

Level 2 Certificate in Principles of Marketing (7734-02)

October 2017
Version 1.6



Qualification at a glance

Subject area	Marketing
City & Guilds number	7734
Age group approved	14+
Entry requirements	No specific entry requirements
Assessment	Assignment per unit
Automatic approval	Available
Support materials	Qualification handbook Short answer questions Sample paper
Registration and certification	See Walled Garden/Online Catalogue for last dates

Title and level	GLH	TQT	City & Guilds number	Accreditation number
Level 2 Certificate in Principles of Marketing	116	150	7734-02	600/0928/7

Version and date	Change detail	Section
Version 1.6 (October 2017)	Added GLH and TQT details Removed QCF	Qualification at a glance and Introduction Summary of Units, Appendix 2 and Title of handbook
Version 1.5 (August 2013)	Amended support material details	Support materials (page 7)
Version 1.4 (April 2013)	Amended assessment types	Assessment (page 8)



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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?	It 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?	It serves as a technical certificate, in the Marketing Apprenticeship framework.
Who did we develop the qualification with?	It was developed in association with the Council for Administration
What opportunities for progression are there?	It allows candidates to progress into employment or to the following City & Guilds qualifications: <ul style="list-style-type: none">• Level 3 Certificate in Principles of Marketing (7734-03)• Level 2/3 NVQ Certificate/Diploma in Marketing (7712-02/03/04)• Level 2/3 NVQ Certificate/Diploma in Sales (6801-01/02/03/04)• Level 2/3 Certificate in Principles of Sales (7711-02/03)• Level 2/3 NVQ Certificate/Diploma in Business and Administration (4428-02/03)• Level 2/3 Certificate in Principles of Business and Administration (4475-02/03)

Structure

To achieve the **Level 2 Certificate in Principles of Marketing**, learners must achieve 10 credits from the mandatory units and a minimum of 5 credits from the optional units available.

Unit accreditation number	City & Guilds unit number	Unit title	Credit value
Mandatory			
D/502/9928	201	Principles of marketing theory	4
F/502/8206	202	Understanding legal, regulatory and ethical requirements in sales or marketing	2
L/601/7638	203	Principles of personal responsibilities and working in a business environment	4
Optional			
K/503/8194	204	Principles of customer relationships	3
D/502/9931	205	Principles of digital marketing	5
K/502/9933	303	Principles of market research	5
F/502/8223	306	Understanding the relationship between sales and marketing	3

Total Qualification Time

Total Qualification Time (TQT) is the total amount of time, in hours, expected to be spent by a Learner to achieve a qualification. It includes both guided learning hours (which are listed separately) and hours spent in preparation, study and assessment.

Title and level	GLH	TQT
Level 2 Certificate in Principles of Marketing	116	150



2 Centre requirements

Approval

To offer this qualification, centres will need to gain both centre and qualification approval. Please refer to the *Centre Manual - Supporting Customer Excellence* 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

There is no age restriction for this qualification unless this is a legal requirement of the process or the environment.



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, 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
Task based assignments	City & Guilds website
Short answer questions	City & Guilds website
FAQs	City & Guilds website



4 Assessment

Assessment of the qualification

Candidates must successfully complete

- successfully complete one short-answer test **or** task based assignment for each mandatory unit and optional unit chosen

The following units are assessed by short answer test;

- 202
- 203
- 302
- 306

The following units are assessed by task based assignment;

- 201
- 204
- 205
- 301
- 303
- 304
- 305

Test Specifications

Test 1: Unit 202

Unit	Outcome	Number of questions	Weighting %
202	1 Understand an organisation's procedures for dealing with legal, regulatory and ethical requirements relating to sales or marketing	7	47
	2 Understand the legal, regulatory and ethical limits of the sales or marketing role	8	53
Total		15	100

Test 2: Unit 203

Unit	Outcome	Number of questions	Weighting %
203	1 Know the employment rights and responsibilities of the employee and employer	7	24
	2 Understand the purpose of health, safety and security procedures in a business environment	4	13
	3 Understand how to communicate effectively with others	4	13
	4 Understand how to work with and support colleagues	4	13
	5 Know how to plan own work and be accountable to others	4	10
	6 Understand the purpose of improving own performance in a business environment and how to do so	3	10
	7 Understand the types of problems that may occur in a business environment and how to deal with them	4	17
	Total	30	100

Test 2: Unit 302

Unit	Outcome	Number of questions	Weighting %
302	1 Understand the employment rights and responsibilities of the employee and employer and their purpose	8	32
	2 Understand the purpose of health, safety and security procedures in a business environment	3	12
	3 Understand how to manage own work	5	20
	4 Understand how to evaluate and improve own performance in a business environment	4	16
	5 Understand the types of problems that may occur with own work and how to deal with them	3	12
	6 Understand the decision making process	2	8
	Total	25	100

Test 3: Unit 306

Unit	Outcome	Number of questions	Weighting %
306	1 Understand the impact of different organisational structures on sales and marketing functions	2	10
	2 Understand the interface between sales and marketing functions	7	35
	3 Understand the impact on product development processes	11	55
Total		20	100

Grading and marking

- The short-answer test cover underpinning knowledge
- The assignment cover underpinning knowledge
- All short-answer tests are internally marked and graded subject to internal and external moderation
- All assignments are internally marked and graded subject to internal and external moderation
- The short-answer tests are graded pass/ fail
- The assignments are graded pass/ fail
- Detailed marking criteria are provided in the marking guide for each short-answer test and assignment.

Please also refer to the assessment 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	Unit number (UAN)
201	Principles of marketing theory	4	D/502/9928
202	Understanding legal, regulatory and ethical requirements in sales or marketing	2	F/502/8206
203	Principles of personal responsibilities and working in a business environment	4	L/601/7638
204	Principles of customer relationships	3	Y/502/9930
205	Principles of digital marketing	5	K/503/8194
303	Principles of market research	5	K/502/9933
306	Understanding the relationship between sales and marketing	3	F/502/8223

UAN:	D/502/9928
Level:	Level 2
Credit value:	4
GLH:	30
Relationship to NOS:	<p>This unit is linked to Council for Administration NOS</p> <p>Marketing 1.2.7 Collect data on the knowledge, attitudes and behaviours of target groups</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>Marketing 2.1.3 Demonstrate the value of marketing to the organisation</p> <p>Marketing 4.1.3 Manage communications for social marketing programmes</p>
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration
Aim:	This unit concerns understanding how to segment the market, the value of marketing and the principles of socially responsible marketing

Learning outcome	The learner will:
1.	Understand how to segment the market
Assessment criteria	
The learner can:	
1.1	Explain the importance of defining market segments
1.2	Describe the difference between market segments and customer classifications
1.3	Explain how to cluster customers with similar characteristics
1.4	Describe how a range of products may appeal to different market segments
1.5	Describe the importance of valid and reliable marketing data to segmenting the market
1.6	Explain the strengths and weaknesses of different marketing data collection methods
1.7	Describe the use of Customer Relationship Management (CRM) activities and systems

Range
<p>Market segments Age, gender, religion, culture, income, lifestyle</p> <p>Customer classifications Business customers, leisure customers</p> <p>Data collection methods Primary, secondary</p>

Learning outcome	The learner will:
2.	Understand the value of marketing
Assessment criteria	
The learner can:	
2.1	Describe the role of marketing in enhancing the sale of products and/or services
2.2	Explain the significance of customer loyalty to the achievement of marketing objectives
2.3	Explain the role of performance indicators and evaluation arrangements
2.4	Describe the factors to be taken into account when assessing the cost and value of marketing activities
2.5	Explain the significance of brand and reputation to sales performance

Range
<p>Factors Target audience, marketing mediums, timeframes, budget</p>

Learning outcome	The learner will:
3.	Understand the principles of socially responsible marketing
Assessment criteria	
The learner can:	
3.1	Explain the scope and purpose of socially responsible marketing
3.2	Explain the importance of involving stakeholders in socially responsible marketing activities
3.3	Explain how core values are expressed through coherent branding and chosen communication methods
3.4	Explain the requirements of socially responsible marketing campaigns

Range**Socially responsible marketing**

Ethical, eg smoking, health (sexual health, pregnancy, alcohol), education
Corporate social responsibility, eg diversity, community responsibility,
volunteering, mentoring

Stakeholders

Internal and external customers, investors, client, shareholders

Branding

Logo, campaign name, key message, design, recognition

Unit 201 Principles of marketing theory

Supporting information

Guidance

For assessment criterion 1.4, candidates should cover at least 3 products.

For assessment criterion 1.7, CRM should be relative to an organisation either through work experience or research.

For assessment criterion 3.3, candidates should consider an organisation's core values and/or the core values of a campaign.

Candidates should have knowledge of marketing plans to help achieve this unit.

Unit 202

Understanding legal, regulatory and ethical requirements in sales or marketing

UAN:	F/502/8206
Level:	Level 2
Credit value:	2
GLH:	15
Relationship to NOS:	This unit is linked to Council for Administration NOS SLS 77
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration.
Aim:	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

Learning outcome	The learner will:
1.	Understand an organisation's procedures for dealing with legal, regulatory and ethical requirements relating to sales or marketing
Assessment criteria	
The learner can:	
1.1	Describe an organisation's procedures for raising legal, regulatory and ethical concerns
1.2	Explain the scope of legal, regulatory and ethical requirements in sales or marketing
1.3	Explain how the legal, regulatory and ethical requirements relate to the business of selling or marketing
1.4	Describe internal and external 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

Range
Scope 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

Learning outcome	The learner will:
2.	Understand the legal, regulatory and ethical limits of the sales or marketing role
Assessment criteria	
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 legal, regulatory or ethical requirements
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.

Unit 203

Principles of personal responsibilities and working in a business environment

UAN:	L/601/7638
Level:	Level 2
Credit value:	4
GLH:	32
Relationship to NOS:	This unit is linked to Council for Administration NOS BAA231; BAF172.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration
Aim:	This unit concerns understanding employment rights; health, safety and security; how to work with others and how to manage and improve own work in a business environment

Learning outcome	The learner will:
1. Know the employment rights and responsibilities of the employee and employer	
Assessment criteria	
The learner can:	
1.1 Identify the main points of contracts of employment	
1.2 Identify the main points of legislation affecting employers and employees	
1.3 Identify where to find information on employment rights and responsibilities both internally and externally	
1.4 Describe how representative bodies can support the employee	
1.5 Identify 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	

Learning outcome	The learner will:
2.	Understand the purpose of health, safety and security procedures in a business environment
Assessment criteria	
The learner can:	
2.1	Identify employer and employee responsibilities for health, safety and security procedures in a business environment
2.2	Explain the purpose of following health, safety and security procedures in a business environment
2.3	Identify ways of maintaining a safe and secure environment in a business environment

Range
<p>Employer and employee responsibilities:</p> <ul style="list-style-type: none"> • complying with health and safety legislation (as in learning outcome 1) • risk assessment • role and duties of a first-aider or appointed person • environmental issues such as heating, lighting, ergonomics, ventilation, décor • emergency and evacuation procedures • security and confidentiality of data • health and safety training. <p>Purpose of procedures covering:</p> <ul style="list-style-type: none"> • 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. <p>Maintaining a safe and secure environment:</p> <ul style="list-style-type: none"> • following the requirements of the health and safety in a business environment act 1974 • following specific legislation covering job roles • identifying hazards and risks; risks resulting from: <ul style="list-style-type: none"> a) the use and maintenance of machinery or equipment b) the use of materials or substances c) working practices d) unsafe behaviour e) accidental breakages and spillages f) environmental factors. • the responsible persons to whom to report health and safety matters • responsibilities and specific workplace policies covering job roles.

Learning outcome	The learner will:
3. Understand how to communicate effectively with others	
Assessment criteria	
The learner can:	
3.1 Describe different methods of communication	
3.2 Explain how to choose the most appropriate method of communicating with others	
3.3 Describe ways of actively listening	

Range
<p>Both formally and informally, internal and external:</p> <ul style="list-style-type: none"> • written eg letters, memos, reports • face-to-face eg one-to-one, meetings, presentations • electronically eg fax, email, telephone • non-verbally eg body language, gestures. <p>Method of communication In terms of:</p> <ul style="list-style-type: none"> • formality • speed • confidentiality • cost. <p>Active listening eg:</p> <ul style="list-style-type: none"> • making eye contact • using positive body language • using encouraging phrases • not interrupting • questioning and paraphrasing • summarising

Learning outcome	The learner will:
4. Understand how to work with and support colleagues	
Assessment criteria	
The learner can:	
4.1 Explain the purpose of agreeing standards for own work with others	
4.2 Explain the purpose of taking on new challenges and adapting to change	
4.3 Explain the purpose of treating others with honesty and consideration	

<p>Range</p> <p>Agreeing standards in terms of, eg:</p> <ul style="list-style-type: none"> • deadlines • quality of work • type/scope of work • available resources/support. <p>The candidate should be able to explain the importance of gaining full information in order to complete work efficiently, accurately and to deadline.</p> <p>Benefits that result from taking on new challenges and being adaptable, eg:</p> <ul style="list-style-type: none"> • possible financial reward/promotion • opportunity to gain new skills • motivational • new experiences build confidence • may increase employability. <p>How to create and maintain a good working relationship with others eg:</p> <ul style="list-style-type: none"> • communicate • support • co-operate • empathise • be loyal. <p>The purpose of good working relationships in terms of eg:</p> <ul style="list-style-type: none"> • meeting deadlines and targets • motivation • sharing workloads • support and advice.

Learning outcome	The learner will:
5.	Know how to plan own work and be accountable to others
Assessment criteria	
The learner can:	
5.1	Explain the purpose of meeting work standards and deadlines when completing tasks
5.2	Identify ways of planning own work
5.3	Compare ways of keeping other people informed about progress

Range
<p>The importance of having a flexible approach to work requirements and knowing how to prioritise and plan pieces of work according to their urgency eg using SMART objectives. The candidate should be able to describe circumstances when deadlines cannot be met through, eg:</p> <ul style="list-style-type: none"> • interruptions • distractions • taking on extra work • staff absence • technical breakdown • unforeseen circumstances such as inclement weather, transport strikes. <p>The candidate should be aware of the impact of not meeting deadlines on:</p> <ul style="list-style-type: none"> • their colleagues • their manager/supervisor • the organisation as a whole. <p>Techniques to prioritise and plan own workload, eg:</p> <ul style="list-style-type: none"> • diaries • schedulers • planners • organisers/PDAs • timesheets • to do lists. <p>Ways of progress reporting may be through, eg:</p> <ul style="list-style-type: none"> • regular progress reports • one-to-one update meetings • progress/team meetings • shared project planners. • <p>The candidate should be able to state advantages/disadvantages of different ways and when they would be most appropriate to use.</p>

Learning outcome	The learner will:
6.	Understand the purpose of improving own performance in a business environment and how to do so
Assessment criteria	
The learner can:	
6.1	Explain the purpose of continuously improving own performance in a business environment
6.2	Describe ways of improving own performance in a business environment
6.3	Identify different types of career pathways that are available

<p>Range</p> <p>Benefits that result from continuously improving own performance, eg</p> <ul style="list-style-type: none"> • opportunity to improve weaknesses and gain new skills • motivational • increased ability to embrace changes/challenges • possible financial reward/promotion • increased employability. <p>Methods of assessing own performance, eg SWOT analysis; how observation and feedback, training needs analyses (TNA), one-to-one meetings/ appraisal and performance reviews can all feed into a Personal Development Plan. The candidate should be able to explain the purpose of using SMART techniques when creating such a plan.</p> <p>The candidate should be able to identify a range of training and development opportunities to assist in improving own performance:</p> <ul style="list-style-type: none"> • coaching • mentoring • work-shadowing • training courses • in-house training • performance appraisals • e-learning. <p>Career paths/progression routes available both inside and outside the organisation and the possible sources of information on these.</p>

Learning outcome	The learner will:
7.	Understand the types of problems that may occur in a business environment and how to deal with them
Assessment criteria	
The learner can:	
7.1	Identify the types of problems that may occur in a business environment
7.2	Explain ways of dealing with problems that may occur in a business environment
7.3	Explain how and when to refer problems to relevant colleagues

Range

Problems may be

- 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).

Possible methods could be, eg:

- replanning/reprioritising own work
- gaining the support of others
- identifying a solution and seeking permission to implement it
- referring the problem on.

Problem should be referred if, eg

- the solution will cost money or affect many others
- it will impact seriously on the overall target/deadline
- there is no apparent solution
- there is a security, health or safety risk
- the solution is outside the candidate's scope of authority.

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

Unit 203 Principles of personal responsibilities and working in a business environment

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.

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
 - Employment Relations Act
 - Working Time Regulations
 - Employment Act
- Health and safety legislation, eg:
 - Health and Safety at Work Act
 - Reporting of Injuries, Disease and Dangerous Occurrences Regulations (RIDDOR)
 - The Management of Health and Safety in a business environment Regulations
 - Workplace (Health, Safety and Welfare) Regulations
 - Display Screen Equipment Regulations
 - The Provision and Use of Work Equipment Regulations
 - Control of Substances Hazardous to Health (COSHH)
- Data and intellectual property protection :
 - The Data Protection Act
 - The Copyright, Designs and Patents Act
- Company legislation, eg:
 - Companies Act

For assessment criterion 1.3, candidates should cover:

- Sources of information:
 - Internal eg line manager, HR/personnel department, union representative, intranet.
 - External 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.
- Support in terms of
 - advice
 - information
 - legal assistance
 - financial help.

For assessment criterion 1.5, candidates should cover:

- Employer and employee responsibilities for equality and diversity:
 - 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. Benefits could include:

- 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.

Unit 204

Principles of customer relationships

UAN:	Y/502/9930
Level:	Level 2
Credit value:	3
GLH:	18
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 7.1.2 Build and deliver customer service and customer care support Marketing 7.1.3 Build and retain effective sales relationships Marketing 7.1.4 Assist in the development of sales support and customer management programmes ICS unit D1
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration
Aim:	This unit concerns understanding customers and their needs, organisations' responses to customer relationships and customer relationship management

Learning outcome	The learner will:
1. Understand customers and their needs	
Assessment criteria	
The learner can:	
1.1	Describe the importance of understanding customers' wants and needs
1.2	Explain the role of segmentation in identifying customers' likely wants and needs
1.3	Describe the factors that motivate customers to buy
1.4	Explain the importance of seeking customer feedback on performance, products and/or services

Range
Segmentation Age, gender, religion, culture, income, lifestyle
Factors Price, incentives/promotions, recommendations, needs/wants, advertising

Learning outcome	The learner will:
2.	Understand an organisation's responses to customer relationships
Assessment criteria	
The learner can:	
2.1	Describe an organisation's marketing objectives and activities
2.2	Explain the importance of developing customer service plans and customer relationship plans
2.3	Describe an organisation's system for relationship management
2.4	Describe an organisation's customer care programme
2.5	Describe the system for communicating with customers
2.6	Explain the importance of a consistent level of service
2.7	Explain the link between customer satisfaction and sales growth
2.8	Explain the importance of using customer feedback to enhance performance, products and/or services

Range
<p>Customer service plan General to an organisation</p> <p>Customer relationship plan Specific to a client/customer group</p> <p>System Verbal: Non-verbal: survey, questionnaire, emails, texting, phone, face to face</p>

Learning outcome	The learner will:
3.	Understand the principles of customer relationship management
Assessment criteria	
The learner can:	
3.1	Explain the concept and principles of relationship management
3.2	Explain the importance of keeping promises made to customers
3.3	Explain the importance of balancing customers' needs with those of the organisation
3.4	Explain the importance of keeping customers informed of progress, problems, issues and the actions undertaken in support of them
3.5	Explain how to identify added value that could be offered to customers

UAN:	K/503/8194
Level:	Level 2
Credit value:	5
GLH:	40
Relationship to NOS:	This unit is linked to 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
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration
Aim:	This unit concerns understanding the role of digital marketing, the use of search engine optimisation (SEO), the requirements of marketing research using the internet, the uses of digital marketing device and messages and how to use digital technology for marketing purposes

Learning outcome	The learner will:
1.	Understand the role of digital marketing
Assessment criteria	
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
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 importance of digital data capture systems for digital marketing

Range
<p>Digital marketing Social networking, online advertising, mobile platforms, e-marketing, search, websites</p> <p>Sources Data capture eg competitions, membership sign-up, CRM system, customer details</p> <p>Legal requirements Disability Discrimination Act, Data Protection Act, Copyright, Trade Descriptions Act</p>

Learning outcome	The learner will:
2.	Understand the use of search engine optimisation (SEO)
Assessment criteria	
The learner can:	
2.1	Describe the use of SEO
2.2	Explain the importance of SEO
2.3	Explain the advantages and disadvantages of links to other websites

Learning outcome	The learner will:
3.	Understand the requirements of marketing research using the internet
Assessment criteria	
The learner can:	
3.1	Explain how to use search-related internet facilities to enable the identification and retrieval of targeted information
3.2	Explain the advantages and disadvantages of different internet data collection sources
3.3	Explain the importance of confirming the accuracy of information retrieved from the internet

Range
<p>Internet data collection sources Pay-per click, data analytics</p>

Learning outcome	The learner will:
4.	Understand the uses of digital marketing devices and messages
Assessment criteria	
The learner can:	
4.1	Describe the potential uses of a Customer Relationship Management (CRM) system
4.2	Explain the importance of data cleansing
4.3	Describe the use of digital marketing devices
4.4	Describe the use of digital response systems
4.5	Explain the advantages and disadvantages of different tracking systems

Range
<p>Marketing devices Direct email, e-flyers, social networking groups</p> <p>Response systems Questionnaires, competitions, promotions, vouchers</p> <p>Tracking systems Open rates, click through rates, conversion rates</p>

Learning outcome	The learner will:
5.	Understand how to use digital technology for marketing purposes
Assessment criteria	
The learner can:	
5.1	Explain how to use a CRM system
5.2	Explain how to maintain the currency and accuracy of digital databases
5.3	Explain the advantages and disadvantages of different digital technologies
5.4	Describe the importance of tailoring messages to different digital media
5.5	Explain the potential for marketing to social networking sites
5.6	Explain how to prevent marketing messages being identified as 'spam'

Range
<p>Digital technologies CRM systems, search engines, e-mail, social networks</p> <p>Digital media TV, mobile phones, computers</p>

UAN:	K/502/9933
Level:	Level 3
Credit value:	5
GLH:	40
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 1.2.1 Define the need for market research Marketing 1.2.2 Design market research projects Marketing 1.2.4 Collect market research data Marketing 1.2.7 Collect data on the knowledge, attitude and behaviours of target groups
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration
Aim:	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

Learning outcome	The learner will:
1.	Understand the basis on which market research is commissioned
Assessment criteria	
The learner can:	
1.1	Describe how to identify the need for market research and the sources of evidence 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 different options for conducting the research

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

Learning outcome	The learner will:
2. Understand how to design market research projects	
Assessment criteria	
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 factors 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 risks 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	

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

Learning outcome	The learner will:
3. Understand the principles of marketing data collection	
Assessment criteria	
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 requirements	

Range
Requirements Data Protection Act, internal procedures eg passwords for computers, lockable cupboards

Learning outcome	The learner will:
4.	Understand the principles of marketing data interpretation and evaluation
Assessment criteria	
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 data analysis methods
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 evaluation methods
4.7	Explain the basis on which to reach conclusions as to the usefulness of the research

Range
Data analysis methods Data mining, business intelligence, statistical applications
Evaluation methods 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.

Unit 306

Understanding the relationship between sales and marketing

UAN:	F/502/8223
Level:	Level 3
Credit value:	3
GLH:	21
Relationship to NOS:	This unit is linked to the Council for Administration NOS Sales 3-8 Sales 3-20 Marketing NOS 7.4.2
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration
Aim:	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

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

Range
Organisational structures Small, medium and large

Learning outcome	The learner will:
	2. Understand the interface between sales and marketing functions
Assessment criteria	
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	

Learning outcome	The learner will:
	3. Understand the impact of sales and marketing on product development processes
Assessment criteria	
The learner can:	
3.1 Describe the product development process	
3.2 Explain the role of sales and marketing in the product development process	
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 business case 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 customer feedback in relation to product development	

Range
Product development process Customer feedback, research, development, trial, marketing
Business case Formal, informal
Customer feedback 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
- Essential Skills (Northern Ireland) – see 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**.

Centre Manual - Supporting Customer Excellence 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, as well as updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document includes sections on:

- The centre and qualification approval process
- Assessment, internal quality assurance and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Management systems
- Maintaining records
- Assessment
- Internal quality assurance
- External quality assurance.

Our Quality Assurance Requirements encompasses all of the relevant requirements of key regulatory documents such as:

- SQA Awarding Body Criteria (2007)
- NVQ Code of Practice (2006)

and sets out the criteria that centres should adhere to pre and post centre and qualification approval.

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
- **Events:** dates and information on the latest Centre events
- **Online assessment:** how to register for e-assessments.

Useful contacts

UK learners General qualification information	T: +44 (0)844 543 0033 E: learnersupport@cityandguilds.com
International learners General qualification information	T: +44 (0)844 543 0033 F: +44 (0)20 7294 2413 E: intcgc@cityandguilds.com
Centres 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: centresupport@cityandguilds.com
Single subject qualifications 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: singlesubjects@cityandguilds.com
International awards 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: intops@cityandguilds.com
Walled Garden Re-issue of password or username, Technical problems, Entries, Results, e-assessment, Navigation, User/menu option, Problems	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: walledgarden@cityandguilds.com
Employer Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	T: +44 (0)121 503 8993 E: business@cityandguilds.com
Publications Logbooks, Centre documents, Forms, Free literature	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413

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As the UK's leading vocational education organisation, City & Guilds is leading the talent revolution by inspiring people to unlock their potential and develop their skills. We offer over 500 qualifications across 28 industries through 8500 centres worldwide and award around two million certificates every year. City & Guilds is recognised and respected by employers across the world as a sign of quality and exceptional training.

City & Guilds Group

The City & Guilds Group operates from three major hubs: London (servicing Europe, the Caribbean and Americas), Johannesburg (servicing Africa), and Singapore (servicing Asia, Australia and New Zealand). The Group also includes the Institute of Leadership & Management (management and leadership qualifications), City & Guilds Land Based Services (land-based qualifications), the Centre for Skills Development (CSD works to improve the policy and practice of vocational education and training worldwide) and Learning Assistant (an online e-portfolio).

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