

# **Level 3 Certificate in Principles of Marketing (QCF) (7734-03)**

March 2011 Version 1.0



## Qualification at a glance

<b>Subject area</b>	Marketing
<b>City &amp; Guilds number</b>	7734
<b>Age group approved</b>	16+
<b>Entry requirements</b>	There are no entry requirements
<b>Assessment</b>	Assignment per unit
<b>Automatic approval</b>	Available
<b>Support materials</b>	Qualification handbook Assessment pack Sample assignments
<b>Registration and certification</b>	See Walled Garden/Online Catalogue for last dates

<b>Title and level</b>	<b>City &amp; Guilds number</b>	<b>Accreditation number</b>
Level 3 Certificate in Principles of Marketing	7734-03	600/0929/9



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# 1 Introduction

This document tells you what you need to do to deliver the qualification:

Area	Description
Who is the qualification for?	It is for learners who work or want to work in the marketing sector
What does the qualification cover?	Allows learners to learn, develop and practise the skills required for employment and/or career progression in the marketing sector.
Is the qualification part of a framework or initiative?	Serves as a technical certificate in the Marketing Advanced Apprenticeship framework.
Who did we develop the qualification with?	Was developed in association with the Council for Administration
What opportunities for progression are there?	<p>Allows candidates to progress into employment or to the following City &amp; Guilds qualifications:</p> <ul style="list-style-type: none"> <li>• Level 2/3 NVQ Certificate/Diploma in Marketing (7712-02/03/04)</li> <li>• Level 2/3 NVQ Certificate/Diploma in Sales (6801-01/02/03/04)</li> <li>• Level 2/3 Certificate in Principles of Sales (7711-02/03)</li> <li>• Level 2/3 NVQ Certificate/Diploma in Business and Administration (4428-02/03)</li> <li>• Level 2/3 Certificate in Principles of Business and Administration (4475-02/03)</li> </ul>

## Structure

To achieve the **Level 3 Certificate in Principles of Marketing**, learners must achieve 13 credits from the mandatory units and a minimum of 6 credits from the optional units available.

Unit accreditation number	City & Guilds unit number	Unit title	Credit value
<b>Mandatory</b>			
F/502/8206	202	Understanding legal, regulatory and ethical requirements in sales or marketing	2
T/502/9935	301	Principles of marketing and evaluation	7
D/601/7644	302	Principles of personal responsibilities and how to develop and evaluate own performance at work	4
<b>Optional</b>			
K/502/9933	303	Principles of market research	5
F/502/9937	304	Principles of digital marketing and research	7
J/502/9938	305	Principles of marketing stakeholder relationships	3
F/502/8223	306	Understanding the relationship between sales and marketing	3



## 2 Centre requirements

### Approval

To offer this qualification, centres will need to gain both centre and qualification approval. Please refer to the *Centre guide* and *Providing City & Guilds Qualifications* for further information.

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualification before designing a course programme.

### Resource requirements

#### Centre staffing

Staff delivering this qualification must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be technically knowledgeable in the area for which they are delivering training and/or have experience of providing training. This knowledge must be to the same level as the training being delivered

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but cannot internally verify their own assessments.

#### Continuing professional development (CPD)

Centres must support their staff to ensure that they have current knowledge of the occupational area, that delivery, mentoring, training, assessment and verification is in line with best practice, and that it takes account of any national or legislative developments.

### Candidate entry requirements

City & Guilds does not set entry requirements for this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

#### Age restrictions

City & Guilds cannot accept any registrations for candidates under 16 as this qualification is not approved for under 16s.



### 3 Delivering the qualification

#### Initial assessment and induction

An initial assessment of each learner should be made before the start of their programme to identify:

- if the learner has any specific training needs,
- support and guidance they may need when working towards their qualification.
- any units they have already completed, or credit they have accumulated which is relevant to the qualification.
- the appropriate type and level of qualification.

We recommend that centres provide an induction programme so the learner fully understands the requirements of the qualification[s], their responsibilities as a candidate, and the responsibilities of the centre. This information can be recorded on a learning contract.

#### Support materials

The following resources are available for this qualification:

Description	How to access
Sample assignments	City & Guilds website
Assignment [Assessment] guide	City & Guilds website
FAQs	City & Guilds website



## 4 Assessment

### Assessment of the qualification

Candidates must:

- successfully complete one assignment for each mandatory unit
- successfully complete one assignment for each chosen optional unit

City & Guilds has written the following assessments to use with this qualification:

- assignments
- a practice or sample assignment, which can be downloaded from the City & Guilds website

### Time constraints

The following must be applied to the assessment of this qualification:

- The anticipated completion time for each assignment will be detailed in the assignment document. Centre staff should guide candidates to ensure excessive evidence gathering is avoided. Centres finding that assignments are taking longer, should contact the external verifier for guidance.
- All assignments must be completed and assessed within the candidate's period of registration.

Centres should advise candidates of any internal timescales for the completion and marking of individual assignments.

### Grading and marking

- The assignments cover underpinning knowledge through tasks and short answer questions
- All assignments are internally marked and graded subject to internal and external moderation
- The assignments for all units are graded pass/merit/distinction/fail.
- Detailed marking and grading criteria are provided in the marking criteria for each assignment.

Please also refer to the assignment guidance document available on the City & Guilds website.





## 5 Units

### Availability of units

The following units are on The Register of Regulated Qualifications:  
**<http://register.ofqual.gov.uk/Unit>**

### Structure of units

These units each have the following:

- City & Guilds reference number
- unit accreditation number (UAN)
- title
- level
- credit value
- unit aim
- relationship to NOS, other qualifications and frameworks
- endorsement by a sector or other appropriate body
- information on assessment
- learning outcomes which are comprised of a number of assessment criteria

### Summary of units

Unit number	Unit title	Credits	QCF unit number (UAN)
202	Understanding legal, regulatory and ethical requirements in sales or marketing	2	F/502/8206
301	Principles of marketing and evaluation	7	T/502/9935
302	Principles of personal responsibilities and how to develop and evaluate own performance at work	4	D/601/7644
303	Principles of market research	5	K/502/9933
304	Principles of digital marketing and research	7	F/502/9937
305	Principles of marketing stakeholder relationships	3	J/502/9938
306	Understanding the relationship between sales and marketing	3	F/502/8223

## Unit 202

## Understanding legal, regulatory and ethical requirements in sales or marketing

<b>UAN:</b>	F/502/8206
<b>Level:</b>	Level 2
<b>Credit value:</b>	2
<b>GLH:</b>	15
<b>Relationship to NOS:</b>	This unit is linked to Council for Administration NOS SLS 77 SLS 77
<b>Assessment requirements specified by a sector or regulatory body:</b>	This unit is endorsed by the Council for Administration.
<b>Aim:</b>	This unit concerns understanding the organisation's procedures for dealing with legal, regulatory and ethical requirements relating to sales or marketing and the legal, regulatory and ethical limits of the role

<b>Learning outcome</b>	The learner will:
1.	Understand an organisation's procedures for dealing with legal, regulatory and ethical requirements relating to sales or marketing
<b>Assessment criteria</b>	
The learner can:	
1.1	Describe an organisation's procedures for raising legal, regulatory and ethical concerns
1.2	Explain the <b>scope</b> of legal, regulatory and ethical requirements in sales or marketing
1.3	Explain how the <b>legal, regulatory and ethical requirements</b> relate to the business of selling or marketing
1.4	Describe <b>internal</b> and <b>external</b> sources of information on legal, regulatory and ethical requirements
1.5	Explain how an 'ethical approach' affects organisations in the sales or marketing environment
1.6	Explain the importance of contract law in sales

<b>Range</b>
<b>Scope</b> Procedures, actions, processes

**Legal requirements**

Health and Safety at Work Act, Working Time Directive and employment legislation, Copyright Laws, Equality Act, Data Protection Act

**Regulatory requirements**

FSA regulations

**Ethical requirements**

Moral, political, material

**Internal sources**

Intranet, HR Dept, Company handbook

**External sources**

Government bodies, trade associations, Health & Safety Executive, Office for Disability Issues

<b>Learning outcome</b>	The learner will:
2.	Understand the legal, regulatory and ethical limits of the sales or marketing role
<b>Assessment criteria</b>	
The learner can:	
2.1	Explain the legal, regulatory and ethical requirements relevant to the role
2.2	Describe the potential consequences of not complying with <b>legal, regulatory or ethical requirements</b>
2.3	Explain the importance of working within the limits of the role, responsibilities and authority
2.4	Explain the process for reporting legal, regulatory and ethical concerns
2.5	Explain the importance of clarity of communication with the customer to ensure common understanding of agreements and expectations

**Range****Legal requirements**

Health and Safety at Work Act, Working Time Directive and employment legislation, Copyright Laws, Equality Act, Data Protection Act

**Regulatory requirements**

FSA regulations

**Ethical requirements**

Moral, political, material

## Unit 202

## Understanding legal, regulatory and ethical requirements in sales or marketing

### Supporting information

#### Guidance

For assessment criterion 1.5, the candidate must also show understanding of what is meant by an ethical approach.

For assessment criterion 1.6, the candidate must also show understanding of what is meant by contract law including cooling off period.

For assessment criterion 2.1, the candidate must be aware of all the legislation, regulations in the range and how they are relevant to their job role.

For assessment criterion 2.3, the candidate must show an understanding of what is meant by each as well as explaining the importance of working within the limits of each.

For assessment criterion 2.4, the candidate must explain at least **three** stages of the reporting process.

<b>UAN:</b>	T/502/9935
<b>Level:</b>	Level 3
<b>Credit value:</b>	7
<b>GLH:</b>	50
<b>Relationship to NOS:</b>	<p>This unit is linked to Council for Administration NOS</p> <p>Marketing 1.3.1 Evaluate and interpret findings and identify connections in complex data</p> <p>Marketing 1.3.3 Establish and understand potential market segments</p> <p>Marketing 1.3.4 Establish target market segments for products/services and evaluate their potential</p> <p>Marketing 1.3.6 Analyse, interpret and synthesise data and research findings to inform social marketing strategy</p> <p>STC 2-1 Principles of marketing theory</p> <p>Marketing 2.1.3 Demonstrate the value of marketing to the organisation</p> <p>Marketing 3.1.1 Develop marketing strategies and plans for products and services</p> <p>Marketing 4.2.6 Evaluate advertising</p> <p>Marketing 6.2.1 Assess marketing opportunities within international and/or diverse markets</p>
<b>Assessment requirements specified by a sector or regulatory body:</b>	This unit is endorsed by the Council for Administration
<b>Aim:</b>	This unit concerns understanding the principles of market segmentation, how to assess market opportunities for new products and/or services, the principles of marketing strategy development and how to evaluate the effectiveness of a marketing strategy

<b>Learning outcome</b>	The learner will:
1.	Understand the principles of market segmentation
<b>Assessment criteria</b>	
The learner can:	
1.1	Explain the importance of defining market segments to the development and achievement of the marketing strategy

- 1.2 Explain the difference between market segments and customer classification
- 1.3 Explain how the characteristics, motivations and behaviours of potential target customers are identified
- 1.4 Explain how to cluster customers with similar characteristics
- 1.5 Describe how to confirm that **proposed segments** are real, distinctive, viable and their buying power measurable
- 1.6 Explain how to evaluate the profitability and stability of market segments
- 1.7 Describe how a range of products may appeal to different market segments
- 1.8 Explain the **motivators and inhibitors** that influence customer behaviour
- 1.9 Explain the use of Customer Relationship Management

### Range

#### Market segments

Age, gender, religion, culture, income, lifestyle

#### Customer classifications

Business customers, leisure customers

#### Proposed segments

Audience, amount of people targeted, suppliers, demographic

#### Motivators and inhibitors

Aspirations, lifestyle, income, time, status, family

### Learning outcome

The learner will:

2. Understand how to assess market opportunities for new products and/or services

### Assessment criteria

The learner can:

- 2.1 Describe the **economic and buyer behavioural factors** to be taken into account when assessing new market opportunities
- 2.2 Describe the **cultural factors** that are likely to affect customers' perception of products and/or services and sales performance
- 2.3 Explain how to identify opportunities and threats in new markets and for new products in existing markets
- 2.4 Explain how competitor and potential competitor activity may affect projected sales performance
- 2.5 Explain the basis of recommendations to exploit new market opportunities

### Range

#### Economic and buyer behavioural factors

Seasonal, recession, taxation, employment levels, cost of living

**Cultural factors**

Supply and demand, demographics

**Learning outcome**

The learner will:

3. Understand the principles of marketing strategy development

**Assessment criteria**

The learner can:

- 3.1 Describe the **topics** to be addressed in a marketing strategy
- 3.2 Explain the use of market analyses to inform the development of a marketing strategy
- 3.3 Explain how to evaluate risks to the achievement of objectives
- 3.4 Describe how to forecast sales by product and/or service
- 3.5 Explain how to present a marketing strategy including aims, objectives, actions, accountabilities, resources, budgets and forecasts
- 3.6 Explain the importance of engaging stakeholders in the development of a marketing strategy
- 3.7 Explain the significance of customer loyalty to the achievement of marketing objectives and strategy
- 3.8 Explain how to set performance indicators and evaluation arrangements that are capable of measuring returns on investment

**Range****Topics**

Research, planning and development, packaging, pricing, promotion, distribution after-sales

**Learning outcome**

The learner will:

4. Understand how to evaluate the effectiveness of a marketing strategy

**Assessment criteria**

The learner can:

- 4.1 Explain the importance of conducting the evaluation in accordance with the specification
- 4.2 Describe the **factors** to be taken into account in the evaluation of the effectiveness of a marketing strategy
- 4.3 Explain the strengths and weaknesses of different **evaluation methods**
- 4.4 Describe how to identify trends and themes from evaluation data
- 4.5 Explain how to ensure the reliability and validity of evaluation data
- 4.6 Explain how to achieve an acceptable level of statistical confidence
- 4.7 Explain how to address **critical issues** revealed by evaluation
- 4.8 Explain the importance of justifying recommendations and conclusions with evidence
- 4.9 Explain the use of **impact** analysis in the evaluation process
- 4.10 Explain the importance of marketing to the achievement of business objectives and strategies
- 4.11 Describe the links between **corporate social responsibility** and marketing strategies

<b>Range</b>
<p><b>Factors</b> On budget, timeliness, achievement of KPIs</p> <p><b>Evaluation method</b> SWOT analysis</p> <p><b>Critical issues</b> Inaccurate/unreliable data, KPIs not achieved, over budget</p> <p><b>Impact analysis</b> Positive and negative, any risk factors</p> <p><b>Corporate social responsibility</b> diversity, community responsibility, volunteering, mentoring</p>



## **Unit 301                      Principles of marketing and evaluation**

### **Supporting information**

#### **Guidance**

For assessment criterion 3.8, candidates should cover marketing plan/strategy and overall objectives, benchmarks for success and target

## Unit 302

## Principles of personal responsibilities and how to develop and evaluate own performance at work

<b>UAN:</b>	D/601/7644
<b>Level:</b>	Level 3
<b>Credit value:</b>	4
<b>GLH:</b>	32
<b>Relationship to NOS:</b>	This unit is linked to Council for Administration NOS BAA626; BAC312; BAF172
<b>Assessment requirements specified by a sector or regulatory body:</b>	This unit is endorsed by the Council for Administration
<b>Aim:</b>	This unit is about understanding ones own responsibilities for action in a business environment, including legislative and contractual responsibilities and ways of managing and evaluating own work effectively

<b>Learning outcome</b>	The learner will:
1.	Understand the employment rights and responsibilities of the employee and employer and their purpose
<b>Assessment criteria</b>	
The learner can:	
1.1	Identify the main points of contracts of employment and their purpose
1.2	Outline the main points of legislation affecting employers and employees and their purpose, including anti-discrimination and entitlement legislation
1.3	Identify where to find information on employment rights and responsibilities both internally and externally
1.4	Explain the purpose and functions of representative bodies that support employees
1.5	Explain employer and employee responsibilities for equality and diversity in a business environment
1.6	Explain the benefits of making sure equality and diversity procedures are followed in a business environment

<b>Learning outcome</b>	The learner will:
2. Understand the purpose of health, safety and security procedures in a business environment	
<b>Assessment criteria</b>	
The learner can:	
2.1 Explain employer and employee responsibilities for health, safety and security in a business environment	
2.2 Explain the purpose of following health, safety and security procedures in a business environment	

<b>Learning outcome</b>	The learner will:
3. Understand how to manage own work	
<b>Assessment criteria</b>	
The learner can:	
3.1 Explain the reasons for planning and prioritising own work	
3.2 Identify ways of planning and prioritising own work	
3.3 Explain the purpose of keeping other people informed about progress	
3.4 Describe methods of dealing with pressure in a business environment	

<b>Learning outcome</b>	The learner will:
4. Understand how to evaluate and improve own performance in a business environment	
<b>Assessment criteria</b>	
The learner can:	
4.1 Explain the purpose of continuously evaluating and improving own performance in a business environment	
4.2 Describe ways of evaluating and improving own performance in a business environment	
4.3 Explain the purpose of encouraging and accepting feedback from others	
4.4 Explain different types of career pathways and roles available	

<b>Learning outcome</b>	The learner will:
5. Understand the types of problems that may occur with own work and how to deal with them	
<b>Assessment criteria</b>	
The learner can:	
5.1 Describe the types of problems that may occur with own work	
5.2 Explain ways of dealing with problems that may occur with own work	
5.3 Explain how and when to refer problems to relevant colleagues	

<b>Learning outcome</b>	The learner will:
6. Understand the decision making process	
<b>Assessment criteria</b>	
The learner can:	
6.1 Explain key stages in the decision-making process	
6.2 Explain the purpose of not exceeding own limits of authority in making decisions	

## **Unit 302                      Principles of personal responsibilities and how to develop and evaluate own performance at work**

### **Supporting information**

#### **Guidance**

For assessment criterion 1.1, the main points to be included in a contract of employment are job title, place of work, the duties of the job, the pay, how payments will be made, hours of work, holiday entitlement, sick pay entitlement, any pension scheme arrangements, terms of notice.

The candidate needs to consider the purpose of a contract from both employer and employee perspectives, and what constitutes a breach of contract.

For assessment criterion 1.2, candidates should cover:

- Equal opportunities legislation, eg:
  - The Sex Discrimination Act 1975 and 1986
  - The Race Relations Act 1976
  - The Equal Pay Act 1970
  - The Disability Discrimination Act 1995 (DDA)

Note that the above will gradually be absorbed into the Equality Act 2010.

- Employment legislation, eg:
  - Employment Rights Act 1996
  - Employment Relations Act 1999
  - Working Time Regulations 1998
  - Employment Act 2002/2004
- Health and safety legislation, eg:
  - Health and Safety at Work Act
  - Reporting of Injuries, Disease and Dangerous Occurrences Regulations (RIDDOR) 1992
  - The Management of Health and Safety at Work Regulations 1999
  - Workplace (Health, Safety and Welfare) Regulations 1992
  - Display Screen Equipment Regulations 1992
  - The Provision and Use of Work Equipment Regulations 1998
  - Control of Substances Hazardous to Health (COSHH) 1999
- Data and intellectual property protection eg :
  - The Data Protection Act 1984/1998
  - The Copyright, Designs and Patents Act 1988

- Company legislation, eg:
  - Companies Act 1985

For assessment criterion 1.3, candidates should cover:

- Information on employment rights and responsibilities:
  - internal sources, eg line manager, HR/personnel department, union representative, intranet.
  - external sources, eg Health and Safety Executive (HSE), Department of Trade and Industry (DTI), ACAS, TUC, trade unions, Citizens' Advice Bureaux, internet, library, government agencies.

For assessment criterion 1.4, candidates should cover:

- Representative bodies such as
  - trade unions
  - professional associations
  - health & safety officers.

The candidate will need to explain the purpose and function in terms of

- advice
- information
- legal assistance
- financial help.

For assessment criterion 1.5, the candidate will need to explain how employers and employees ensure equality and diversity in practice by

- complying with discrimination legislation
- equal opportunities/diversity policies
- Equality and Human Rights Commission's guidelines.

For assessment criterion 1.6, elements that create 'diversity' are gender, age, background, culture, ethnicity, disability, religion, sexual orientation, personality and work style. Candidates will need to explain how these differences can be of benefit to an organisation, eg:

- workforce reflects the public community it is dealing with
- employees feel valued and respected and perform better
- recognition of the needs and preferences of a wider sector of the public
- wider pool of skilled talent to choose from
- lower staff costs/turnover.

For assessment criterion 2.1, candidates should cover:

- Responsibilities of both employer and employee in
  - complying with health and safety legislation (as in learning outcome 1)
  - risk assessment
  - appointing and knowing the role and duties of a first-aider or appointed person
  - maintaining environmental issues such as heating, lighting, ergonomics, ventilation, décor

- having and complying with emergency and evacuation procedures
- maintaining the security and confidentiality of data stock and personnel
- health and safety training.

For assessment criterion 2.2, candidates should cover:

- Purpose of procedures covering:
  - the use of safe working methods and equipment
  - the safe use of hazardous substances
  - what to do in the event of an emergency
  - accident reporting / first aid
  - security regarding data, stock and personnel
  - reporting of hazards/risk assessment.

For assessment criterion 3.1, the candidate will need to explain how to organise their own work and why this is important in terms of

- meeting deadlines
- achieving objectives
- being accountable to others.

They should be able to describe circumstances when deadlines cannot be met through, eg:

- interruptions
- distractions
- taking on extra work
- staff absence
- technical breakdown
- lack of resources
- unforeseen circumstances such as inclement weather, transport strikes.

They should be aware of the impact of not meeting deadlines on:

- their colleagues
- their manager
- the organisation as a whole.

For assessment criterion 3.2, candidates should cover:

- Different planning tools and techniques such as use of SMART techniques, to prioritise and plan own workload as well as the use of, eg:
  - diaries
  - schedulers
  - planners
  - organisers/PDAs
  - timesheets
  - to do lists.

For assessment criterion 3.3, the candidate needs to explain why it is important to keep others informed about progress, in terms of eg

- meeting deadlines/targets
- accessing support when required
- to anticipate and plan for problems/delays
- the effect on colleagues' work loads/patterns.

Ways of progress reporting may be through, eg:

- regular progress reports
- one-to-one update meetings
- progress/team meetings
- shared project planners.

For assessment criterion 3.4, the candidate will need to describe the

- relationship between pressure and stress
- symptoms of not coping
- necessary action to take to reduce pressure and therefore avoid stress developing
- factors at work and at home that lead to stress.

For assessment criterion 4.1, candidates should cover:

- Benefits that result from continuously improving own performance in terms of, eg
  - improving weak areas and gaining new skills
  - motivation
  - increased ability to embrace changes/challenges
  - possible financial reward/promotion
  - increased employability.

For assessment criterion 4.2, candidates should cover:

- Methods of assessing own performance, eg SWOT analysis and training needs analysis (TNA), as well as observation and feedback, one-to-one meetings/appraisal and performance reviews, and how to create a Personal Development Plan using SMART techniques. Range of training and development opportunities:
  - coaching
  - mentoring
  - work-shadowing
  - training courses
  - in-house training
  - performance appraisals
  - e-learning.

For assessment criterion 4.3, the candidate needs to explain how feedback, both formal and informal, can result in personal growth and development, eg from

- managers/supervisors
- colleagues – 360°
- customers.



For assessment criterion 4.4, the candidate should explain career paths/progression routes available both inside and outside the organisation and the possible sources of information on these.

For assessment criterion 5.1, problems may be both

- minor, ie that can be solved by making adjustments and with little or no assistance;
- major, ie those that have resource or financial implications.

Types of problems eg:

- financial
- resource related
- equipment/systems failure
- staff-related
- unforeseen (weather, industrial action).

For assessment criterion 5.2, candidates should cover:

- Possible methods eg:
  - replanning/reprioritising own work
  - gaining the support of others
  - identifying a solution and implementing it.

For assessment criterion 5.3, the candidate should be able to explain how to assess a problem for seriousness in terms of impact on

- finance
- meeting target/deadline
- colleagues
- external customers/organisation's reputation
- security, health or safety.

The candidate should be able to explain the limits of their own authority in finding solutions to problems and procedures for referring problems, and to whom they should be referred.

For assessment criterion 6.1, the candidate should be able to explain key stages in the decision-making process, eg:

- analysis
- consultation
- negotiation
- feedback.

and show an awareness of who in an/their organisation has responsibility for different types of decisions, eg:

- strategic
- operational
- related to individual roles and responsibilities

They will also need to describe the factors that may affect decisions, eg

- sector regulations and codes of practice

- organisation size and structure
- organisational culture.

For assessment criterion 6.2, the candidate needs to explain their span of control and the impact of decisions on their role set colleagues. They should be able to identify decisions that are within and outside their limit of authority.

<b>UAN:</b>	K/502/9933
<b>Level:</b>	Level 3
<b>Credit value:</b>	5
<b>GLH:</b>	40
<b>Relationship to NOS:</b>	<p>This unit is linked to Council for Administration NOS</p> <p>Marketing 1.2.1 Define the need for market research</p> <p>Marketing 1.2.2 Design market research projects</p> <p>Marketing 1.2.4 Collect market research data</p> <p>Marketing 1.2.7 Collect data on the knowledge, attitude and behaviours of target groups</p>
<b>Assessment requirements specified by a sector or regulatory body:</b>	This unit is endorsed by the Council for Administration
<b>Aim:</b>	<p>This unit concerns understanding the basis on which market research is commissioned, how to design market research projects, the principles of marketing data collection and the principles of marketing data interpretation and evaluation</p>

<b>Learning outcome</b>	The learner will:
1.	Understand the basis on which market research is commissioned
<b>Assessment criteria</b>	
The learner can:	
1.1	Describe how to identify the need for market research and the <b>sources of evidence</b> to support this
1.2	Describe the basis for scoping the research and identifying linkages, interdependencies and the possible impact of one element on others
1.3	Explain how to set research parameters, aims and evaluation criteria
1.4	Explain the importance of involving stakeholders in the definition of research to be carried out
1.5	Explain how to evaluate <b>different options</b> for conducting the research

<b>Range</b>
<b>Sources of evidence</b> New product/service, new customer/stakeholder, competitors, feedback
<b>Different options</b> Primary, secondary

<b>Learning outcome</b>	The learner will:
2. Understand how to design market research projects	
<b>Assessment criteria</b>	
The learner can:	
2.1 Explain how to set research objectives, timescales, budget and resource requirements and success criteria	
2.2 Explain how to specify the characteristics and size of the sample to be researched in accordance with the research aims and objectives	
2.3 Describe the <b>factors</b> to be taken into account when selecting research instruments that are fit for purpose	
2.4 Explain how to ensure the suitability of methods chosen to conduct research	
2.5 Explain the strengths and limitations of quantitative and qualitative research	
2.6 Explain how <b>risks</b> inherent in market research may be addressed	
2.7 Explain how to ensure that research data collected is valid and reliable	
2.8 Describe the uses of the research outputs	
2.9 Explain how to obtain approval to the proposed research	

<b>Range</b>
<b>Factors</b> Cost, product, time, target audience, quantitative and qualitative data
<b>Risks</b> Inaccurate source data, breach of legislation, validity of data

<b>Learning outcome</b>	The learner will:
3. Understand the principles of marketing data collection	
<b>Assessment criteria</b>	
The learner can:	
3.1 Explain the difference between primary and secondary research and how this affects data collection methods and interpretation	
3.2 Describe the importance of using research instruments correctly	
3.3 Explain the role of data collection in a market research project	
3.4 Explain how to address problems arising in data collection (eg insufficiency of representative sample, unreliable or invalid data)	
3.5 Explain the importance of accurate data collection and recording	
3.6 Explain marketing data storage, security and access <b>requirements</b>	

<b>Range</b>
<b>Requirements</b> Data Protection Act, internal procedures eg passwords for computers, lockable cupboards

<b>Learning outcome</b>	The learner will:
4.	Understand the principles of marketing data interpretation and evaluation
<b>Assessment criteria</b>	
The learner can:	
4.1	Explain the volume of data needed to ensure statistical confidence
4.2	Explain how to evaluate the quality, reliability and validity of market research data
4.3	Describe the use(s) of market research
4.4	Explain the application, strengths and weaknesses of different <b>data analysis methods</b>
4.5	Explain the use of statistical tools to identify trends, causes and correlations in marketing data
4.6	Explain the strengths and weaknesses of different data <b>evaluation methods</b>
4.7	Explain the basis on which to reach conclusions as to the usefulness of the research

<b>Range</b>
<b>Data analysis methods</b> Data mining, business intelligence, statistical applications  <b>Evaluation methods</b> SWOT analysis

## **Unit 303**                      **Principles of market research**

### Supporting information

#### **Guidance**

For assessment criterion 2.1, candidates should know how to create a Gantt chart and have an awareness of budget constraints.

For assessment criterion 4.3, candidates should know the use(s) of collected market research

<b>UAN:</b>	F/502/9937
<b>Level:</b>	Level 3
<b>Credit value:</b>	7
<b>GLH:</b>	50
<b>Relationship to NOS:</b>	This unit is linked to the Council for Administration NOS Marketing 4.3.8 Market to target customers using digital/electronic media Marketing 4.3.9 Communicate using multiple digital marketing channels
<b>Assessment requirements specified by a sector or regulatory body:</b>	This unit is endorsed by the Council for Administration
<b>Aim:</b>	This unit concerns understanding the role and requirements of digital marketing, the principles of search engine optimisation (SEO), the principles of marketing research using the internet, the principles of digital marketing device and message design and how to use digital technology for marketing purposes

<b>Learning outcome</b>	The learner will:
1.	Understand the role and requirements of digital marketing
<b>Assessment criteria</b>	
The learner can:	
1.1	Explain the role of digital marketing within the overall marketing strategy
1.2	Explain the strengths and weaknesses of digital marketing for different <b>marketing applications</b>
1.3	Explain the importance of targeted digital marketing
1.4	Describe the sources of data lists for use in targeting customers and potential customers
1.5	Explain the legal requirements and implications of digital marketing
1.6	Describe the design requirements of <b>data capture</b> and reporting systems for digital marketing
1.7	Explain the importance of evaluating the impact of digital marketing activities

<b>Range</b>
<b>Marketing applications</b> Awareness campaigns, specific product/service campaigns, re-branding/re-positioning  <b>Data capture</b> should cover general and specific to digital marketing – age, gender, ethnicity, address, online behaviour and trends, incentives

<b>Learning outcome</b>	The learner will:
2.	Understand the principles of search engine optimisation (SEO)
<b>Assessment criteria</b>	
The learner can:	
2.1	Explain the importance of search engine optimisation
2.2	Describe how to <b>calculate</b> the cost-efficiency of SEO
2.3	Explain the use of Meta Tags, website codes and keywords
2.4	Explain the use of <b>offsite SEO</b> in optimising marketing effectiveness
2.5	Explain the design principles of response systems
2.6	Explain the advantages and disadvantages of links to other

<b>Range</b>
<b>Calculate</b> Analytic tools, budget  <b>Offsite SEO</b> Bigger/global market, data from wider internet, site ranking

<b>Learning outcome</b>	The learner will:
3.	Understand the principles of marketing research using the internet
<b>Assessment criteria</b>	
The learner can:	
3.1	Explain the scope for customising search-related internet facilities to enable the identification and retrieval of targeted information
3.2	Explain the advantages and disadvantages of different <b>data mining techniques</b>
3.3	Explain how to use multiple-table relational databases
3.4	Explain how to ensure the validity and reliability of information retrieved from the internet

<b>Range</b>
<b>Data mining techniques</b> Specific content, focused searching, relevant trusted sources, statistics, sampling, correlating information

<b>Learning outcome</b>	The learner will:
4.	Understand the principles of digital marketing device and message design



Assessment criteria	
The learner can:	
4.1	Explain the potential uses of a Customer Relationship Management (CRM) system
4.2	Explain the <b>design requirements</b> of a CRM system
4.3	Describe the characteristics of an effective digital <b>marketing device</b>
4.4	Describe the characteristics of an effective digital <b>response system</b>
4.5	Explain the requirements, advantages and disadvantages of different <b>tracking systems</b>
4.6	Explain how to overcome the barriers posed by <b>non-interoperable technologies</b>

Range
<p><b>Design requirements</b> Personal details, professional details, contact details, marketing activity, sector</p> <p><b>Marketing devices</b> Direct email, e-flyers, social networking groups</p> <p><b>Response systems</b> Questionnaires, competitions, promotions, vouchers</p> <p><b>Tracking systems</b> Open rates, click through rates, conversion rates</p> <p><b>Non-interoperable technologies</b> Non-compatible systems</p>

Learning outcome	The learner will:
5.	Understand how to use digital technology for marketing purposes
Assessment criteria	
The learner can:	
5.1	Explain the implications for the use of <b>digital technology</b> of campaigns that are aimed at retention, acquisition and conversion
5.2	Explain <b>methods</b> of managing digital databases including permission marketing and the application of suppressions/opt-outs
5.3	Explain the advantages and disadvantages of different <b>digital technologies</b> and combination of technologies for a range of <b>marketing applications</b>
5.4	Describe the characteristics of an effective digital marketing message
5.5	Explain the requirements of marketing to social networking sites in contrast to other targets

<b>Range</b>
<p><b>Digital technology</b> CRM systems, search engines, e-mail, social networks</p> <p><b>Methods</b> Opting in/opting out, legal aspects, data storage, encryption</p> <p><b>Digital technologies</b> CRM systems, search engines, e-mail, social networks</p> <p><b>Marketing applications</b> Awareness campaigns, specific product/service campaigns, re-branding/re-positioning</p>

## **Unit 304**                      **Principles of digital marketing and research**

### Supporting information

#### **Guidance**

For assessment criterion 2.5, design principles should be dependant on the campaign

For assessment criterion 5.5, candidates should compare social networking marketing to other marketing targets eg direct marketing, email, advertising.

<b>UAN:</b>	J/502/9938
<b>Level:</b>	Level 3
<b>Credit value:</b>	3
<b>GLH:</b>	16
<b>Relationship to NOS:</b>	<p>This unit is linked to Council for Administration NOS</p> <p>Marketing 2.1.4 Identify and manage relationships with social marketing stakeholders</p> <p>Marketing 4.1.1 Develop and understanding of the client</p> <p>Marketing 4.4.3 Build and manage stakeholder relationships</p> <p>Marketing 4.4.5 Manage business and political relationships and lobby for influence</p> <p>Marketing 4.4.6 Manage financial public relations and investor relations</p> <p>Marketing 7.3.3 Develop strategic relationships with major clients</p> <p>Marketing 7.4.4 Build and sustain collaborative relationships with other organisations (MSC D17)</p> <p>Marketing 7.1.6 Monitor and control relationship management activities</p>
<b>Assessment requirements specified by a sector or regulatory body:</b>	This unit is endorsed by the Council for Administration
<b>Aim:</b>	This unit concerns understanding marketing stakeholder relationships, how to build and manage marketing stakeholder relationships and how to monitor and control marketing stakeholder relationships

<b>Learning outcome</b>	The learner will:
1.	Understand marketing stakeholder relationships
<b>Assessment criteria</b>	
The learner can:	
1.1	Explain the basis on which the need for marketing <b>stakeholder</b> relationships are identified and prioritised
1.2	Explain the use of stakeholder mapping in developing ways of building relationships

- |     |   |
|-----|---|
| 1.3 | Describe the nature of interest of different stakeholder groups and how this affects the nature of relationships and communications |
| 1.4 | Explain the significance of stakeholders to the achievement of the overall marketing strategy                                       |
| 1.5 | Describe the <b>features</b> of the market in which stakeholders operate  |
| 1.6 | Describe how to establish stakeholders' attitudes to an organisation  |
| 1.7 | Describe actual and potential <b>synergies</b> and <b>conflicts</b> between clients and other stakeholders                          |

<b>Range</b>
--------------

<b>Stakeholders</b>
---------------------

Internal and external customers, investors, client, shareholders
--

<b>Features</b>
-----------------

Political, economic, social, technological, legal, ethical
--

<b>Conflict</b>
-----------------

Internal and external conflict
--------------------------------

<b>Synergies</b>
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Working in partnership
------------------------

<b>Learning outcome</b>	The learner will:
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- |   |
|---|
| 2. Understand how to build and manage marketing stakeholder relationships |
|---|

<b>Assessment criteria</b>
----------------------------

The learner can:
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- |  |
|--|
| 2.1 Explain how to identify common goals and potential synergy between stakeholders and an organisation  |
| 2.2 Explain the importance of engaging stakeholders in marketing activities  |
| 2.3 Explain the basis upon which stakeholder <b>communications plans</b> are developed   |
| 2.4 Explain the requirements of a competitor management strategy   |
| 2.5 Explain the importance of agreeing common objectives with clients  |
| 2.6 Describe the scope of generalist and specialist personnel that can be deployed in support of building long term relationships with clients |

<b>Range</b>
--------------

<b>Communication plans</b>
----------------------------

Service level agreements, frequency of updates
--

<b>Learning outcome</b>	The learner will:
-------------------------	-------------------

- |  |
|--|
| 3. Understand how to monitor and control marketing stakeholder relationships |
|--|

<b>Assessment criteria</b>
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The learner can:

- 3.1 Explain the use of key performance indicators and success criteria in monitoring the effectiveness of stakeholder relationships
- 3.2 Describe **methods** of monitoring the ongoing effectiveness of stakeholder relationships
- 3.3 Explain the importance of effective stakeholder communications and feedback system
- 3.4 Explain how changes in the **market environment** in which stakeholders operate may have an impact on relationships
- 3.5 Explain how to develop strategies and plans that address changing stakeholder attitudes and needs
- 3.6 Explain how to develop **reporting systems** that meet agreed success criteria
- 3.7 Explain the importance of reviewing the effectiveness of collaborative arrangements with stakeholders

<b>Range</b>
<b>Methods</b> Survey, annual review, ad-hoc contact, account management
<b>Market environment</b> Political, economic, social, technological, ethical, legal, competitors
<b>Reporting systems</b> CRM system, internal communication (verbal/non-verbal)

**Guidance**

For assessment criterion 1.2, stakeholder mapping is referring to a tool to analyse the relationship between stakeholders eg areas of communality between stakeholders.

For assessment criterion 2.6, candidates should know the structure of a marketing department and the individual roles and responsibilities

For assessment criterion 3.5, candidates should consider the impact of the changes in market environment in AC 3.4

## Unit 306

## Understanding the relationship between sales and marketing

<b>UAN:</b>	F/502/8223
<b>Level:</b>	Level 3
<b>Credit value:</b>	3
<b>GLH:</b>	21
<b>Relationship to NOS:</b>	This unit is linked to Council for Administration NOS Sales 3-8 Sales 3-20 Marketing NOS 7.4.2
<b>Assessment requirements specified by a sector or regulatory body:</b>	This unit is endorsed by the Council for Administration
<b>Aim:</b>	This unit concerns understanding the impact of different organisational structures on sales and marketing functions, the interface between sales and marketing functions and product development processes

<b>Learning outcome</b>	The learner will:
1.	Understand the impact of different organisational structures on sales and marketing functions
<b>Assessment criteria</b>	
The learner can:	
1.1	Describe the features of different <b>organisational structures</b>
1.2	Explain the effect of different <b>organisational structures</b> on sales and marketing functions and their performance

<b>Range</b>
<b>Organisational structures</b> Small, medium and large

<b>Learning outcome</b>	The learner will:
2.	Understand the interface between sales and marketing functions
<b>Assessment criteria</b>	
The learner can:	
2.1	Explain the role and responsibilities of sales personnel
2.2	Explain the role and responsibilities of marketing personnel



2.3	Describe areas of synergy between the sales and marketing functions
2.4	Describe the benefits of collaborative working to the performance of an organisation
2.5	Explain potential causes of friction between the sales and marketing functions
2.6	Describe mutually acceptable solutions to identified sources of friction

<b>Learning outcome</b>	The learner will:
3.	Understand the impact of sales and marketing on product development processes
<b>Assessment criteria</b>	
The learner can:	
3.1	Describe the product development process
3.2	Explain the role of sales and marketing in the <b>product development process</b>
3.3	Explain the market features and trends relating to a product or service
3.4	Describe the characteristics and benefits of a product or service
3.5	Explain the wants and needs of an organisation's customer base
3.6	Describe how to prepare a <b>business case</b> for a product or service
3.7	Describe how to forecast sales of a product or service
3.8	Explain the importance and use of <b>customer feedback</b> in relation to product development

<b>Range</b>
<b>Product development process</b> Customer feedback, research, development, trial, marketing  <b>Business case</b> Formal, informal  <b>Customer feedback</b> Formal, informal

## Unit 306

## Understanding the relationship between sales and marketing

### Supporting information

#### Guidance

For assessment criterion 1.1, the features of each structure must be described.

For assessment criterion 1.2, the effect of different structures on sales and marketing must be explained

For assessment criterion 2.1, the candidate must identify at least four roles within sales and the responsibilities

For assessment criterion 2.2, the candidate must identify at least four roles within marketing and the responsibilities

For assessment criterion 2.3, synergy is where there is co-operation from others to achieve an objective which could not be achieved independently

For assessment criterion 2.4, collaborative working is working together on a project/activity



## Appendix 1 Relationships to other qualifications

### Links to other qualifications

Mapping is provided as guidance and suggests areas of commonality between the qualifications. It does not imply that candidates completing units in one qualification have automatically covered all of the content of another.

Centres are responsible for checking the different requirements of all qualifications they are delivering and ensuring that candidates meet requirements of all units/qualifications.

This qualification has connections to the:

- new Level 2 & 3 Certificates in Principles of Sales (7711)
- new Level 2 & 3 NVQ in Sales (6801)
- new Level 2 & 3 NVQ in Marketing (7712)
- new 4430 & 4417 in Customer Service
- new 3412 in Contact Centres

### Literacy, language, numeracy and ICT skills development

This qualification can develop skills that can be used in the following qualifications:

- Functional Skills (England) – see **[www.cityandguilds.com/functionalskills](http://www.cityandguilds.com/functionalskills)**
- Essential Skills (Northern Ireland) – see **[www.cityandguilds.com/essentialskillsni](http://www.cityandguilds.com/essentialskillsni)**
- Essential Skills Wales (from September 2010).



## Appendix 2 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on **[www.cityandguilds.com](http://www.cityandguilds.com)**.

***Providing City & Guilds qualifications – a guide to centre and qualification approval*** contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

***Ensuring quality*** contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

***Access to Assessment & Qualifications*** provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- **Walled Garden:** how to register and certificate candidates on line
- **Qualifications and Credit Framework (QCF):** general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs
- **Events:** dates and information on the latest Centre events
- **Online assessment:** how to register for GOLA assessments.

## Useful contacts

<b>UK learners</b> General qualification information	T: +44 (0)844 543 0033 E: <b>learnersupport@cityandguilds.com</b>
<b>International learners</b> General qualification information	T: +44 (0)844 543 0033 F: +44 (0)20 7294 2413 E: <b>intcg@cityandguilds.com</b>
<b>Centres</b> Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: <b>centresupport@cityandguilds.com</b>
<b>Single subject qualifications</b> Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: <b>singlesubjects@cityandguilds.com</b>
<b>International awards</b> Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: <b>intops@cityandguilds.com</b>
<b>Walled Garden</b> Re-issue of password or username, Technical problems, Entries, Results, GOLLA, Navigation, User/menu option, Problems	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: <b>walledgarden@cityandguilds.com</b>
<b>Employer</b> Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	T: +44 (0)121 503 8993 E: <b>business_unit@cityandguilds.com</b>
<b>Publications</b> Logbooks, Centre documents, Forms, Free literature	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413

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## **City & Guilds**

**1 Giltspur Street**

**London EC1A 9DD**

**T +44 (0)844 543 0000**

**F +44 (0)20 7294 2413**

**[www.cityandguilds.com](http://www.cityandguilds.com)**

**WW-02-7734**