



Equivalent QCF level:	Level 7
Credit Value:	15
Learning time (hours):	150

## UNIT PURPOSE

To provide learners with an understanding of the critical role of strategic marketing management and planning in evaluating an organisation's current position in its markets, and to identify potential threats and opportunities to its business. The unit then provides a range of tools and techniques to aid marketing planning and campaigns, including the identification of new products/services and their marketing.

## UNIT INTRODUCTION

The unit has two themes: firstly the critical understanding of the practical tools, techniques, operations and activities of the marketing process, and secondly the marketing decisions on which effective marketing management and planning are based. These two themes divide the operational marketing activities from the management decisions, and learners will develop diagnostic skills in both themes of the unit so that they become familiar with processes related to marketing activities and communications. Finally, learners will be able to link external or environmental market dynamics with organisational responses. Learners will be able to reflect through their application of the tools and techniques covered to service/product-market relationships and customer/client behaviours.



To pass this unit, the learner must generate evidence that demonstrates all learning outcomes have been met through the achievement of all the unit's assessment criteria.

Learning outcomes On completion of this unit, the learner will:		Assessment criteria On completion of this unit, the learner can:	Content
01	Be able to appraise marketing opportunities in an organisation	1.1 Conduct a situational market analysis for a given organisation  1.2 Identify opportunities and threats for a given organisation's market  1.3 Relate identified opportunities and threats to the organisation's strategic objectives and competitive position	<p><b>Models and tools to evaluate opportunities:</b> organisation, industry and market environment situational analysis; Porter's Five Forces Industry Analysis: The threat of new entrants, Bargaining power of buyers, Threat of substitutes, Bargaining powers of suppliers, Competitor Rivalry; PESTEL analysis; SWOT analysis</p> <p><b>Portfolio analysis:</b> BCG matrix, Ansoff matrix, product life cycle models, six markets model (internal, supplier, recruitment, referral, influence, customer)</p> <p><b>Relationship marketing:</b> direct response strategies; increasing customer purchases, obtaining new customers, increasing customer satisfaction, cross-selling</p>



<p><b>02</b></p>	<p>Be able to construct the framework for an integrated strategic marketing plan for an organisation</p>	<p>2.1 Assess the value of models used in strategic marketing planning and communications</p> <p>2.2 Construct a detailed framework of activities for an integrated marketing plan for a chosen organisation</p> <p>2.3 Evaluate the constructed plan for a chosen organisation</p>	<p><b><i>Role of strategic marketing, marketing communications, strategic marketing planning processes:</i></b> strategic marketing analysis, strategy, objective setting, option evaluation, sequencing, scheduling and control of activities, use of MIS, CRM and e-marketing tools</p> <p><b><i>Linking strategic positioning to marketing tactics:</i></b> identifying desired future position, data collection and analysis, market penetration, market and product development, product life cycles, demand pull versus supply push approaches</p>
<p><b>03</b></p>	<p>Be able to design and evaluate a marketing campaign and incorporate new and innovative concepts and techniques</p>	<p>3.1 Discuss the advantages and disadvantages of various campaign channels and techniques</p> <p>3.2 Construct a detailed marketing campaign plan for an organisation, justifying your choices of channels and techniques</p> <p>3.3 Produce costing and targets for your campaign activities while considering:</p> <ul style="list-style-type: none"> <li>• evaluation of the effectiveness of the campaign in meeting SMART objectives</li> </ul>	<p><b><i>Marketing communications theory and planning, legal and ethical issues</i></b></p> <p><b><i>Promotional mix:</i></b> advertising, personal selling, sales promotion, public relations, direct marketing, corporate image</p> <p><b><i>Means of advertising:</i></b> price advertising, image advertising, local service advertising, business-to-business advertising, direct response advertising</p> <p><b><i>New Media:</i></b> blogs, podcasts, message boards, product reviews, Wikipedia, social networks, mobiles</p>



			<p><b>Modern campaign methods:</b> guerrilla advertising, product placement, mobile advertising, web banner, bandwagon, testimonials and endorsements, surrogate advertising, blogs</p>
04	<p>Be able to apply appropriate tools and techniques to develop marketing plans for new customer product or service</p>	<p>2.1 Propose a new product or service for a named organisation and consider the appropriateness of various market testing and selection techniques</p> <p>2.2 Produce a marketing plan for the new product/service above</p>	<p><b>Identification and selection of new product/service ideas:</b> brainstorming, costing, test marketing, revenue forecasts, feasibility study, cost-benefit analysis, BCG and Ansoff matrix, gap analysis, value chain analysis</p> <p><b>Corporate governance and business ethics:</b> CSR, structures, rights, duties, and obligations</p>



## DELIVERY & ASSESSMENT

Tuition and guidance should adopt flexible approaches to delivering the unit. Formal tuition sessions will have input from a tutor to identify some of the theoretical subject matter and learners can work individually and in a group researching and gathering information about the subject. Research, case studies, simulations and discussion are engaging ways of learning about the subject. Learners can use self-directed study and reflect on their experience and expertise. Up-to-date information and materials are available from many sources such as businesses, the world wide web, television and radio broadcasts, broadsheet newspapers and advisory services.

In order to pass this unit, the evidence that the learners present for assessment must demonstrate that they have met the required standard specified in the assessment criteria. Centres will devise and mark the assessments for the unit and learners must meet all assessment criteria to pass the unit.

A range of assignments types can be used such as reports, proposals, plans, presentations, articles, case studies, exercises, simulations, a learning journal and practical work. All assessment methods are acceptable provided the assessment enables the learners to produce evidence that can be judged against the assessment criteria.

Learning outcome 1 requires learners to select a market sector and to evaluate the marketing opportunities it offers by conducting a situational analysis, using appropriate tools to consider both internal business factors and external market factors.

Learning outcomes 2, 3 and 4 require learners to make marketing plans. The plans could be for a product or service to be offered to the market identified in outcome 1. Initially a strategic framework would be required before considering how to produce a campaign and marketing plans to promote the product or service to new and/or existing markets. It is expected that learners would be able to recognise how and why businesses source and utilise customer data to promote and target their products and services to specific markets and individuals, using both traditional techniques, and/or communications technologies. In addition learners need to demonstrate the feasibility and practicality of their plans by producing revenue forecasts and cost analyses, and by showing how they have taken account of the requirement for businesses to act in socially responsible and sustainable ways when marketing their products and services.

For some learners, assessment criteria can be met through recognition of prior learning (RPL) which will enable them to present evidence to show that they can attain the assessment requirements of the unit through knowledge, understanding or competence they already possess.

If a learning journal is used then the narratives in it can be mapped to assessment criteria and used as evidence for the demonstration of relevant assessment criteria.

It is possible to assess work using professional discussions, with learners explaining and describing things to the assessor either on a one-to-one basis or in group work or in a presentation. Similarly, questioning can be used to provide evidence of knowledge. If these types of assessment are used then the work must be directly attributable to the learner.

Assessment can be for individual learning outcomes, for groups of learning outcomes within a unit and can be combined with the assessment of outcomes and criteria from other units. This latter would require an assessment map to identify where outcomes and criteria are assessed.



## OUTLINE LEARNING PLAN

The following outlined learning plan can be used as a guidance document in conjunction with the unit assessment. It is simply a way in which this unit can be delivered.

### TOPIC AND SUGGESTED ASSIGNMENTS/ACTIVITIES/ASSESSMENT

Introduction to unit and programme of learning
Presentation on evaluating markets and marketing opportunities
Practical work, research and discussion on evaluating markets and marketing opportunities
Assignment 1. Marketing plan, appendices and supporting information
Presentation on strategic marketing models and frameworks
Practical work, research and discussion on strategic marketing models and frameworks
Tutorial support for assignment 1
Presentation on designing marketing campaigns
Practical work, research and discussion on designing marketing campaigns
Practical work on assignment 1
Tutorial support and feedback for assignment 1
Review of unit and programme of assignments

### PROGRAMME OF SUGGESTED ASSESSMENT/ASSIGNMENTS

The following table illustrates the respective assessments for the unit and identifies the corresponding assessment criteria.

Assessment Criteria covered	Assignment title	Scenario	Assessment method
1.1, 1.2, 1.3 2.1, 2.2, 2.3 3.1, 3.2, 3.3 4.1, 4.2	Assignment 1	You have been asked to advise an expanding business on how it could develop its marketing strategy and the associated activities in promoting its expanding range of products and after-market services to both new and existing markets	Marketing plan, appendices and supporting information



## PROGRAMME OF SUGGESTED ASSESSMENT/ASSIGNMENTS

Assessment Criteria covered	Assignment title	Scenario	Assessment method
1.1, 1.2, 1.3 2.1, 2.2, 2.3 3.1, 3.2, 3.3 4.1, 4.2	Assignment 1– Cont.	<p>An initial development has been sanctioned by the directors to expand the current market for the business' products and services from a regional to a national one. The directors understand the importance of effective marketing and as they develop the business' expertise in this area they have commissioned you to advise them and to develop the business' marketing as it seeks to develop its markets. The advice you prepare for the marketing framework and plan is in stages</p> <p>Stage 1 Prepare an evaluation of marketing opportunities based upon an analysis of the marketing environment</p> <p>Stage 2 Produce a framework for an integrated strategic marketing plan with a justification and evaluation of its suitability for the business, its products/services and its proposed new markets</p> <p>Stage 3 Plan a marketing campaign with a supporting rationale and financial analyses</p>	Marketing plan, appendices and supporting information



## PROGRAMME OF SUGGESTED ASSESSMENT/ASSIGNMENTS

Assessment Criteria covered	Assignment title	Scenario	Assessment method
1.1, 1.2, 1.3 2.1, 2.2, 2.3 3.1, 3.2, 3.3 4.1, 4.2	Assignment 1 – Cont.	<p>Stage 4</p> <p>Prepare a marketing plan for the business, applying appropriate tools and techniques, to launch its products/services into its proposed new markets</p> <p>Additional guidance</p> <p>Tutors should provide the case study or select the business ensuring that learners have sufficient stimulus materials. For example, a regional food producer might want to market its products to other parts of the United Kingdom. Alternatively a computer games maker may wish to develop learning software for young children and to produce devices that run the games to appeal to young children</p>	Marketing plan, appendices and supporting information



## TEXTBOOKS

- Aaker D., (2005) Strategic Market Management (7th Ed.) John Wiley, Chichester
- Kotler, P , Chernev, A (2012) Strategic Marketing Management (7th Ed.), Cerebellum Press
- McDonald, M. H. (2011) Marketing Plans: How to Prepare Them, How to Use Them (7th Ed) John Wiley, Chichester
- Piercy, N.F. (2008) Market led Strategic Change – Transforming the process of going to Market (4th Ed.). Butterworth-Heinemann
- Doyle P., (2008) Value Based Marketing (2nd Ed.) , John Wiley and Sons Chichester
- Fill, C, Marketing Communications: Interactivity, Communities and Content (5<sup>th</sup> Ed.) 2009, Pearson: Harlow

## JOURNALS

- Journal of Marketing Management
- Journal of Strategic Marketing
- Journal of Management and Strategy

## WEBSITES

Chartered Institute of Marketing	<a href="http://www.cim.co.uk/cim/index.cfm">http://www.cim.co.uk/cim/index.cfm</a>
CIM marketing communications guide	<a href="http://www.cim.co.uk/files/marcomms.pdf">www.cim.co.uk/files/marcomms.pdf</a>
Advertising Standards Authority	<a href="http://www.asa.org.uk/">http://www.asa.org.uk/</a>
Chartered Institute of Public Relations	<a href="http://www.cipr.co.uk/">http://www.cipr.co.uk/</a>
Design Council	<a href="http://www.designcouncil.org.uk">http://www.designcouncil.org.uk</a>