>Learners would need to be able to take into account any legal requirements for the fundraiser during the planning process.</b></p> <p><b>PO2</b> Understand how social and ethical concerns influence business activities. <b>Learners would need to take into account any social and ethical concerns that their target market has throughout the fundraiser planning process.</b></p> <p><b>Unit 6: Marketing research</b></p> <p><b>PO5</b> Develop and undertake a primary marketing research activity. <b>Learners will need to undertake market research in order to find out the needs of their target market and what they think will raise the most money.</b></p> <p><b>PO6</b> Report and communicate findings of the primary market research activity. <b>Learners will need to be aware of the outcomes of the market research activity, and therefore reporting on the findings will be beneficial for the fundraiser.</b></p>

Project description	Performance outcomes and criteria from other units
	<b>Unit 7: Stakeholder engagement</b> <b>PO5</b> Develop communications for external stakeholders. <b>PO6</b> Develop communications for internal stakeholders. <b>Learners will need to take into account how to communicate with the various stakeholder groups, both internal and external – this should be accounted for in their planning.</b>

## Employer engagement guidance

Local business links could provide the context for the project to be collaborated on. This would provide a realistic context and also assist in the provision of resources for the project, eg it could be a project which the employer has delivered in the past which could then be used as a context for learners. Employers could actively contribute to the delivery and assessment of the unit, especially in relation to the meaning of working with others and the assessment of individual and team performance.

## Delivery guidance

### Performance outcome 1

Learners are required to describe the objectives and activities of their project team. They should consider the information needs of the team and its working methods, considering the goal for the team to function effectively and efficiently. Learners should investigate ways in which the project will be coordinated. They should consider how this coordination might be carried out and produce materials (paper or IT based) to support this.

Learners should be introduced to the idea of collaborative projects by considering the various activities that come under the heading. Web based research should serve to illustrate the variety of projects that can be collaborated on. At this stage, the context for the project to be managed by learners could be discussed. Time should be given for learners to develop an awareness of the activities involved in the project and how these vary according to the type of project being managed. However, the fundamental issue of managing resources should be seen as central to all project activities. At this stage, the information required to deliver two or three examples of projects could be investigated. Learners could discuss the importance of the information and possible sources for it. This would probably be a good time for tasks to be defined for the project. Time should then be given to investigating how these tasks could be allocated to individual team members. If a log book system is being used to help record evidence for assessment, this would also be a good time to introduce the importance and purposes of the log book.

Learners could then be introduced to the importance of agreeing working methods within a team, ie lines of communication, how tasks can be shared and quality checked. Examples of teamworking could be used from the institution's department, from learners' experience of part-time work and from wider sources, such as sports teams. At this stage it may be possible for the project team to discuss and agree efficient methods of working. It will probably also be sensible to provide an overview of the content of PO2 so that learners are aware of what is ahead of them. They should also be reminded of the importance of their log books.

Learners should then consider the importance of establishing set procedures to complete the project tasks. Again, these could be illustrated with reference to the examples of projects introduced earlier on. It would also probably be a good idea to review the software available to learners and how it could help them to organise the procedures into systems. An example of an events database could be used to illustrate this. Checklists of resources needed to deliver a project could be issued and discussed.

At this stage, the project team should be given time to develop systems and resources for their own collaborative project.

Learners should be given the time to implement their systems and ready themselves for delivering their project. In addition, it would probably be sensible for learners to review their log books, or other evidence, in order to identify existing evidence for PO1. At this stage, and as a transition to PO2, evidence of working with others could also be mapped and updated.

## Performance outcome 2

Learners are required to implement the plans and working methods considered in PO1. They should carry out their allocated tasks considering the requirements of their team role. Learners should work cooperatively with other team members, taking into account the need to minimise conflict within the team. They should monitor their own progress, and the progress of other team members, in order to share information and develop the ability of the team to achieve the objectives identified in PO1.

If possible, learners should be given some practical experience of project delivery prior to 'going live'. Links with local businesses would prove valuable here, eg learners could observe an event and, if possible, have follow up discussions with the event managers. This experience could be used by the learners to revisit their existing plans and resources before delivering the project. Health and safety aspects should be thoroughly covered and learners should amend their plans accordingly. The assessment requirements of PO2 should be thoroughly reviewed and the PO2 content delivered. A range of role plays could be utilised to illustrate some of the key concepts. However, as they have been working in their team for some time, the idea of cooperative and collaborative working should be apparent. At this stage, learners could be given an opportunity to review the 'health' of their team and complete their log books as necessary.

After delivering the project, assessors may well want to review the evidence built up by learners and the witness statements completed for each learner. This process, in itself, should be a learning stage for individuals and would be a good time to celebrate the delivery of the project.

## Performance outcome 3

Learners are required to collect and analyse feedback, from project stakeholders, on the effectiveness of their team. They should reflect on their own individual performance, exploring the ways in which they might improve their ability to work with others. Learners should consider the factors which have influenced the success of their team, evaluating the key factors and recommending ways in which performance of the team could have been improved.

Each main subsection of PO3 should be delivered to ensure that learners are fully aware of the ways in which they will evaluate the effectiveness of their team. If local businesses have been involved in supporting the unit, this would also be a good time for representatives to provide team and, perhaps, individual feedback to learners.

Learners should then be given time to gather and analyse evidence about their individual performance and that of the project team. This could be a potentially stressful and confusing stage and centres may want to provide some structure and security for learners. This in itself could provide opportunities for learners to reflect on their own ability to work with others. It is likely that centres will need to develop learners' understanding of team dynamics and teamworking skills so that they are in a position to sensibly reflect on their performance.

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## Useful links and resources

### Planning project team tasks

- [mindtools.com/pages/article/newPPM\\_63.htm](http://mindtools.com/pages/article/newPPM_63.htm)
- [wikihow.com/Manage-an-Event](http://wikihow.com/Manage-an-Event)
- [eventmanagerblog.com/](http://eventmanagerblog.com/)

### Preparing to deliver collaborative projects

- [smartsheet.com/blog/project-manage-event-planning#.U3obCvldV8F](http://smartsheet.com/blog/project-manage-event-planning#.U3obCvldV8F)
- [freedcamp.com](http://freedcamp.com)
- [ganttproject.biz/](http://ganttproject.biz/)
- [youtube.com/watch?v=5rHCSa5ad34](http://youtube.com/watch?v=5rHCSa5ad34)

### Working effectively within project teams

- [mindtools.com/pages/article/newTMM\\_53.htm](http://mindtools.com/pages/article/newTMM_53.htm)

### Working cooperatively within project teams

- [mindtools.com/CommSkill/CommunicationIntro.htm](http://mindtools.com/CommSkill/CommunicationIntro.htm)
- [mindtools.com/pages/article/newTMM\\_36.htm](http://mindtools.com/pages/article/newTMM_36.htm)

### Working collaboratively within project teams

- [mindtools.com/pages/article/newLDR\\_86.htm](http://mindtools.com/pages/article/newLDR_86.htm)
- [mindtools.com/pages/article/improving-group-dynamics.htm](http://mindtools.com/pages/article/improving-group-dynamics.htm)
- [mindtools.com/pages/article/newLDR\\_64.htm](http://mindtools.com/pages/article/newLDR_64.htm)
- [mindtools.com/pages/article/newTMM\\_84.htm](http://mindtools.com/pages/article/newTMM_84.htm)
- [skillsyouneed.com/general/communication-skills.html](http://skillsyouneed.com/general/communication-skills.html)
- [wikihow.com/Develop-Interpersonal-Skills](http://wikihow.com/Develop-Interpersonal-Skills)
- [wikihow.com/Category:Time-Management-%26-Personal-Organization](http://wikihow.com/Category:Time-Management-%26-Personal-Organization)

# 13 Externally set and marked examinations

## 13.1 Introduction

Unit K/506/6075 Competitive business environment and Unit Y/506/6086 Marketing principles of the Level 3 Foundation Technical Level Business: Marketing Communications and the Level 3 Technical Level Business: Marketing are assessed via an externally set and marked AQA examination.

External examinations are set by AQA (sometimes in collaboration with an employer or a professional body) and are sat by learners in a controlled examination environment, at a pre-set time and date and marked by AQA.

Examinations are available for externally assessed units in January and June and entries must be made in accordance with AQA's procedures.

Further information on how to make entries for examinations can be found in the *AQA Centre Administration Guide for Technical and Vocational Qualifications*.

## 13.2 Examination format and structure

Unit title	K/506/6075 – Competitive business environment
Exam sessions	January and June
Duration	2 hours
Type of exam	Written exam A mixture of multiple choice, short answer and case study type questions.
Number of marks	80
Weighting of unit	25% of the Level 3 Foundation Technical Level Business: Marketing Communications qualification, TVQ01021 (360 GLH) 12.5% of the Level 3 Technical Level Business: Marketing qualification, TVQ01020 (720 GLH)

Unit title	Y/506/6086 – Marketing principles
Exam sessions	January and June
Duration	2 hours
Type of exam	Written exam  A mixture of multiple choice, short answer and case study type questions.
Number of marks	80
Weighting of unit	25% of the Level 3 Foundation Technical Level Business: Marketing Communications qualification, TVQ01021 (360 GLH)  12.5% of the Level 3 Technical Level Business: Marketing qualification, TVQ01020 (720 GLH)

### 13.3 Reasonable adjustments and special considerations

Information on the reasonable adjustments allowed for the external examinations within these qualifications can be found in the *AQA Centre Administration Guide for Technical and Vocational Qualifications*.

### 13.4 Availability of past examination papers

Sample and past examination papers for this qualification are available from AQA.

# 14 Externally set and marked assignments

Unit M/507/6641 Responsible business practices of the Level 3 Technical Level Business: Marketing qualification is assessed via an externally set and marked AQA assignment.

External assignments are set by AQA (sometimes in collaboration with an employer or a professional body), and are sat by learners in a supervised environment and marked by AQA.

Further information on how to make entries for external assignments can be found in the *AQA Centre Administration Guide for Technical and Vocational Qualifications* at [aqa.org.uk](http://aqa.org.uk)

## 14.1 Assignment format and structure

There are two assignments for Unit M/507/6641 Responsible business practices in each academic year.

Materials for the assignment are released to centres on a specified date each year. This date can be obtained from the AQA website [aqa.org.uk](http://aqa.org.uk)

There are two windows for assessment each year when centres must submit their learners' completed external assignments to AQA for marking. The dates of these windows can be obtained from the AQA website.

Learners must undertake their external assignment tasks individually and under supervised conditions. The *Guidance notes for tutors* and the *Assignment brief* provide specific instructions on the way in which the assignment tasks should be delivered.

## 14.2 Preparation

The assignment should only be undertaken after learners have acquired the necessary skills and after teaching for the appropriate sections of the specification has taken place. Learners should also be familiar with any apparatus, equipment or materials they will need to use.

Centres should organise an appropriate approach to the delivery of the assignment that takes into account when the assignment becomes available and when completed learner work is required by AQA for submission.

Before starting the assignment, centres should introduce learners to the *Information for candidates* document that identifies the rules surrounding learner research and independent working. Learners should be introduced to the idea that prior to submission of their external assignment they will be required to sign a declaration to say that they have complied fully with the rules of the administration of the external assignment.

## 14.3 Risk assessment and risk management

Risk assessment and risk management are the responsibility of the centre.

## 14.4 Carrying out the assessment

Learners are expected to work individually.

Unless specific guidance to the contrary is made in the assignment brief, centres should not give any advice to learners regarding completing the assignment.

Details of any supporting documents, materials or electronic devices that can be used by learners during the assessment will be provided within the *Guidance notes for tutors* and the *Assignment brief*. The circumstances in which learners are permitted to undertake research will also be specified within the *Guidance notes for tutors* and the *Assignment brief*.

## 14.5 Learner absence

If a learner is absent for a part of the assignment then they should be given the opportunity to undertake the part of the assignment missed before they move on to the next stage. This may be with another group or at a different time.

## 14.6 Storage of materials

Materials for each assignment must be kept unopened and in secure storage until the date upon which the centre wishes to commence work on the assignment with learners.

Secure storage is defined as a securely locked cabinet or cupboard.

Whilst undertaking assignment tasks, at the end of each session, the centre must collect the learners' work and keep it securely until the next session. Learners must not take any assessment materials away at the end of a session. Specific rules relating to the security of assessment can be found in the *Guidance notes for tutors*.

Further guidance on secure storage can be found in the *JCQ Instructions for Conducting Examinations* document at [jcq.org.uk/exams-office/ice---instructions-for-conducting-examinations](http://jcq.org.uk/exams-office/ice---instructions-for-conducting-examinations)

Where learners' work is in an electronic format, centres must take steps to ensure that they meet the requirements for secure storage described above. This may involve collecting USB memory sticks for secure storage between sessions or restricting learners' access to specific areas of the centre's IT network.

As a general rule, learners should use the IT facilities provided by their centre. Where learners wish to/are required to use their own equipment, then the centre is responsible for establishing and implementing a procedure to ensure compliance with the requirements for secure storage described above.

## 14.7 Submission of learner work

Deadlines for submission of assignments will be provided on the AQA website [aqa.org.uk](http://aqa.org.uk)

Details of submission arrangements can be found in the *AQA Centre Administration Guide for Technical and Vocational Qualifications* at [aqa.org.uk](http://aqa.org.uk)

To ensure that the external assignment has been completed appropriately, learners and tutors are required to confirm before all learner work is sent to AQA for marking that each of the learners has undertaken the assessment appropriately and in accordance with the rules.



## 14.8 Redrafting or resubmission of learner work

Learners may only make one attempt at each assignment and redrafting is not allowed at any stage. Learners who wish to re-sit a unit assessment must attempt a different assignment.

## 14.9 Suspected malpractice or maladministration

Where centres suspect that the work produced by the learner is not their own, then this could potentially be malpractice. Further guidance on dealing with malpractice can be found in the JCQ document *Suspected Malpractice in Examinations and Assessments: Policies and Procedures* – [jcq.org.uk/exams-office/malpractice](http://jcq.org.uk/exams-office/malpractice) and in the AQA Centre Administration Guide for Technical and Vocational Qualifications at [aqa.org.uk](http://aqa.org.uk)

# 15 External quality assurance

## 15.1 Overview

AQA's approach to quality assurance for these qualifications is described within each unit specification.

External quality assurance for Tech-levels takes the form of verification and is concerned with maintaining the quality of assessment and checking that the assessment process has been undertaken appropriately by centre staff. It focuses on auditing the whole process and enables the head of centre, and all individuals involved in the assessment process, to understand what is required by them.

## 15.2 Quality assurance visits

When a learner is registered or a centre wants to submit work, this triggers a verification visit from an AQA external quality assurer (EQA).

Once a centre has registered learners, these visits will occur, as a minimum, every six months and will be face-to-face at a centre.

Our EQAs offer advice and guidance on any aspect of quality assurance in between formal visits, via telephone or email, and additional visits can be arranged.

These meetings will involve verifying that:

- all of the staff, resources, processes and procedures are still in place
- the centre is continuing to meet the approved centre criteria (those signed off during the initial centre approval visit)
- there is evidence of meaningful employer involvement in delivery.

A major part of the verification process is to check that the centre's policies and procedures (including internal standardisation minutes, record keeping, IQA/assessor records and materials) meet AQA's requirements and ensure valid and reliable assessment.

The EQA will look at a representative sample of learner work to verify that the results awarded by the centre are valid, as well as reviewing evidence of the activities that have been undertaken to standardise assessments.

These samples will be taken from different sites if the centre operates at more than one location, from different centre assessors or IQAs and at different stages of delivery – all samples will be selected by the EQA.

As part of the sample, the EQA will request examples of learner work at Pass, Merit and Distinction. This will also support the centre in their internal standardisation.

If centre assessment decisions are found to be inconsistent, adjustments can be made (at a learner and cohort level) or in more severe cases (where a fundamental inconsistency or non-compliance is identified), sanctions (from a Level 1 Action plan through to Level 4 Suspension of delivery) can be put in place.

## 15.3 Sanctions

Sanctions are used to help process improvement and are a way of protecting the validity of assessments or assessment decisions. We will only ever impose sanctions on a centre that are proportionate to the extent of the risk identified during the quality assurance process.

Sanctions can be applied at a learner, centre or centre staff level – and they can be at qualification or centre level and take the following form:

- Level 1: Action point in EQA report.
- Level 2: Suspension of direct claims status (where applicable).
- Level 3: Suspension of learner registration and/or certification.
- Level 4: Withdrawal of centre approval for a specific qualification.

Further information on levels and application of sanctions can be found in the *AQA Centre Administration Guide for Technical and Vocational Qualifications*.

# 16 Internal assessment and quality assurance

## 16.1 Overview

Unit D/506/6087 Customer communications and Unit D/506/6090 Digital essentials of the Level 3 Foundation Technical Level Business: Marketing Communications and Unit D/506/6087 Customer communications, Unit D/506/6090 Digital essentials, Unit H/506/6088 Marketing research, Unit H/506/6091 Stakeholder engagement and Unit M/506/6076 Collaborative project of the Level 3 Technical Level Business: Marketing are internally assessed by the centre.

All assessment decisions that are made internally within a centre are externally quality assured by AQA.

AQA has worked with employers and professional bodies to produce guidance on what is the most appropriate form of assessment or evidence gathering for all internal centre assessment.

The most appropriate method of assessment (or evidence gathering) is detailed against each unit. Should a centre wish to use an alternative method of assessment to that detailed, then justification must be provided during AQA quality assurance visits to the centre.

This justification needs to explain why the centre feels their approach to assessment is more appropriate, efficient or relevant to the learner and/or subject and should be provided in writing to the AQA external quality assurer.

Centres should tailor the assessment to suit the needs of the learner, and internal assessments can take place at a time to suit the centre or learner.

Centres should take a best practice approach with learners being assessed through real life or work based activity to generate the required evidence (see Section 8.1 on Meaningful employer involvement).

## 16.2 Role of the assessor

The role of the assessor is to:

- carry out initial assessments of learners to identify their current level of skills, knowledge and understanding and any training or development needs
- review the evidence presented against the requirements of the qualification, to make a judgement on the overall competence of learners
- provide feedback to learners on their performance and progress. this feedback needs to give learners a clear idea of the quality of the work produced, where more work is required and how best to do this.

## 16.3 Assessor qualifications and experience

In order to assess learners working towards these qualifications, assessors must:

- have appropriate knowledge, understanding and skills relevant to the units within this qualification
- have experience as a practitioner and/or within teaching and training with significant experience of creating programmes of study in relevant subject areas
- undertake activities which contribute to their continuing professional development (CPD).

## 16.4 Applying portfolio assessment criteria

When assessing learners' work, the centre should consider the level of attainment in four broad areas:

- the level of independence and originality
- the depth and breadth of understanding
- the level of evaluation and analysis
- the level of knowledge, skills or competency demonstrated.

## 16.5 Authentication of learner work

The centre must be confident that a learner's work is their own. You must inform your learners that to present material copied directly from books or other sources such as the internet, without acknowledgement, will be regarded as deliberate deception. This also includes original ideas, as well as the actual words or artefacts produced by someone else.

Learners' work for assessment must be undertaken under conditions that allow the centre to authenticate the work. If some work is done unsupervised, then the centre must be confident that the learners' work can be authenticated with confidence – eg being sufficiently aware of an individual learner's standard and level of work to appreciate if the evidence submitted is beyond the level of the learner.

The learner is required to sign a declaration that the work submitted for assessment is their own. The centre will also countersign this declaration that the work was carried out under any specified conditions – recording details of any additional assistance. This must be provided with the learner's work for external quality assurance purposes.

Any assistance given to an individual learner beyond that given to the group as a whole, even if within the parameters of the specification, must also be recorded.

If some work is done as a part of a team, the centre must be confident that the learner's contribution to that team activity can be clearly identified and authenticated.

## 16.6 Tutor assistance and feedback

Whilst learners are undertaking assignment tasks, tutors must ensure that any assistance given, or offered as a result of a learner's question and/or request for help, does not compromise the learner's ability to independently perform the task in hand.

During assessment, tutors can give general feedback and support to learners, most notably, on the following:

- development of the required knowledge and skills underpinning the assignment at hand
- confirmation of the assessment criteria being assessed
- clarification of the requirements of the *Assignment brief*
- identification of assignment deadlines.

Tutors, however, must **not** assist learners directly and specifically with assignment tasks.

Tutors are not permitted to provide 'formative' feedback on learner's work, ie feedback, prior to submission for marking, on an assignment/task that will enable the learner to amend the assignment/task to improve it.

Once learner work has been submitted for marking, then tutors must give clear and constructive feedback on the criteria successfully achieved by the learner. Tutors should also provide justification

and explanation of their assessment decisions. Where a learner has not achieved the performance criteria targeted by an assignment, then feedback should not provide explicit instructions on how the learner can improve their work to achieve the outstanding criteria. This is to ensure that the learner is not assisted in the event that their work is considered for resubmission.

## 16.7 Research and references

Where learners are required to undertake research towards the completion of a task, they should reference their research results in a way that is informative, clear and consistent throughout their work. We do not prescribe a specific way to organise references, but we expect tutors to discuss this with learners and identify a 'house style' that learners are then expected to use. Learners may include a bibliography of relevant sources on larger assignments where there has been significant research and there is value in recording all sources fully.

## 16.8 Role of the internal quality assurer

An internal quality assurer (IQA) must be appointed to ensure the quality and consistency of assessments within the centre. Each assessor's work must be checked and confirmed by an internal quality assurer.

The IQA must observe assessors carrying out assessments, review assessment decisions from the evidence provided and hold standardisation meetings with the assessment team to ensure consistency in the use of documentation and interpretation of the qualification requirements.

All assessment decisions made within a centre must be standardised to ensure that all learners' work has been assessed to the same standard and is fair, valid and reliable.

Evidence of all standardisation activity should be retained by the centre and could take the form of, for example, records of training or feedback provided to assessors, minutes of meetings or notes of discussions.

Our external quality assessors (EQAs) will always be happy to provide guidance and assistance on best practice.

Internal standardisation activity may involve:

- all assessors marking trial pieces of work and identifying differences in marking standards
- discussing any differences in marking at a training meeting for all assessors
- cross-moderation of work between assessors.

## 16.9 Internal quality assurer qualifications and experience

In order to internally quality assure the assessment of learners working towards these qualifications, IQAs must:

- have appropriate knowledge, understanding and skills relevant to the units within this qualification
- have experience as a practitioner and/or within teaching and training with significant experience of creating programmes of study in relevant subject areas
- undertake activities which contribute to their continuing professional development (CPD).

## 16.10 Record keeping

The centre must be able to produce records that show:

- the assessor and IQA allocated to each learner
- the evidence assessed
- the dates of assessment and IQA
- details of internal standardisation activities of the assessor – what, when and by whom
- the grade awarded and rationale for this.

# 17 Resits, resubmissions and retakes

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## 17.1 Note on terminology

**Resits** refer to learners taking further attempts at an examined/externally assessed unit.

**Resubmissions** refer to learners undertaking a second attempt at an internally assessed unit task/assignment prior to external quality assurance.

**Retakes** refer to learners undertaking a second attempt at an internally assessed unit after external quality assurance.

## 17.2 Rules on resits, resubmissions and retakes

Resits and retakes are permitted where a learner has either failed the requirements of the unit, or where they wish to improve on a grade awarded.

For certification purposes, AQA will recognise the best achievement by the learner and not the most recent.

### Resitting an exam or external assessment

The learner is permitted **three** attempts (one initial and two resits) in relation to each examined/externally assessed unit of the specification.

Learners who have been awarded the Foundation qualification and have progressed to the full Technical Level are allowed to use the resit opportunities to go back and improve the grade achieved in the external assessment. Any improvement cannot be used to upgrade and reclaim the previously awarded Foundation qualification.

### Resubmitting internal assessments

The learner is permitted **one** resubmission in relation to each internally assessed unit of the qualification, but only when the tutor believes the learner can achieve the outstanding criteria without further guidance. Any resubmission of work must be undertaken prior to external moderation.

### Retaking internal assessments

The learner is permitted **one** retake in relation to each internally assessed unit of the qualification. This could mean the learner doing the entire unit work again, or simply correcting a task/assignment before the unit is again submitted for external moderation by AQA. With a retake, learners are not allowed a resubmission opportunity.

Any retake and/or resubmission of work must be completed within a defined and reasonable period of time following learner feedback of the initial assessment. Any work provided as evidence must be authenticated by the learner as their own.



# 18 Grading

## 18.1 Overview

Performance in all units is graded at Pass, Merit or Distinction. These unit grades are then converted into points and added together to determine the overall grade for the qualification.

The overall Foundation Technical Level in Business: Marketing Communications (TVQ01021) qualification is graded as P, M, D, D\*.

The overall Technical Level in Business: Marketing (TVQ01020) qualification is graded as PP, MP, MM, DM, DD, D\*D, D\*D\*.

## 18.2 Internally assessed units

Centres must ensure that all assessment criteria in the unit are covered during the teaching and learning process so that learners can meet the requirements. Work should be assessed against the grading criteria provided within each unit.

- To achieve a Pass, a learner must have satisfied all Pass criteria.
- To achieve a Merit, a learner must achieve all of the Pass and all of the Merit criteria.
- To achieve a Distinction, a learner must achieve all of the Pass, Merit and Distinction criteria.

## 18.3 Externally assessed (examined) units

These units are assessed by AQA using a marks-based scheme. After the assessment has taken place and been marked, the grade boundaries are set by AQA. These grade boundaries are based on the level of demand of the assessment and learners' performance – all learners that took the assessment, not just those in your centre.

When the assessment results are shared with the centre, AQA will report on the grade boundaries.

**Note:** These grade boundaries may change for each assessment window according to the demand of the assessment – this is important to maintain standards across each window.

Learners' grades are converted into points.

## 18.4 Points per grade – unit level

Table 1 shows the points for each grade at a unit level.

Table 1: Points per grade

Grade	Points per unit
Pass	36
Merit	54
Distinction	72

## 18.5 Final grade for overall qualification

The final grade for the overall qualification will be calculated by adding together the points achieved for each unit.

The total possible number of points that can be achieved for the Foundation Technical Level Business: Marketing Communications is 288.

The total possible number of points that can be achieved for the Technical Level Business: Marketing is 576.

### Points for overall qualification grade

**Table 2: Foundation Technical Level Business: Marketing Communications (TVQ01021)**

Grade	Points boundary
P	144
M	198
D	252
D*	270

**Table 3: Technical Level Business: Marketing (TVQ01020)**

Grade	Points boundary
PP	288
MP	360
MM	396
DM	468
DD	504
D*D	522
D*D*	540

## 18.6 The 'Near Pass' rule

A near pass will be applied to an **externally assessed unit or external assignment** for those learners who may fall just short of a pass grade. The unit grade will still be reported as a grade U, since the learner will not have performed to the minimum standard required for a Pass grade, but will qualify as a near pass for the purposes of determining the overall qualification grade.

The actual mark required to achieve the 'near pass' grade on an examined unit will change from year to year, depending on the grade boundaries that have been set. For an external assignment a learner will achieve a 'near pass' if they satisfy all but one of the Pass criteria for the unit. A learner will receive 27 points if they achieve a Near Pass.

A learner is allowed one Near Pass in an externally assessed unit or external assignment in a Foundation Technical Level or up to two Near Pass results (six or eight unit Technical Level) or up to three Near Pass results (12 unit Technical Level).

All other eligibility requirements for achieving the qualification will remain the same: All other eligibility requirements for achieving the qualification will remain the same:

- the total points score is above the Pass threshold; **and**
- all other units are passed

# 19 Administration arrangements

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Full details of all of the administration arrangements relating to AQA Tech-levels can be found in the *AQA Centre Administration Guide for Technical and Vocational Qualifications*, including:

- how to apply for centre approval
- registration of learners
- dealing with recognition of prior learning (RPL)
- how to make examination entries
- dealing with missed examination dates
- examination invigilation arrangements
- how to make claims for certificates
- how to appeal against an assessment, IQA or EQA decision
- retention of learner work and assessment/IQA records
- dealing with potential malpractice or maladministration.

Details of all AQA fees can be found on the AQA website at [aqa.org.uk](http://aqa.org.uk)

# 20 Appendix A: Transferable skills standards and guidance

## 20.1 Transferable skills – communication standards (oral)

Evidence must clearly show that the learner can:

<b>CO1</b>	Prepare a suitable presentation.	1.1 Research suitable topics for the presentation. 1.2 Research the most appropriate format for the presentation. 1.3 Plan the structure of the presentation. 1.4 Make use of any appropriate supporting materials and prepare any other resources needed for the presentation.
<b>CO2</b>	Use language, vocabulary, tone and style suited to the complexity of the topic and the context.	2.1 Use appropriate language and vocabulary. 2.2 Structure what is presented to help the audience follow the sequence of the main points and ideas. 2.3 Use tone and style of presentation appropriate to the audience and environment.
<b>CO3</b>	Use a variety of methods to engage the audience.	3.1 Provide examples to illustrate complex points. 3.2 Use relevant images from appropriate sources to illustrate key points. 3.3 Use at least one additional method to engage the audience.

### Required evidence<sup>9</sup>

- Learner preparation evidence (planning notes, research).
- Learner presentation including all support materials.
- Assessor observation record\*.

### Learner guidance

The learner should consider the purpose, topic and audience as follows:

- the presentation should be eight minutes long to allow the learner to demonstrate the appropriate skills
- the presentation must always be contextualised within the technical subject content, and should not be simulated
- an audience of at least two or three people which may or may not include peers.

<sup>9</sup>For evidence marked with an asterisk (\*) recording documents are available for centres to use – please see [aqa.org.uk/tech-levels/transferable-skills](http://aqa.org.uk/tech-levels/transferable-skills)

## C01

There should be evidence showing that the learner has:

- researched the technical subject content of a complex matter
- selected information relevant to the purpose of the presentation
- planned how to structure the presentation
- planned to use a relevant image or images to illustrate key points of the presentation – that adds value to the overall presentation
- included one additional method to engage audience for example questioning, completion of hand-out, discussion etc.

## C02

Learners should:

- give a well-structured delivery and must clearly highlight the main points of their presentation using tone, gesture or expression
- use appropriate vocabulary suited to the audience and environment.

## C03

Learners must:

- give examples to explain ideas
- make effective use of an image or images and other support materials to engage the audience and to illustrate key points, for example through use of video clips, explanatory notes or other technically related activities.

## Tutor guidance

- Tutors should use an observation record to support their assessment.
- Tutors should ensure that those observing are familiar with the observation record content and purpose.
- The presentation may be delivered through spoken communication or using sign language.
- Tutors should look for fitness of purpose and styles of presentation. Brief notes may be used as a prompt, but learners should not rely on them entirely.

## 20.2 Transferable skills – communication standards (written)

Evidence must clearly show that the learner can:

<b>CW1</b>	Select appropriate formats for presenting information as a report.	1.1 Decide on the most appropriate format for the technical report. 1.2 Plan the structure of the technical report. 1.3 Make use of any appropriate supporting materials and prepare any other resources needed for the technical report.
<b>CW2</b>	Select and use an appropriate style and tone to suit their audience.	2.1 Use appropriate language and vocabulary. 2.2 Structure the technical report to help the audience follow the sequence of the main points and ideas. 2.3 Use tone and style appropriate to the intended recipient(s).
<b>CW3</b>	Organise material coherently, to suit the length, complexity and purpose of their technical report, proofread and where necessary, re-draft documents.	3.1 Spell, punctuate and use grammar accurately. 3.2 Make their meaning clear. 3.3 Use relevant images from appropriate sources to illustrate key points. 3.4 Proofread their technical report. 3.5 Obtain feedback and amend technical report accordingly.

### Evidence required<sup>10</sup>

- A learner technical report of at least 1,000 words excluding support materials.
- An assessor recording form\*.

### Learner guidance

The learner should:

- produce a technical report about a complex subject which must be at least 1,000 words long
- include subject matter, which may well have a number of strands that is challenging to the individual learner in terms of the ideas it presents.

<sup>10</sup>For evidence marked with an asterix (\*) recording documents are available for centres to use – please see [aqa.org.uk/tech-levels/transferable-skills](http://aqa.org.uk/tech-levels/transferable-skills)

## CW1

It is essential that learners know how to:

- organise their technical report
- link paragraphs in various ways
- use features, such as indentation and highlighting, to suit different types of documents.

## CW2

Learners should know how to:

- produce a technical report that takes account of the vocabulary, tone and techniques normally used when producing documents for particular purposes and different recipients
- write with confidence and with the appropriate degree of formality.

## CW3

In supporting key points:

- images that could be used include: graph, sketch, picture or material taken from a presentation
- learners should know how to check their work to ensure that spelling, punctuation and grammar are accurate
- learners should know how to write grammatically correct sentences, including correct use of a variety of verb tense, form and person (for example passive voice); spell accurately, complex, irregular and technical words and use punctuation effectively for example bullet points, semicolon, colon, apostrophes) to ensure their meaning is clear.

## Tutor guidance

For the technical report produced, assessors should look for evidence that the learner has:

- selected an appropriate format for report
- organised relevant information using a clear and coherent structure
- used technical vocabulary when appropriate
- ensured that text is legible with accurate use of spelling, grammar and punctuation.

The learner should not be penalised for one or two errors providing meaning is still clear.

## 20.3 Transferable skills – problem-solving standards

Evidence must clearly show that the learner can:

<b>PS1</b>	Identify a problem and the tools and techniques that could be used to explore the problem.	1.1 Identify, analyse and describe the problem. 1.2 Identify a variety of tools and techniques which could be used to explore the problem. 1.3 Plan how you will investigate the problem highlighting which tools and techniques will be used.
<b>PS2</b>	Implement both the plan to investigate the problem and the plan to solve the problem.	2.1 Implement the plan for investigating the problem and seek support and feedback from others as necessary. 2.2 Record and analyse the results of the investigation. 2.3 Identify the solution(s) to solve the problem. 2.4 Plan the steps to be taken in order to solve the problem, identifying any risks, and implement the solution.
<b>PS3</b>	Check if the problem has been resolved and review the approach to tackling problems.	3.1 Check whether the problem has been resolved/solved. 3.2 Analyse the results and draw conclusions on the success of the problem-solving process. 3.3 Review the approach to tackling/solving the problem, including whether other approaches might have proved more effective.

### Evidence required<sup>11</sup>

- Explore/plan\* – to be completed by the learner.
- Do\* – to be completed by the assessor.
- Review\* – to be completed by the assessor.

### Learner guidance

The learner must demonstrate:

- a systematic approach to tackling problems, including identifying which is the most appropriate method, then developing a plan and implementing it
- how they went about the problem-solving process.

Evidence should be on individual performance. A group approach to problem-solving does not allow learners to achieve specific elements of the standards.

Activities must always be in relation to the core subject content and should not be simulated.

Effective definition of the problem will help the learner tackle it systematically and produce valid evidence. Tutors may discuss with learners the most appropriate definition of the problem and what sort of results might be expected so the learner is clear on what would show that the problem had been solved.

<sup>11</sup>For evidence marked with an asterisk (\*) recording documents are available for centres to use – please see [aqa.org.uk/tech-levels/transferable-skills](http://aqa.org.uk/tech-levels/transferable-skills)



## PS1

Learners should:

- recognise, identify and describe the main features of the problem
- identify how they will explore the problem and the tools and techniques they will use
- use a variety of methods for exploring the problem.

## PS2

Learners should:

- obtain approval to implement their plan from an appropriate person, which could be the tutor or supervisor
- make effective judgements, based on feedback and support available, when putting their plan into action
- check their plan regularly for progress and revise it accordingly.

## PS3

Learners should:

- use an appropriate method for checking if the problem has been solved. For example if a learner designed a procedure or process for improving a system that records information, they would need to test this out and report back on their findings
- know how to describe the results in detail and draw conclusions on the success of their problem-solving skills
- reflect back on the process considering areas such as:
  - did they spend enough time considering the features of the problem?
  - were they effective in planning action points to tackle the problem?
  - did they take a logical approach to checking if the problem had been solved/resolved?

In some circumstances, achievement of the standard may be possible even if the problem has not been solved or resolved, especially if factors were outside of their control, and the learner was able to demonstrate the process of tackling the problem.

## Tutor guidance

- Tutors should check problem-solving implementation planning.
- Tutors may be required to provide a witness statement in support of evidencing the processes.

## 20.4 Transferable skills – research standards

Evidence must clearly show that the learner can:

<b>R1</b>	Design a research study.	1.1 Identify possible topics for research. 1.2 Choose one topic, identifying appropriate objectives for detailed research, and plan how to carry out the research. 1.3 Select a variety of resources to gather relevant information and identify appropriate methods and techniques to carry out the research.
<b>R2</b>	Conduct data collection and analysis.	2.1 Collect data using the appropriate methods to test the hypotheses/theories. 2.2 Carry out an appropriate analysis of the data. 2.3 Draw appropriate conclusions that are supported by the evidence from the data analysis.
<b>R3</b>	Present findings of the research and evaluate the research activities.	3.1 Prepare and present results of research. 3.2 Present the information in a clear and appropriate format adapted to the needs of the audience. 3.3 Seek feedback and use it to support own evaluation of research skills.

### Required evidence<sup>12</sup>

- Plan\* – to be completed by the learner.
- Do\* – to be completed by the assessor.
- Review\* – to be completed by the assessor.
- Results of research.

### Learner guidance

The learner should demonstrate they can:

- identify clear and appropriate objectives for the research study
- plan and carry out research activities with the particular objectives in mind
- design their research study in a systematic way
- present their findings as well as evaluating their research skills and activities
- be clear about the objectives of the research study, for example to assess the positive and negative impact of digital photography on sports journalism to predict future trends
- identify sources, methods and strategies they plan to use to investigate the topic
- carry out the research within a clearly defined structure, with a measure of complexity that should be reflected in the breadth and nature of the research objectives
- undertake the analysis required to make the best use of information/data and the requirement to give a clear justification for their conclusions
- make different research methodologies.

Activities must always be contextualised within the core subject content, and should not be simulated.

<sup>12</sup>For evidence marked with an asterisk (\*) recording documents are available for centres to use – please see [aqa.org.uk/tech-levels/transferable-skills](http://aqa.org.uk/tech-levels/transferable-skills)

## RS1

The learner should explore:

- a variety of possible topics to research and should spend time deciding on clear and measurable objectives when designing their research study
- objectives and discuss and agree them with a tutor or supervisor
- a wide variety of sources when gathering their information
- the use of at least three different types of resource
- one source that is primary (gathered by the learner), for example, interview, questionnaire, survey, rather than from secondary for example encyclopaedia, interpretations of original material.

The learner should produce a plan detailing how they will carry out the research.

## RS2

The learner should:

- keep a record of the sources used
- independently collect information including data
- analyse information collected and identify information and data most relevant to their research objectives.

## RS3

When presenting their findings, learners should:

- use a format that is most appropriate to the content in terms of audiences, subject matter and research objectives
- communicate research findings clearly
- seek feedback from appropriate people
- show how they have used this feedback to help evaluate their research skills
- evaluate their research activities addressing all aspects including identifying the research objectives, collecting and analysing data and/or information, and recording, presenting and explaining findings.

## Tutor guidance

- Tutors should agree research objectives with learner.
- Tutors should check that different types of resource have been used.

## 20.5 Transferable skills – teamwork standards

Evidence must demonstrate the learner can:

<b>TW1</b>	Plan the work with others.	1.1 Agree realistic objectives for working together and what needs to be done in order to achieve them. 1.2 Share relevant information to help agree team roles and responsibilities. 1.3 Agree suitable working arrangements with other team members.
<b>TW2</b>	Develop and maintain cooperative ways of working towards agreed objectives checking progress on the way.	2.1 Organise and complete own tasks efficiently to meet responsibilities. 2.2 Seek effective ways to develop cooperation such as ways to resolve conflict and maintain open communication. 2.3 Share accurate information on progress and agree changes where necessary to achieve objectives.
<b>TW3</b>	Review working with others and agree ways of improving collaborative work in the future.	3.1 Agree the extent to which working with others has been successful and objectives have been met. 3.2 Identify factors, including their own role, in influencing the outcome. 3.3 Provide details of how they could improve working with others in the future, including interpersonal skills.

A group/team is defined as **three or more** people (eg peer, co-worker) who are working towards shared objectives. It is not acceptable for tutors/assessors to be part of the team. The nature of the teamworking should reflect the sector in which the qualification sits, eg engineering, business or IT.

### Required evidence<sup>13</sup>

- Plan\*.
- Do\*.
- Review\*.
- Minutes of meetings.
- Witness statement.
- Peer statements.

### Learner guidance

Meeting the standard will confirm that the learner has:

- demonstrated the ability to work cooperatively with others
- be clear about the objectives the team or group is working towards and their own responsibilities
- planned and carried out the work supporting others, reviewing outcomes and suggesting ways of improving work with others.

Activities must always be contextualised within the core subject content, and should not be simulated.

<sup>13</sup>For evidence marked with an asterisk (\*) recording documents are available for centres to use – please see [aqa.org.uk/tech-levels/transferable-skills](http://aqa.org.uk/tech-levels/transferable-skills)

## TW1

As part of the initial team planning meeting the learner should:

- offer suggestions and listen to others to agree realistic objectives, prioritise tasks and identify resources and timescales
- be clear about their own responsibilities and the areas of work for which they are answerable to others
- produce a plan showing what needs to be done by the team clarifying own responsibilities and arrangements for working with others in the team.

## TW2

Learners should take responsibility for:

- organising their own work to meet the agreed deadlines
- the use of correct and appropriate techniques and approaches when carrying out tasks
- actively looking for ways to develop and support cooperative working, including helping to deal with conflict and taking a lead role in anticipating the needs of others
- considering the rights and feeling of others
- ensuring at least one team progress meeting should be held before the final review meeting.

## TW3

During the team review meeting learners should:

- provide information about their own contribution to the work of the team ie what did they do and how did they interact with other members of the group
- explain how improved inter-personal skills could contribute to more effective collaboration in the future (for example 'I should listen more carefully when negotiating activities/tasks')
- identify improvements they could make in managing tasks (for example 'I could have been better organised with notes at team meetings').

## Tutor guidance

Tutors are encouraged to support the evidence process by completing a witness statement.

# 21 Appendix B: Example synoptic project for Unit 8: Collaborative project

Timothy Barrett, a graduate from a local university, was in the process of setting up a bubble tea shop in the local area, ie 'The Bubble Tea Shop'. He had trialled this with a 'pop up' shop at the recent fresher's event which was hugely successful. He has completed a business plan already, and has been successful in showing this to the bank and gaining a start-up loan. Timothy had previously used university students to help him with his marketing for the 'pop up' store during fresher's week, but can no longer use the students as they are all busy with their exam period. Therefore, Timothy has approached the college to help with the marketing for The Bubble Tea Shop. Timothy sees his target market mainly as students of both genders in the local area, aged around 16 to 22. He also hopes that recent graduates aged 22 to 26 working in the area will also be interested in the concept of bubble tea. The task is to design a marketing proposal for The Bubble Tea-shop, and to present these ideas.

## Project idea example

### Marketing proposal for The Bubble Tea Shop

Project description	Performance outcomes and criteria from other units
<p>Learners have been asked to prepare and present a marketing plan for The Bubble Tea Shop, a local bubble tea shop that is opening in the local area. They will then be required to plan and complete all marketing activities associated with the shop. Learners will be required to keep a log of all activities in which they participate.</p> <p>Learners will set up and work in a team to plan the success of the campaign. They will need to work collaboratively to ensure the successful presentation of this campaign.</p> <p>Learners will need to work within the project team in order to be able to summarise their own abilities and those of the other team members. Ultimately, they will evaluate the performance of the team in making the campaign a potential success.</p>	<p><b>Unit 1: Competitive business environment</b></p> <p><b>AO1 B</b> Apply knowledge and understanding of business vision, aims and objectives to business contexts and analyse the suitability and/or achievement of these. <b>Learners would need to set aims and objectives for their marketing campaign for The Bubble Tea Shop.</b></p> <p><b>AO2 C</b> Apply knowledge and understanding of social and economic trends to business contexts and analyse the impact of these on business costs and sales. <b>Learners will need to take into account social trends and the growth of bubble tea in areas of the UK; they will also need to be aware of any economic activity that could impact possible sales.</b></p> <p><b>AO3 A/B</b> Apply knowledge and understanding of competition and competitive position to business contexts. Use Porters 5 forces model to analyse the degree of competitive rivalry within a given market. <b>Learners will need to research and analyse the competition in the local area before designing the marketing proposal.</b></p>

Project description	Performance outcomes and criteria from other units
	<p><b>Unit 2: Marketing principles</b></p> <p><b>AO1 B</b> Role of marketing in achieving customer satisfaction. <b>Learners will need to ensure that they understand the importance of marketing to satisfy customer needs.</b></p> <p><b>AO2 E/F</b> Customer buying process/customer needs and wants. <b>Learners will need to plan into their marketing campaign the needs and wants of the target market and also understand why they may purchase the product.</b></p> <p><b>AO4 A</b> The 4ps marketing mix</p> <p><b>AO4 B</b> The extended marketing mix (7ps)</p> <p><b>AO4 D</b> The marketing mix and how it is used to meet customers' needs and wants. <b>Learners would need to be aware of the marketing mix, both 4ps and the extended mix in order to market the business idea. Through understanding and using this marketing mix effectively learners would therefore be able to meet the customers' needs and wants.</b></p> <p><b>Unit 3: Customer communications</b></p> <p><b>PO1</b> Understand customers. <b>Learners will need to explore and understand customer segmentation and how this can be used to benefit the marketing of the business.</b></p> <p><b>PO2</b> Explore the nature and importance of customer relationships and how to build them. <b>Learners will need to factor into their marketing campaign how they may foster good customer relationships for the business.</b></p> <p><b>PO4</b> Understand different marketing communications tools. <b>Learners will need to identify the different communication tools that can be used for the campaign, and for their target market for the business.</b></p> <p><b>PO5</b> Develop a marketing communications campaign. <b>Learners will need to plan and work in a collaborative team to develop an appropriate marketing communications campaign for the business.</b></p>

Project description	Performance outcomes and criteria from other units
	<p><b>PO6</b>          Illustrate how the marketing communications campaign will be put into practice. <b>Learners will then be required to put this communications plan into practice and to be able to schedule resources and ensure the success of the marketing campaign.</b></p> <p><b>Unit 4: Digital essentials</b></p> <p><b>PO5</b>          Develop an outline digital marketing campaign. <b>Learners could use digital marketing in their campaign for the business as the business owner is targeting the age groups that have the most access to this type of marketing.</b></p> <p><b>Unit 5: Responsible business practices</b></p> <p><b>PO1</b>          Understand how legal issues influence business activities. <b>Learners would need to be able of and take into account any legal requirements for the company during the planning process.</b></p> <p><b>PO2</b>          Understand how social and ethical concerns influence business activities. <b>Learners would need to take into account any social and ethical concerns that their target market has throughout the marketing proposal process.</b></p> <p><b>Unit 6: Marketing research</b></p> <p><b>PO5</b>          Develop and undertake a primary marketing research activity. <b>Learners will need to undertake market research in order to find out the needs of their target market and what products and prices they are prepared to buy and pay for.</b></p> <p><b>PO6</b>          Report and communicate findings of the primary market research activity. <b>All learners in the team will need to be aware of the outcomes of the market research activity, and therefore reporting on the findings will be beneficial for the marketing proposal for the business.</b></p>



Project description	Performance outcomes and criteria from other units
	<p><b>Unit 7: Stakeholder engagement</b></p> <p><b>PO3</b> Understand the needs of different stakeholder groups. <b>Learners will need to understand the different stakeholder groups that they are targeting with their marketing campaign and how these needs can differ.</b></p> <p><b>PO5</b> Develop communications for external stakeholders.</p> <p><b>PO6</b> Develop communications for internal stakeholders. <b>Learners will need to take into account how to communicate with the various stakeholder groups, both internal and external – this should be accounted for in their planning.</b></p>

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E: [techlevels@aca.org.uk](mailto:techlevels@aca.org.uk)

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