The Chartered
Institute of Marketing

# THE CHARTERED INSTITUTE OF MARKETING

# Professional Diploma in Marketing (Level 6)

# FINAL DOCUMENT

# October 2008

### 1.0    CIM Level 6 Qualification

This document provides the rationale for the Chartered Institute of Marketing to provide a new level 6 qualification. It aims to outline the following:

- Typical profile of a level 6 learner and the potential target market for a CIM Level 6 qualification
- Guidance for student entry criteria
- QCA descriptors of a level 6 qualification
- Aspirations of learners taking a level 6 marketing qualification
- Job roles relevant to learners taking this level 6 marketing qualification
- Expected skills development
- Justification of the qualification's structure

### 1.1 Typical profile of level 6 learner and potential target market

The consultation process showed that the typical profiles of people taking our Level 6 qualification and hence the target market for this qualification are the following:

- Average age mid to late 20's
- Operational marketers
- Departmental managers
- Functional managers
- Product/brand managers
- Account managers
- Agency managers
- Marketing executives
- Business development managers

### 1.2   Guidance for student entry criteria

Following feedback from the consultation process and analysis of students who pass CIM qualifications first time have suggested that we should revise our entry criteria for students coming onto our Professional Diploma in Marketing. This means that only graduates with at least a third of their credits in marketing should now start their CIM studies with the Professional Diploma in Marketing. Those with fewer should start with the Professional Certificate rather than the Diploma unless they can demonstrate that they have sufficient marketing knowledge by passing the Level 6 Entry Test. This being the case, the entry criteria have been revised to be:

- Any business or marketing Batchelors or Masters Degree (or equivalent) where a minimum of one third of the credits come from marketing (i.e. 120 credits in Batchelors degrees or 60 credits with Masters Degrees) OR
- Experience in a marketing management role that has provided potential students with knowledge and competence equivalent to the learning outcomes of the CIM Professional Certificate in Marketing **and is sufficient to pass the Entry Test to Level 6**

### 1.3  QCA descriptors of a level 6 qualification

This qualification has been designed to meet the QCA descriptors for a level 6 qualification, which are for students to be able to:

- Critically review, consolidate and extend a systematic and coherent body of knowledge
- Utilise highly specialist technical or scholastic skills across an area of study and utilise research skills
- Critically evaluate new information, concepts and evidence from a range of sources
- Begin to lead multiple, complex and heterogeneous groups and exercise judgement in a number of complex planning, design, technical and/or management functions related to products, services, operations or processes including resources
- Ultimately, students are expected to transfer and apply diagnostic and creative skills in a range of situations

## 1.4 Aspirations of learners taking a level 6 marketing qualification

Consultation with students suggested that most of them take the CIM Professional Diploma in Marketing with the view to the following:

- Career progression
- Differentiating themselves from others
- Improving marketing knowledge and skills
- Aiding the process of getting a 'marketing job'

## 1.5 Job roles relevant to learners taking this level 6 marketing qualification

The tasks that employers expected people with a level 6 marketing qualification to be able to perform at work included:

- People management
- Budget management/bidding for budget
- Team leadership and management
- Assessing risk
- Project management
- Resource co-ordination
- Delivering the value proposition and marketing success
- Managing marketing intelligence
- Problem solving
- Implementing the strategic business/marketing plan
- Measurement and control
- Channel management
- Leading on NPD and innovation
- Communications – internal/external
- Agency management/account handling

## 1.6 Expected skills development (upon completion)

Again, employers expected students who had completed a level 6 marketing qualification to be able to demonstrate the following skills:

- Planning
- Decision making
- Prioritising
- Information management

- Monitoring
- Evaluation
- Communicating
- Thinking creatively
- Balancing needs and interests of all stakeholders

## 1.7    Justification of qualification structure

The aim of this qualification is to provide the knowledge, skills and 'ability to do' in relation to marketing planning and to assist with the development of the 'marketing professional' in the ways discussed above.  The qualification is a hybrid of marketing with a considerable emphasis on management as marketers move from specialist aspects of marketing into either a functional or departmental role.  The focus shifts from theoretical concepts of marketing to providing insights into the key aspects of managing the marketing function as well as recognising various departmental opportunities such as channel management, communications, customers, NPD/innovation, etc.

Each of the units is expected to be delivered over 50 guided learning hours, with a mixed assessment strategy of examinations and assignments.

## ASSESSMENT METHODOLOGY FOR LEVEL 6

The following criteria have been considered in developing the assessment methodology for the new Professional Diploma in Marketing.

- There will be four assessment sessions a year
- Summative assessments will be developed for each unit and the assessments will change for each diet
- There will be ONE form of assessment for each unit
- A variety assessment approaches will be adopted across the programme based on what is the most appropriate form of assessment to test the learning outcomes of each unit. This will include at least one examination and one work-based project
- The assessment principles of reliability, validity, relevance and transferability will inform the assessment design
- Assessments will provide students with the opportunity to demonstrate their competency in a work related context
- Assignment based assessments will be contextualised to ensure an individualised response and to reduce the risk of plagiarism and collusion
- All tasks within the examinations and assignments will be compulsory
- Assessment criteria and mark schemes will reflect grade descriptors for Professional Diploma level and magic formula (concept 30%, application 30%, evaluation 30% and format/presentation 10%)
- Grading Criteria: A 70% and over, B 60 – 69%, C 50 – 59%, D 45 – 49%, E 40 – 44%, F 30 – 39%, U less than 30%
- All assessments will be marked by CIM


### Unit 1: The Marketing Planning Process
- Work based assignment involving the preparation of a marketing plan

### Unit 2: Delivering Customer Value Through Marketing
- Three hour unseen examination based on a pre-seen case material

### Unit 3: Managing Marketing
- Work-based assignment

### Unit 4: Project Management in Marketing
- Work-based project requiring an in-depth study of a specific and focused area of business activity

# Unit 1 – The Marketing Planning Process

This unit is designed to provide a detailed understanding of marketing planning, including the synergistic planning process and its links with the delivery of marketing strategy.  It also considers a thorough assessment of the dynamic and complex nature of the marketing environment and its impact on developing marketing plans to achieve strategic outcomes and competitive advantage in the market place.

The unit includes significant consideration of segmentation, targeting and positioning, with a view to developing sophisticated approaches to targeting customers and the development of effective positioning strategies, all based upon a sound assessment of market segment opportunities and value.

By the end of this unit, students should be able to apply the concept of the marketing planning process to a variety of organisational contexts and sectors, and to account for their varying goals when developing marketing plans.  They should be able to demonstrate their ability to relate the challenges posed by a dynamic marketing environment to the marketing planning needs of different organisations and to devise appropriate, innovative positioning strategies in response to environmental changes.

**Overarching learning outcomes:**

By the end of this unit students should be able to:

- Evaluate the role of the marketing planning process and the marketing plan implementation in a range of marketing contexts including that of the organisation's strategy, culture and broader marketing environment
- Evaluate the interconnectivity between corporate, business and marketing objectives and consider the impact of the external marketing environment and the organisation's resources on their development and achievement
- Conduct a marketing audit including a detailed analysis of the internal and external marketing environments
- Assess the findings of the audit and develop a marketing plan that is responsive to market and organisational changes and underpins the organisation's marketing strategy, Determine the importance of segmentation, targeting and positioning and their relative interdependencies and develop effective segmentation, targeting and positioning strategies which are innovative, cost effective, valuable and maximise the potential marketing opportunities successfully
- Utilise a range of positioning platforms including price, quality, service and brand perception, to establish an organisation's marketing positioning strategy
- Recognise the significance of retaining existing customers through relationship marketing when developing strategies to achieve marketing objectives

**Section 1 – Marketing planning to deliver marketing strategies (weighting 25%)**

1.1     Critically evaluate the different roles of marketing and its cross-functional interaction within organisations
- *marketing as an organisational function and orientation*
- *marketing as a coordinating force in the organisation*
- *marketing's interface with other organisational functions*

- *exchange, transactions and relationships*
- *markets, customers, competition and value creation*
- *marketers as planners, strategists and tacticians*
- *marketing in theory and in practice*

1.2    Critically evaluate the synergistic planning process including the different components of the marketing plan and its links with delivering the organisation's corporate, business and marketing strategies
- *the purpose of marketing planning*
- *achieving a sustainable competitive advantage*
- *the stages of the marketing planning process: analysis, planning, implementation and control*
- *sequential, cyclical, and iterative approaches to planning*
- *the outcomes of planning and plans*
- *contents of a marketing plan*
- *documentation and reality*

1.3    Critically evaluate the role of the marketing plan in relation to the organisation's philosophy and an organisation's strategic intent
- *the marketing plan as means of conveying organisational purpose and future vision*
- *the marketing plan as vehicle for setting direction and focus*
- *the marketing plan as an operational framework*
- *the marketing plan as a method of resource and budget allocation*
- *the marketing plan as a tool for performance measurement*

1.4    Evaluate the relationship between corporate, business and marketing objectives at an operational level and describe how they impact upon the activities associated with the marketing plan
- *identifying a hierarchy of objectives*
- *objectives at varying levels and time scales*
- *different types of objectives: organisational, innovation, financial, market, relationship-focussed, societal, non-profit*
- *consistency of plans with objectives*
- *resource issues and constraints*

1.5    Assess the external and internal influences on the formulation of objectives and specify the key environmental drivers of organisational change
- *recognition of environmentally driven marketing planning and the resource-based view of the firm*
- *identify internal influences on objectives including objective setting process, corporate mission and strategy, culture, resources, capabilities*
- *identify external influences on objectives including economic conditions, markets, competition, industry life cycle, technological development*
- *identify drivers of organisational change including innovation, evolving consumer behaviour, globalisation, ethical consumption and corporate social responsibility, sustainability relationship management, stakeholder relations, globalisation*

1.6    Critically evaluate the wider impact of external and internal environmental forces on the setting of objectives at different levels and the process of planning marketing
- *macro-environment: political, cultural, social, economic, technological, legal, ecological, ethical*

- *micro-environment: market, customers, competitors, industry structure and dynamics, suppliers, intermediaries*
- *internal environment: capabilities in functional areas, assets and core competencies, product and service portfolio, innovation, business relationships and strategic partnerships, current market position and past performance, dynamic capabilities, competitive advantage*

**Guidance on development and context**

In this section of the syllabus, the purpose of marketing planning is considered in the wider context of the organisation's environment and capabilities. Students are expected to understand how the marketing planning process can facilitate the adoption of a market-led approach, and enable the marketing function to span the boundaries of other organisational functions in achieving customer value.

An important aspect of accomplishing this is recognising why and how marketing plans are developed, and the critical way in which they inter-relate with different objectives. At this stage, building from Level 4, it is essential to identify that varying objectives will pertain in a range of different organisational types, sectors and markets. In this unit, students will be expected to explicitly focus on how the practicalities of planning and plans translate into clear objectives at different levels for the organisation under consideration. This will apply to short-term financial goals as well as longer-term relationship building targets, which students will be familiar with from the Level 4 syllabus where stakeholders and their interests are discussed in depth.

The strategic context of marketing planning is set against a background of external drivers, such as new digital technologies, global and international issues, sustainability, credit crunch and other such challenges along with a resource-based view of the organisation. Again this builds from Level 4, but expects a much greater detail of the practical understanding of how continuous change in the external and internal environments influence marketing strategy in the planning process. This will provide a precursor to the skills required at Level 7 where the strategic influence of emerging themes in marketing is highlighted, and the ability to take and implement strategic marketing decisions is founded upon an analysis of the different dimensions of the marketing environment.

**Section 2 – The marketing audit and strategic outcomes (weighting 30%)**

2.1    Critically evaluate the practicalities of undertaking a marketing audit including resource limitations and implications within the organisational context
- *conducting a marketing audit in practice*
- *scope, timing and frequency*
- *responsibility and objectivity*
- *constraints and issues*

2.2    Assess the concept of the organisation as an open system faced with changing environmental conditions and internal capabilities
- *complex and dynamic external environment*
- *variability in organisational resource, asset and competence base*
- *controllable and uncontrollable influences*
- *responding to external and internal change*
- *shaping strategy and plans proactively*

2.3    Appraise the process of auditing the marketing environment and make recommendations for the utilisation of various approaches in a range of different organisational contexts and sectors
- *past, current, and future oriented perspectives*
- *organising information for planning*
- *marketing audit structures e.g. environment, strategy, organisation, systems, productivity and functions audits*
- *external and internal sources of information*
- *organisational and sectoral constraints*
- *using models and frameworks to facilitate understanding*

2.4    Evaluate the external marketing environment through detailed analysis using a variety of marketing audit tools and techniques
- *the evolving nature and extent of external environmental change*
- *marketing intelligence and environmental scanning*
- *macro and micro environmental analysis frameworks*
- *gauging the impacts of external forces on marketing planning*
- *identifying key external issues and assumptions*
- *external audit tools e.g. PESTEL, Porter's Five Forces, and strategic group mapping*

2.5    Assess the internal marketing environment of an organisation through an audit process using a range of evaluation processes and approaches
- *the evolving nature and extent of internal organisational change*
- *developing resource-based planning and strategy*
- *internal environmental analysis frameworks*
- *establishing the effects of organisational resources and capabilities on marketing planning*
- *identifying key internal issues and assumptions*
- *internal audit tools e.g. product life cycle, portfolio models, and the value chain*

2.6    Utilise the planning gap as a means to identifying and assessing key marketing planning requirements to fulfil the organisations marketing strategy
- *establishing objectives and the planning gap*
- *generating alternative strategic options*
- *filling the planning gap with new and existing strategies*
- *evaluation of marketing opportunities and the achievement of competitive advantage*

2.7    Assess the issues and constraints arising from the marketing audit and consider the consequences for the organisation in order to the develop its marketing plan
- *prioritising issues and executing SWOT analysis*
- *specifying marketing objectives, strategies and plans*
- *consideration of timescales for implementation*

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**Guidance on development and context**

This section of the syllabus, which deals with the marketing audit, requires that students are able to use a range of sources of information to assess the current and future position of the organisation.  Furthermore, they are expected to be able to synthesise the information and propose strategic directions for the organisation based upon the audit using a range of different tools and techniques.

This section builds upon the broad introduction to the marketing audit provided at Level 4, and similarly requires an understanding of marketing information and analysis, and the different aspects of the marketing environment provided at that level.

However, in this unit, students are expected to be able to undertake a comprehensive marketing audit, including the brand and product. They should be aware of the constraints and challenges of doing so in reality, and in particular identify any specific factors that may relate to different organisational types, sectors and markets. Students should be fully aware of the contributions that individual products and brands make to the organisation, together with the overall branding and positioning benefits of the organisation itself.

By taking the audit information forward into a strategic process of evaluation, this will enable students to understand the link between analysis and strategy. Moreover, it prepares them for Level 7 studies where the strategic audit and market-led strategic change are considered in much greater detail.

**Section 3 – Creating marketing strategies through segmentation, targeting and positioning (weighting 25%)**

3.1    Critically evaluate the role of marketing strategies and demonstrate how they can be used to develop competitive advantage, market share and growth
- *marketing strategies for meeting marketing objectives through satisfying customer requirements*
- *marketing strategies as product 'offers' providing benefits to customer segments*
- *identifying customers and offers for future development*

3.2    Assess the importance of market segmentation as a basis of selecting markets to achieve the organisation's business and marketing objectives via customer satisfaction
- *defining local, national, international and global markets and their parameters*
- *principle of market segmentation, targeting, and positioning*
- *benefits and costs of market segmentation*
- *conditions for successful segmentation*

3.3    Critically evaluate the different segmentation approaches available to organisations in different organisational contexts and sectors and make recommendations for their use
- *segmentation variables for consumer markets*
- *segmentation variables for business markets*
- *profiling segments and defining customer types*
- *critical evaluation of segmentation techniques*
- *contemporary methods of segmentation such as relationship-based approaches and online behaviours*

3.4    Assess the value of 'targeting' markets as an approach to achieving customer satisfaction, competitive advantage and retention
- *focused effort and resource efficiency*

- *potential for achieving short, medium, and long term objectives*
- *potential for achieving competitive advantage*
- *scope for competitive advantage through distinctive positioning*

3.5    Critically evaluate a range of targeting coverage strategies for different organisational contexts and sectors
- *undifferentiated marketing*
- *differentiated marketing*
- *concentrated marketing*
- *customised marketing*

3.6    Assess the attractiveness and value of selected market segments
- *external and internal criteria for evaluation: size, growth, profitability, relationship potential, competition, capabilities*
- *segment evaluation process: factor weighting and ranking of alternatives*
- *fit between potential and internal considerations*

3.7    Examine the concept of marketing positioning strategy and how it can be used to convey the organisation's value proposition
- *differential advantage, customer value, and organisational benefits*
- *consideration of alternative positioning strategies*
- *relationship positioning strategies*
- *competitive positioning strategies*
- *selection of target markets and point of differentiation*
- *positioning and perceptual maps*

3.8    Critically evaluate positioning options and their implementation within the context of the organisation and its markets
- *criteria for effective positioning and competitive advantage*
- *positioning and the marketing mix*
- *positioning and repositioning in practice*

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**Guidance on development and context**

The focus in this section is on segmentation, targeting and positioning (STP) strategies.  Students are expected to be able to critically evaluate strategic options within this stage of the marketing planning process and propose outcomes that relate to competitive positioning.  In so doing, they will require detailed understanding of the three components of the STP process and be particularly aware of its relevance to the organisation that is under consideration and the markets that it operates in.  The knowledge that student have of the marketing mix from Level 4, and other units at this level, will be critical to developing detailed positioning strategies.

Of particular importance is the recognition that strategies need to be assessed in terms of their future contribution to the organisation's specific contextual objectives. When considering different contextual settings again it is important to consider the wider sector considerations including B2B, B2C, Third Sector, Not-for-Profit, international and ongoing issues of standardisation versus customisation for the organisation. In addition, students need to become familiar with the notion that both internal and external factors should contribute to any appraisal of the attractiveness of the value of alternative market segments. The resultant positioning of the organisation, its brands and products in the market need to be supported by an integrated and coordinated combination of marketing mix elements.

This phase of the planning process will be based upon information collected from the marketing audit and strategic evaluation approaches, and will provide students with a strong practical platform from which they can launch their Level 7 studies. In particular, it will prepare them for undertaking analysis and making strategic marketing decisions which are principal elements of study at the next level.

**Section 4 – Adapting marketing planning in different contexts (weighting 20%)**

4.1     Assess the significance of the key dimensions of implementing marketing planning in practice
   - *organisational structures, systems, and processes*
   - *forecasting and budgeting*
   - *time-scales and responsibilities*

4.2     Critically evaluate the barriers and constraints to implementing marketing planning, and consider how they may be addressed by organisations
   - *managerial, organisational, and cultural shortcomings*
   - *planning inadequacies*
   - *poor and inadequate organisational resource*
   - *lack of innovation*
   - *failure to integrate into corporate planning systems*
   - *monitoring performance metrics and control mechanisms*
   - *contingency planning*
   - *internal marketing*

4.3     Propose and justify approaches to implementing the process of marketing planning in different contextual settings
   - *marketing planning for different stakeholder groups*
   - *planning in consumer and business-to-business markets*
   - *services marketing planning*
   - *issues of marketing planning in large and small organisations*
   - *internal marketing segmentation*
   - *marketing planning in non-profit organisations*
   - *the international and global dimension of marketing planning*
   - *marketing planning in highly competitive markets*
   - *facilitating relationship-based marketing planning and customer retention*
   - *planning marketing in the virtual marketplace*

**Guidance on development and context**

In this final section, the issue of implementation of the marketing planning process and plans is explored. Initially, generic aspects of implementation are examined, which builds upon previous study at Level 4 and is closely associated with some parallel themes at this level with regard to managing the marketing function.

The pervasive nature of marketing's domain in modern business and society requires that students studying marketing at this level have a detailed grasp of how it applies to specific organisational, industry, international, global, sectoral, and market contexts, each of which has its own particular issues, constraints and opportunities. Wide-ranging consideration is given to the practicalities of implementing marketing plans where defined parameters affect such factors as the scope of the plan, the nature of the objectives to be pursued, the resources required and available, the

relationships that exist with current and future stakeholders, and the degree of tangibility of the offer.

This section therefore provides students who go on to study at the next level with the particular skill of being able to assess how organisational context influences marketing planning, and the way in which this should be addressed when implementing marketing plans in different organisational settings. Students should always be mindful of the fact that their approaches to developing and implementing strategies should be creative, innovative and focused on achieving competitive advantage in the context of different organisations and sectors.

# Unit 2 – Delivering Customer Value through Marketing

The unit's primary focus is the development and execution of marketing activities that have been designed to achieve customer satisfaction and meet organisational objectives, through effective marketing mix strategies which deliver stakeholder value.

The unit includes the development of the product portfolio, managing marketing channels, managing the communications mix and managing the service expectations of customers.

The unit examines the use of the marketing mix to achieve an organisation's corporate and marketing objectives, and to deliver marketing activities which reflect the desired positioning of the organisation's products and services in addition to its brand values.

By the end of the unit, students should be able to apply the marketing mix and determine strategies that deliver highly effective and competitive marketing activities that meet customer needs and organisational objectives, in different organisational contexts and sectors.  Students should be aware that the unit addresses marketing in the context of both domestic and international activities.


**Overarching learning outcomes:**

By the end of this unit students should be able to:


- Develop and manage a brand and product portfolio in the context of the organisation's marketing strategies and objectives
- Develop and implement an effective and efficient channel management strategy which reflects the needs of stakeholders and considers the impact of the external environment
- Develop an effective and innovative communications strategy and plan which clearly delivers the organisation's proposition to the market, through effective segmentation and targeting of internal and external markets
- Utilise an innovative and effective integrated marketing mix to reinforce the organisation's brand values and overall marketing proposition and competitive advantage
- Determine customer requirements for product and service delivery to ensure the marketing proposition is customer-focused , efficient and effective

**Section 1 – Product proposition and brand management (weighting 25%)**

1.1    Critically evaluate the process for managing and developing an organisation's product portfolio to deliver best value products for customers in different market segments and achieve organisational and marketing objectives
- *definitions of 'product' in the context of different sectors*
- *product management's contribution to delivering customer value. Competitive advantage and achieving organisational/marketing objectives*
- *the rationale for managing and planning product portfolios for different market segments*
- *managing product profitability*

- *product life cycle*
- *BCG Matrix*
- *General Electric Model.*

1.2  Critically evaluate the role of branding in the context of the product portfolio, recommending different branding strategies which are appropriate to a range of organisational contexts and sectors
- *Role and importance of brand*
- *developing and building brand value*
- *rebranding*
- *international and global brands*
- *brand strategies.*

1.3  Critically evaluate the role and process of innovation and new product development including consideration of innovative, replacement, re-launched and imitative products and explain the strategic benefit in achieving best value
- *developing a culture of innovation across the organisation*
- *the role of innovation in product management and new product development*
- *rejuvenating existing products*
- *generating new and enhanced product ideas*
- *developing new products*
- *standardisation versus adaption*
- *adoption.*

1.4  Assess the links between product development, product positioning and pricing in terms of fit and alignment with an organisation's corporate and marketing strategies and customer requirements
- *positioning new products*
- *positioning strategies*
- *repositioning existing products*
- *positioning of products against competitors.*

1.5  Critically evaluate the importance of linking the product portfolio to price perception to ensure perceived value for money as part of the overall customer proposition
- *the role of pricing in product management*
- *pricing in the context of value for money*
- *price sensitivity*
- *the role of pricing in influencing customers*
- *the impact of changes in pricing on customer perception.*

1.6  Assess pricing frameworks that could be utilised by organisations to aid decision making about product lifecycles, product development and innovation
- *understanding price versus cost*
- *determining pricing levels*
- *pricing in relation to customer satisfaction*
- *pricing in relation to competition*
- *pricing in relation to value*
- *pricing for international markets*
- *the role of pricing in building market share*
- *pricing approaches and strategies.*

**Guidance on Development and Context**

This section of the syllabus examines in detail how products are developed, improved and managed throughout their life cycle. Students will be expected not only to understand the various tools, techniques and models used in product portfolio management, but also to be able to apply them practically in different organisational contexts, and for products in both domestic and international markets.

The section also explores the role of branding in the context of managing products. Students will need detailed knowledge of the principles of branding and, importantly, how to apply them across a wide range of organisations and sectors (including in domestic and international marketing environments).

Students will also consider the importance of positioning, specifically in the context of product development and ongoing product management. The subject goes beyond just knowledge of the basic aspects. Students will be required to apply knowledge and demonstrate a detailed understanding of how positioning is used, in different organisational contexts, to achieve product, marketing and corporate objectives.

Finally, in this section, students will evaluate the impact of pricing on the performance of product portfolios. The learning will focus on assessing and evaluating various pricing approaches and strategies and being able to apply the best pricing model in different organisational contexts and assess the impact of these on customers and on the organisation's ability to achieve its overall corporate goals.

### Section 2 – Channel management (weighting 25%)

2.1     Determine and prioritise the key principles and purposes of innovative and effective distribution strategies in order to deliver the organisation's business and marketing objectives in a range of different contexts and different sectors to maximise customer requirements
- *different types of distribution channels*
- *establishing channel strategies*
- *establishing channel needs (appropriate to different customers, organisations, sectors and countries)*
- *developing distribution objectives*
- *approaches to international distribution; agent; strategic alliance; joint venture; in-country operation, virtual/digital channels*
- *different marketing tools required to give a co-ordinated marketing approach*

2.2     Critically analyse the implications, challenges and constraints arising from internal and external environment in the context of the development of developing channel strategies
- *internal factors which influence channel strategy*
- *international and global factors influencing channel strategies*
- *ethical considerations*
- *intermediaries engagement with competitors*
- *environmental considerations*
- *economic/financial considerations*
- *understanding and determining customer channel requirements*
- *analysing competitor channel strategies.*

2.3 Assess the nature and scope of intermediaries and determine criteria for selecting intermediary partners and the likely Return on Investment (ROI) they can achieve
- *different types of intermediaries in distribution and the strengths and weaknesses of each*
- *level of innovation and development demonstrated*
- *the roles and responsibilities of intermediaries in distribution*
- *criteria for selecting intermediaries*
- *how intermediaries can influence profitability*
- *impact of new and emerging channels*

2.4 Determine the level and scope of controls required for effectively monitoring and managing distribution channels
- *setting objectives*
- *monitoring performance of distribution channels*
- *benchmarking of other sectors/organisations/countries*
- *managing third party relationships in channel management, locally and internationally.*

2.5 Assess the requirements for managing the various stakeholders' needs within the distribution channel, in particular, reviews, reporting, communications and conflict management
- *identification of the key stakeholders in channel management*
- *determining stakeholders' needs in channel management*
- *the role of information in channel management*
- *the importance of communications in channel management, locally, internationally and globally*
- *potential sources of conflict in local and international markets*
- *reducing time to market*
- *competitor conflicts*
- *identifying, managing and resolving conflict.*

2.6 Determine the contractual requirements and service level agreements for engaging intermediary partners within the distribution channel
- *types of contracts and typical terms*
- *implications of contracting with overseas*
- *role of service level agreements*
- *determining service levels based upon efficiency expectations*
- *establishing and monitoring key performance indicators*
- *on-going management and review of service level agreements.*

**Guidance on Development and Context**

This section of the syllabus explores the contribution of channel management in marketing. It goes beyond an understanding of the various types of channels and examines the key influences on channel choice, management and control. Students will examine the impact of a range of factors on the development and implementation of channel strategies. There will also be consideration of the role and impact on channel management of the organisation's various stakeholders, including channel intermediaries.

Students will be expected to apply their knowledge of channel management theory in a practical way, to a range of organisations across different sectors operating in domestic and international markets.

**Section 3 – Managing marketing communications (weighting 30%)**

3.1    Determine marketing communications strategy and objectives to align with and deliver the organisations marketing strategy and plans
- *the role of marketing communications*
- *legal aspects of marketing communications*
- *global/international aspects of marketing communications*
- *aligning communications strategy to corporate and marketing strategy*
- *utilising communications strategies to achieve competitive advantage*
- *strategic aims of marketing communications*
- *the role of communications in achieving competitive advantage*
- *the contribution of marketing communications in relationship marketing for all stakeholders*

3.2    Prioritise the internal and external marketing segments to be targeted for marketing communications in different organisational contexts and sectors
- *role of internal communications*
- *identifying key internal audiences*
- *internal communications methods; Intranet; notice boards; seminars; briefings, newsletters; portals; SMS*
- *identifying key external audiences*
- *role of marketing communications in different organisational contexts and sectors*
- *Internal marketing as a key tool to aid and deliver service excellence*

3.3    Critically evaluate a range of communications mixes and recommend appropriate creative, innovative, sustainable and co-ordinated approaches to communications activities and creating the optimal mix for internal and external marketing activities
- *advertising, including writing and checking copy*
- *personal selling*
- *direct marketing*
- *online media*
- *media tools and media message*
- *sales promotions*
- *PR, exhibitions and sponsorships*
- *online forums; blogs; social networks*

3.4    Develop and manage a co-ordinated marketing communications plan, in the context of the strategic marketing plan, in order to establish and build relationships appropriate to the needs of customers, stakeholders and prospects in different organisational contexts and sectors
- *developing a communications plan*
- *communications planning frameworks*
- *the role of communications in building customer relationships and value*
- *role of communications in gaining new prospects*
- *communications planning and execution in different organisational contexts and sectors,(B2B, B2C, Third Tier, Not-for-Profit, International/global)*

3.5    Critically evaluate and select the most appropriate marketing communications agency for the utilisation of marketing communications capability against agreed criteria
- *the role and value of agencies in marketing communications*
- *the inclusion of innovative and effective means of communication*

- *how agencies are structured*
- *criteria and process for selecting an agency*
- *fees and fee structures.*

3.6    Recommend and justify an approach to managing agency relationships including reporting, monitoring and measuring performance
- *managing agencies locally and internationally*
- *conducting regular reviews against clearly defined service level agreements*
- *key information in managing agency relationships*
- *establishing objectives and measuring agency performance.*

3.7    Recommend appropriate methods for measuring marketing communications activities and successful delivery of the marketing communications strategy
- *setting marketing communications objectives*
- *measuring the effectiveness of marketing communications activities*
- *benchmarking communication effectiveness against other organisations, sectors, countries and competitors*
- *the role of market research, locally and internationally*

**Guidance on Development and Context**

This section of the syllabus addresses the key role of communications strategy, planning and execution.  It examines both internal and external communications.

It goes beyond the basic level of knowledge and understanding of the promotional mix, although students will need to have this in order to be able to apply more integrated approaches across a range of organisational types, sectors and markets (both domestic and international).

Students will examine the role and importance of communications in the achievement of key business objectives, in particular income generation, customer retention and new business acquisition.  The contribution of communications in relationship management and in the development of prospects will also be explored.

Importantly, students will be required to apply methods of measuring the success, or otherwise, of marketing communications activities, both against the objectives which have been set internally and through external benchmarking against competitors.

Students will also require an awareness of the various legal and regulatory issues faced by marketers in the development and execution of marketing communications activities.

**Section 4 – Managing and achieving customers' service expectations through the marketing mix (weighting 20%)**

4.1    Develop clear objectives relating to the provision of service to customers
- *the importance of service*
- *identifying the needs and behaviours of customers*
- *what constitutes 'service' to customers?*
- *the role of service in building customer loyalty and competitive advantage*
- *organisational and financial benefits of customer acquisition and retention*
- *determining customer service requirements*

- *the role of key account management in developing customer service excellence*

4.2    Develop a customer service plan and customer care programme, designed to support customer service requirements, including innovative communications; relationship management and development; support; and operations/process management
- *identifying and evaluating  key components of the plan/programme*
- *identifying, analysing and managing key issues*
- *use of resources*
- *effective implementation*
- *measuring and monitoring performance*
- *role of communications in delivering customer service*
- *importance of operations and processes in delivering customer service.*

4.3    Assess the value, importance and financial implications of providing service level agreements to customers
- *role of service level agreements with customers*
- *typical service level agreements*
- *the costs of delivering against service level agreements*
- *benefits to the organisation of establishing service level agreements with customers.*

4.4    Determine the most feasible and viable approaches for managing key account customer for different organisational contexts
- *criteria for and identification of key account customers*
- *different approaches for managing key account customers*
- *role of communications*
- *the role of people in key account management and service provision*
- *key accounts in different organisational contexts and sectors.*

4.5    Assess the role and value, to the organisation, of sales/product information, including storage, retrieval and communication of information and its role in ensuring that revenue is increased or maintained for key account customers
- *use and value of information and how it will be used*
- *managing information*
- *storing and accessing information*
- *using information to develop marketing activities*
- *role of information in revenue generation.*

4.6    Critically evaluate and assess the customer relationship for possible risks, problems and issues and prepare contingencies for dealing with those risks as they emerge
- *likely risks, problems and issues in managing customer relationships*
- *contingency planning*
- *role of communications in dealing with problems.*

**Guidance on Development and Context**

This final section of the syllabus addresses how organisations, across a range of sectors and operating in different markets (including domestic and international), develop the marketing mix in order to meet customer service expectations.

A thorough knowledge of the extended marketing mix components is paramount. Students will then be expected to use this knowledge and apply it to different

scenarios and to demonstrate, through application, a detailed appreciation of what constitutes 'service' to various types of customers.

The syllabus examines a range of tools and techniques in delivering high quality service to customers, from customer service planning, to managing key account customers and the use of SLAs (Service Level Agreements) with customers.

The key role of customer and product information, its management, storage and retrieval, is also examined.  Students will be required to understand how organisations undertake these activities, and the risks and issues they face where they are not managed effectively.

# Unit 3 – Managing Marketing

The focus of this unit is about developing the marketer as a manager, including giving them the knowledge and understanding required to develop and manage the marketing infrastructure and the organisation's talent development, capability and capacity.  This includes developing effective quality systems and processes to support compliance and approaches to measuring and monitoring marketing activities.

The unit also includes developing and managing marketing teams, which includes co-ordinating the human, financial and physical resources within the team effectively.

Finally, the unit includes developing a detailed understanding of managing the financial aspects of the marketing function and its associated activities in order to ensure that the financial performance of the function is consistent, reliable and effective.

By the end of this unit, students should be able to demonstrate how they would approach the management of the marketing function and its associated marketing teams, including effective resource and financial management.

**Overarching learning outcomes:**

By the end of this unit students should be able to:

- Recommend how a marketing function should be structured to deliver competitive advantage, marketing and organisational success
- Assess a range of approaches that can be used to manage the marketing function on a day-to-day basis
- Prepare plans for showing how a team should be structured, selected, formed, managed and developed to demonstrate effective performance against objectives
- Critically assess the organisation's resource needs and capabilities  for the marketing team and manage its marketing activities effectively and efficiently
- Prepare appropriate   budgets and accounting documentation to support the financial  management of the  marketing function and associated marketing activities
- Critically assess the ongoing financial situation including manageability of the budget, financial stability and success of the marketing function.


**Section 1 – The marketing infrastructure (weighting 30%)**

1.1    Critically evaluate the importance of organisational structures in delivering marketing value, focus and creativity including consideration of how the work of the marketing operations is going to be undertaken:
- *functional structure*
- *product/market structure*
- *brand structure*
- *territory structure*
- *matrix structure*
- *international and multinational organisational structures.*

1.2 Critically assess the requirements of developing effective and efficient quality systems and processes to support compliance including evaluating and assessing the relevance of key quality concepts:
- *the importance of quality systems to the organisation*
- *a range of quality models e.g. Total Quality Management, European Foundation of Quality Management, ISO 9001, Six Sigma, ISO 14001, PAS2050, benchmarking*
- *PDCA Cycle – Plan, Do, Check, Act*
- *Deming 14 Steps for improving quality.*

1.3 Determine innovative and effective methods of measuring and monitoring marketing performance for marketing operation, marketing activities and effective resource management:
- *accounting measures of performance – profit and loss, balance sheets, cash flow and budgetary control*
- *productivity measures of performance – inputs versus outputs*
- *relationship marketing and customer related measures – retention, satisfaction and communication*
- *internal measures of performance – recruitment, retention, attitude, performance, communications*
- *innovation and learning measures of performance.*

1.4 Critically analyse monitoring information and recommend ways in which to improve marketing performance:
- *productivity analysis – inputs versus outputs*
- *comparative analysis – measuring changes over time*
- *segmental analysis – analysis of markets*
- *innovation audit – organisational climate, current performance, policies, practices and cognitive styles*
- *competitor comparisons and benchmarking*

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**Guidance on Development and Context**

This section of the syllabus is concerned with establishing effective systems and processes to measure and improve marketing performance. Students will be expected to demonstrate an understanding of how the marketing infrastructure impacts on the management activities that are explored in Section 2 of the syllabus.

Students will examine organisational structures and the impact of structure on work organisation, authority, relationships and job roles.

They will explore quality systems and processes and will be expected to demonstrate how quality systems can be used to improve marketing performance.

Students will be expected to apply a range of methods for measuring marketing performance in different organisational contexts and will therefore need to understand the models, concepts and theories in some detail. They will also be expected to determine which measures should be used in relation to organisational and marketing objectives, analyse the monitoring information resulting from those measures and make recommendations to improve marketing performance.

**Section 2 – Managing marketing teams (weighting 40%)**

2.1     Critically evaluate the differences between management and leadership and
        identify the role of an 'operational marketing manager':
        • *leadership traits, skills and attitude*
        • *leadership and management styles e.g. Action-Centred Leadership,*
          *Transactional Leadership, Transformational Leadership, Situational*
          *Leadership, the management styles continuum*
        • *the scope of leadership – providing strategic direction*
        • *the manager's role – planning, organising, coordinating, controlling,*
          *communication, teambuilding, coaching networking, development the*
          *functions of the marketing manager – information, value creation,*
          *communications*
        • *reflect on personal approach to management and leadership and produce*
          *a personal development plan*

2.2     Determine the needs for and show how to establish and build synergistic and
        harmonious marketing teams including preparing a plan to show how teams
        should be structured to deliver organisational and marketing objectives:
        • *structuring the team – the team audit, functional roles, team roles*
        • *team development and talent management – stages in team*
          *development, team cohesiveness, high performance teams, the*
          *manager's role*
        • *job analysis, job design, job enlargement, job enrichment*
        • *Competency development requirements*
        • *Flexible working practices*
        • *assess and apply a range of team theories e.g. Belbin's team roles,*
          *Tuckman's stages of team development*

2.3     Propose a range of approaches for the sourcing of a team, including
        consideration of recruitment, training and development to provide the right
        balance of competency and skills:
        • *recruitment channels – internally and externally*
        • *selection tools – job description, person specification*
        • *selection techniques – assessment centres, interviews*
        • *on-boarding – induction*
        • *training and development*
        • *outsourcing of jobs/projects*
        • *recruitment evaluation – determining recruitment effectiveness*
        • *legal considerations when recruiting.*

2.4     Plan how the work of the team will be undertaken establishing priorities and
        critical activities required to meet marketing and organisational objectives and
        with customers in mind:
        • *performance management and measurement – marketing strategy and*
          *individual objectives, communicating standards, techniques to measure*
          *performance against objectives and standards*
        • *internal marketing – aligning internal communications with external*
          *communications, managing knowledge.*

2.5     Propose approaches to manage and co-ordinate the work of teams and
        individuals to create effective working relations including appropriate levels of
        consultation, taking into account the balance of skills and activities available:
        • *characteristics of effective teamwork/high performing teams*

- *management skills and techniques – communication, motivation, empowerment, involvement, delegation, task allocation, feedback, running effective meetings, listening, assertiveness, group decision making*
- *assess and apply a range of management theories e.g. McGregor's Theory X/Y, Maslow's Hierarchy of Needs, Herzberg's Motivation-Hygiene Theory, McClelland's Motivation Needs Theory, Vroom's Expectancy Theory*
- *job enrichment/enlargement*
- *preventing discrimination and valuing diversity – equal opportunities and employment law*
- *reflect on personal approach to team management and produce a personal development plan*
- *flexible working practices*

2.6 *Propose approaches to manage and co-ordinate the work of remote teams to create effective working relations*
- *managing international teams, cultural considerations e.g. Hofstede's Cultural Dimensions, Trompenaar's Cross Cultural Communication*
- *managing virtual teams – benefits and constraints*

2.7 Identify potential areas of team conflict, identifying causes and making recommendations for ways in which to overcome it:
- *sources of conflict – interpersonal, change, organisational, external environment*
- *cultural differences*
- *assess the impact of conflict both positively and negatively*
- *conflict resolution and management*
- *change management strategies.*

2.8 Critically assess levels of performance in order to identify poor performance and, reasons for it and recommendations of how to overcome it including consideration of loyalty and motivation programmes:
- *performance management – measuring performance against objectives and standards and providing feedback*
- *appraisal and peer review including 360 feedback*
- *internal marketing – employee motivation and satisfaction, customer orientation and satisfaction, inter-functional coordination.*
- *Competency assessment and achievement*

**Guidance on Development and Context**

This section of the syllabus examines the role of the marketing manager. Students will be expected to demonstrate an understanding of management and leadership approaches, tools, techniques and theories. They will also be expected to apply them practically within an organisational context.

Students will be encouraged to reflect on their personal approach to managing and leading others and determine actions to improve both their own and their team's performance.

This section explores the whole spectrum of building high performing teams from team design and recruitment to operational management and performance management – the focus being on how to improve marketing performance through people. Students will be expected to apply their knowledge within an organisational context and make recommendations to improve performance. This organisational

context will vary, but it is particularly important to consider the issues of working in virtual and international cross-functional teams and the complexities of diversity and culture, that many managers deal with on a day to day basis.

Students will examine how to build a high performing team through effective team design and recruitment processes. They are not expected to have a detailed knowledge of employment law but should consider the impact of legislation throughout the recruitment process. When considering this element of the unit, it is important to be mindful that this element is leading towards building the organisations capacity and capacity, and thus it is essential to ensure that the right level of competency, combined with the right balance of individual talent is achieved to maximise the organisations potential to achieve competitive advantage.

Students will explore aspects of performance management. They will be able to set objectives for individuals that are designed to meet with marketing and organisational objectives. They will be able to determine methods to measure individual performance and make recommendations on how to improve individual performance. They should recognise the impact of the manager's approach on team member performance.

Students will explore team management in some detail. They will have the opportunity to assess approaches people management and will be expected to use this knowledge practically to improve their own performance as a manager.

### Section 3 – Operational finances for marketing (weighting 30%)

3.1     Assess the different requirements of managing the finances of the marketing function and associated marketing activities:
- *the manager's role – control, managing information, cross-functional communication*
- *the purpose of budgeting – planning, coordination of activities, motivation, control, relationship to management of the marketing team*
- *budget considerations – fixed, semi-fixed, variable and semi-variable costs.*

3.2     Critically evaluate the different approaches to setting the marketing and communications budget and associated marketing activities:
- *top-down budgets, bottom-up budgets*
- *the financial approach to setting budget – the budgeting process, percentage of sales/profit, competitive parity, affordable method*
- *the marketing approach – the planning and control process, objective and task approach, Share of Voice, cost-volume-profit*
- *forecasting, financial analysis, balance scorecard, resourcing.*

3.3     Evaluate the different information sources required to determine the marketing budget for marketing operations and activities:
- *data, information, intelligence and knowledge*
- *internal data sources -  sales figures, headcount,  outsourcing costs, consultant costs, EPOS system, MkIS external data sources including exchange rates variances arising from international trading*

3.4     Negotiate delegated budgets with colleagues and agree provisional budgets:
- *preparing a budget bid/business case to obtain priority budget for marketing activities*

- *negotiation tactics for bidding internally for budget to senior management*

3.5 Undertake cost benefit analysis of marketing activities establishing priorities and best value approaches to operations:
- *the balanced scorecard – learning and growth perspective, business process perspective, customer perspective, financial perspective*
- *value chain analysis*
- *cost control, cost improvement*
- *cost-volume-profit analysis*
- *break-even analysis*
- *sensitivity analysis.*

3.6 Establish effective cost management processes for marketing operations to ensure that costs are managed effectively to achieve viability in the long-term:
- *variance analysis – sales variance, cost variance*
- *cost control*
- *activity-based costing*
- *business process re-engineering.*

3.7 Assess budget variances, identify causes and recommend corrective actions where appropriate:
- *internal variance – organisational, impact of marketing strategy, internal constraints, product portfolio, international exchange rates*
- *external variance – the macro environment, customers, competitors, partners, suppliers, external stakeholders*
- *reconciling variances.*

3.8 Establish systems to monitor, evaluate and report on the financial performance of marketing operations and associated activities against the delegated budget:
- *stated standards of performance, KPIs, qualitative and quantitative standards*
- *internal sources of data – operating statements, expenditure, profit forecasts, cash flow statements, MIS, MkIS*
- *actual versus forecast*
- *plans to improve performance – cost reduction, marketing activities.*

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**Guidance on Development and Context**

This section of the syllabus is focused on ensuring that the marketing function achieves its objectives within budget. Students will explore costing, budgeting approaches, cost management and financial measurement. They will be expected to make recommendations to improve marketing performance based on financial analysis.

Students will need a detailed knowledge of budgeting and its role in the management and control of marketing performance. Importantly, students will need to know how to apply the budgeting process within an organisational context. They will examine the costs associated with marketing activities and will be able to determine information sources that could be used to gather the necessary information to determine the costs. They will also be expected to prepare appropriate budgets, identify causes of budget variances and make recommendations to improve performance against budget.

Students will also be expected to perform a cost benefit analysis of marketing activities that considers both qualitative and quantitative measurement.

# Unit 4 – Project Management in Marketing

This unit will focus on the proactive development and delivery of a justified management process to support the initiation, implementation and control of marketing projects, including the use of research and information and preparing proposals and briefs to identify needs comprehensively.

The unit will also focus upon evaluating marketing project proposals and prioritising them on the basis of fit with market conditions, organisational capacity, competitor activity and strategic management, while concurrently managing the associated risk of implementing particular plans.

Ultimately, the unit will also cover the implementation of marketing proposals including an in-depth view of project management, but also integrating knowledge from the other units at this level.

By the end of this unit, students should be able to develop an effective business case within different organisational contexts and justify their project proposals in terms of fit with the marketing strategy, evaluation of risk and the effective use of organisational capacity and capability.

**Overarching learning outcomes**:

By the end of this unit students should be able to:

- Identify the organisation's information needs, scope of research projects and resource capability to underpin the development of a business case to support marketing projects
- Develop an effective business case, complete with justifications, financial assessments and consideration of the organisation's resource capacity and capability to deliver
- Undertake a risk assessment programme with suggestions on how to mitigate for risks facing the organisation and the achievement of its business and marketing objectives
- Design, develop and plan significant marketing programmes, using project management tools and techniques, designed to deliver marketing projects effectively, in terms of quality, resource and delivery
- Integrate a range of marketing tools and techniques to support the development and implementation of a range of marketing projects
- Monitor and measure the effectiveness and outcomes of marketing projects through the end-to-end project process.

**Section 1 – Using marketing information to develop a justified case for marketing projects (weighting 15%)**

1.1   Critically assess the scope and type of marketing information required to develop effective business cases using both primary and secondary data:
   - *applied contextual research*
   - *situational specific evidence*
   - *gap analysis*
   - *empirical prerogatives.*

1.2      Critically assess how organisations determine their marketing information requirements and the key elements of user specifications for the purposes of building a case:
- *business intelligence*
- *product/process innovation*
- *culture*
- *source management*
- *output dissemination*
- *specialist sources*
- *Consultancy/advice*

1.3      Critically assess the scope, structure and characteristics of MIS and MkIS as marketing management support systems and evaluate their importance to business cases for marketing projects
- *corporate data*
- *operational data*
- *functional data*
- *the data fuelled organisation*
- *data manipulation and utilisation*
- *confidentiality and integrity*
- *business databases.*

1.4      Develop a research brief to meet the requirements of an individually specific case for marketing:
- *problem definition*
- *objectives*
- *information requirements*
- *data collection*
- *report parameters*
- *timescales*
- *resource allocation*
- *control and contingency.*

1.5      Critically evaluate a full research proposal to fulfil the brief supporting the information needs of the case and make recommendations for improvement:
- *proposal scoring*
- *brief reviewing*
- *the brief/proposal mechanic*
- *effort required for proposal versus available budget*
- *Decision to use in-house or external agency resources*
- *Utilisation of existing data*

1.6      Identify and evaluate the most effective methods for presenting marketing information and making specific marketing recommendations relating to product/service development and implementation as part of the case:
- *the marketing dashboard*
- *graphs, charts and  tables*
- *pie charts*
- *flow diagrams*
- *spreadsheets*
- *correlation and regression*
- *strategic impact statements*
- *effect and outcome metrics*
- *investment and income budgets*

- *measurement and control*
- *project reports*

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**Guidance on Development and Context**

This section of the syllabus allows the student to contextualise research around a specific undertaking.  The emphasis here is on the ability to disseminate varying amounts of information from disparate sources, identify gaps and consequently rationale for primary research.  As a result, candidates should be able to manipulate their findings and present a justified case for the development and management of a specific marketing project.

In addition, the section explores the interface between the research brief and the research proposal and how this inter-relationship should manifest in an organisational mechanic that limits the risk of failure.  Students must understand and appreciate how this applies in practice and will need to demonstrate their rigour in delivering and presenting these fundamental analyses.

Furthermore, the structure, format and illustration of findings are key to the final translation of any given marketing problem when managing solutions is the core business function.  Therefore a full range of professional presentation tools needs to be explored, adapted and applied in context.
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### Section 2 – Building a case for marketing projects (weighting 20%)

2.1    Define business case objectives for marketing plans and specific high expenditure marketing activities:
- *customer objectives*
- *management objectives*
- *profit objectives.*

2.2    Critically evaluate and assess the marketing potential for business case activities, including consideration of the assessments required to achieve the potential proposition:
- *projections*
- *forecasting*
- *pre/post trend extrapolation*
- *historical data review*
- *econometrics.*

2.3    Critically assess and evaluate customer groups relevant to the business case, matching their buying characteristics to the marketing proposition through the use of market research information:
- *customer specific profiling*
- *cross criteria scoring*
- *contextualised positioning.*

2.4    Determine the extent to which an organisation's marketing mix may need to be amended or adjusted to meet the requirements of the customer and broader stakeholders, and consider the impact of the change on the organisation:

- *management of the marketing mix*
- *investment/divestment.*

2.5 Critically assess the resource capability and capacity to deliver the business case proposals and consider the competency and skill requirements of both internal and external resources to deliver the business case proposition:
- *skills and competence*
- *role definition*
- *cross functionality*
- *agency management*
- *investment and income budgets*
- *recruitment.*

2.6 Present the business case and associated marketing plans for consultation and consideration, with full justifications for the proposed product/service initiatives and how they will support the delivery of marketing strategies and plans
- *the marketing report*
- *a structured presentation*
- *knowing the audience*
- *key impact indicators*
- *findings, prioritisation and conclusion.*

**Guidance on Development and Context**

This section of the syllabus develops the case further by assessing the organisational potential and the impacts and implications on capabilities and resources.

Students must recognise and fully define via formal SMART criteria the deliverables to be achieved while at the same time recognising that control mechanisms are introduced from the outset and not as a 'bolt-on'. It is therefore necessary to express the vision in core terms of customers, management and profit. A point of note here is that 'profit' can be defined from a number of perspectives and does not exclusively relate to financial standards. What determines the definition is the nature and scope of the project.

Within the section a framework exists for building the case and a sequenced approach maintains the mantra of 'limiting the risk of failure'.

Candidates are expected to evaluate relevant customer segments and clusters, critically rank and identify where the greatest impact exists and ensure any given project fits within the mindset of the customer relative to the competition.

There needs to be recognition of the availability of scant resources and the aspect here is to examine the structure, competence and capability of the organisation to implement and deliver. Having determined this, the student can recommend a strategic fit that becomes the vehicle by which the objectives are met. This will necessitate the adaptation of the extended marketing mix to be compatible with the proposed project.

With this in place, detailed and justified budgets can be formulated that fully outline the resource investment required and the resultant returns projected. It is important

here not to be superficial. The detail and complexity of this analysis will fully justify the case per se.

As in section 1, the presentation of the case is key and the formalised report should reflect this in a highly professional document.

**Section 3 – Assessing, managing and mitigating risk associated with marketing projects (weighting 25%)**

3.1     Critically evaluate the importance of developing an understanding of risk assessments in organisations in order to protect long term stability of a range of marketing projects
- *definition of risk*
- *risk perspective*
- *probability management*
- *risk culture*
- *strategic management.*

3.2     Critically evaluate the differences between the following types of organisational risk:
- *strategic*
- *operational*
- *financial*
- *knowledge*
- *compliance*
- *project-based areas of risk.*

3.3     Analyse and assess the potential sources of risk, of both internal and external origins, directly related to a specific case and consider the impact of these risks on the organisation:
- *internal strategic, operational, financial and hazard*
- *external social, legal, economic, political and technological.*

3.4     Design a risk management programme appropriate to measuring the impact of risk in the context of marketing projects:
- *risk audit*
- *risk evaluation*
- *risk report*
- *risk treatment*
- *risk monitoring.*

3.5     Undertake risk assessments on marketing projects and assess the impact of short/long-term tactical changes to the marketing plan:
- *customer assessment*
- *management assessment*
- *profit assessment.*

3.6     Critically evaluate the different approaches organisations can take to mitigate risk in order to reduce its potential to harm the organisation or its reputation:
- *organise for risk*
- *incorporate risk management*
- *risk avoidance*

- *risk transfer*
- *risk financing.*

3.7    Critically assess the strategic impact of implementing proposed risk control measures versus the strategic impact of taking no action:
- *business impact analysis*
- *event tree analysis*
- *threat analysis*
- *scenario analysis and planning*
- *assumption analysis*
- *probability analysis.*

3.8    Develop a range of methods for monitoring, reporting and controlling risk on an ongoing basis for project implementation:
- *risk audits*
- *risk management objectives*
- *risk reporting*
- *risk awareness*
- *risk response*
- *industry benchmarking.*

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**Guidance on Development and Context**

This section of the syllabus recognises the contemporary and practical alignment of risk management in an applied organisational context and the associated interface with fundamental marketing management.

There is no guarantee for success and a realisation of this dictates the imperative of a rigorous, disciplined and formal control regime.

Therefore, there is a need to incorporate the concept of risk within an organisation's orientation. This is not about negating innovation or implementation but more about assurance in practice.

The student will be expected to assess situational risks for example, relating to communications projects, CRM, New Product Development, to name but a few, within the parameters of marketing projects and therefore should examine these relative to the undertakings in section 2. So, in essence, the concepts and frameworks that candidates already know and understand from a core marketing perspective should now be applied in relation to risk.

To that end, students will drill down and focus their skills in auditing, planning and control.

The additional elements here are in effect around contingency and impact. As a result a relative examination of mitigation and a critical analysis of recommended actions are sufficient.

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**Section 4 – Project management for analysis, planning, implementation and control (weighting 40%)**

4.1    Critically evaluate different approaches to developing a culture of project planning within the marketing function and the organisation:
- *managing dynamics*
- *the marketing/project interface*
- *the project structured organisation*
- *planning, implementation and control*
- *policies, strategies and methodologies*
- *managing the project life cycle.*

4.2    Critically evaluate soft and hard projects in the context of marketing and consider the differences in terms of project implementation:
- *types of project*
- *strategic context*
- *operational context*
- *tactical context*
- *short/medium/long term objectives*
- *quality, investment and delivery.*

4.3    Develop the main stages of a marketing project plan, identifying the activities, estimating time and cost, sequencing of activities, and assess the competency and skills required of the people needed to deliver the project:
- *project initiation*
- *scope and objectives*
- *beginning/end dates*
- *key/core deliverables*
- *methodology adaptation*
- *project limitations*
- *risk management*
- *outline budgeting*
- *project implementation*
- *schedules/schemes of work*
- *resource reviews*
- *personnel requirements*
- *project termination*
- *project evaluation.*

4.4    Critically assess the importance of and techniques for establishing the marketing project's scope, definition and goals relative to the organisational marketing plan:
- *the project scoping document*
- *goals, objectives and critical success factors*
- *in/out of scope*
- *risk highlights*
- *assumptions*
- *roles and responsibilities*
- *stakeholder management.*

4.5    Utilise a range of tools and techniques to support project planning, scheduling, resourcing and controlling of activities within the project to enable effective and efficient implementation:
- *work breakdown structure*

- *cost analysis*
- *estimate forecasting*
- *Gantt charts*
- *critical path analysis*
- *histograms*
- *phase management*
- *feedback control systems.*

4.6    Utilise a variety of methods, measurements and control techniques to enable effective monitoring and measuring of progress throughout the project to ensure that it is completed to specification, on time and within budget:
- *the project scorecard*
- *objective review*
- *budget review*
- *update reporting*
- *productivity*
- *corrective action plans.*

4.7    Critically Assess the main techniques for evaluating effectiveness, success or failure  of a marketing project on its completion:
- *variance analysis*
- *outcome matrices*
- *profit/lose analysis*
- *liquidity analysis*
- *asset utilisation analysis*
- *investment performance analysis*
- *productivity analysis*
- *value analysis*
- *marketing mix analysis*
- *lessons learned.*

**Guidance on Development and Context**

This section of the syllabus realises the dynamic evolution of the marketing function and the practical fact that organisational management and planning are presenting common denominators.  Marketing projects and project management principles are inextricably linked and a paradigm exists.

Students should examine core project management techniques and identify the interface with the principles of marketing management.  The appreciation and understanding of this relationship will allow the integration of dual concepts in a practical scenario.

This section in turn becomes the marketing project plan and is built from the study and application of the content from the previous three sections.  Candidates will therefore be expected to integrate not only their knowledge from the other units and previous study but also a coherent application of the concepts and frameworks specifically introduced here.

Having arrived at a justified position for the project, the student will now formulate the initiation, the progression, the measurement and the completion of a contextualised marketing project.

The core content of this section is clearly defined and should be used as a template for what becomes the project document.  What will emerge is a cumulative and summative understanding and practical application of a concept for managing marketing projects.