Higher Nationals

Marketing Management for England

Specification

For use with the Higher National Certificate in Marketing Management for England

First teaching from September 2025
First Certification from 2026

Higher National Certificate Lvl 4

Undergraduate Level Qualification

Pearson BTEC

About Pearson

We are the world's leading learning company operating in countries all around the world. We provide content, assessment and digital services to learners, educational institutions, employers, governments and other partners globally. We are committed to helping equip learners with the skills they need to enhance their employability prospects and to succeed in the changing world of work. We believe that wherever learning flourishes so do people.

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ISBN 978 1 292 74005 8

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Summary of changes in Pearson BTEC Higher National qualifications in Marketing Management for England Issue 1 changes

Summary of changes made between previous issue and this current issue	Page numbers
3.1.2 Removed reference to the Sales Executive occupational standard	Page 14
Unit 2 Principles of Marketing and Sales LO4 P4 assessment criteria rewritten for clarification	Page 72

If you need further information on these changes or what they mean, contact us via our website at: qualifications.pearson.com/en/support/contact-us.html.

Contents

1.0 Introduction 1

1.1 Qualifications indicated 'for England' 1

1.2 Qualifications not indicated 'for England' 1

1.3 The student voice 2

1.4 Why choose Pearson BTEC Higher Nationals? 2

1.5 HN Global 3

1.6 Qualification titles 3

1.7 Qualification code 3

1.8 Awarding institution 3

1.9 Key features 4

1.10 Qualification frameworks 4

1.11 Collaborative development 5

2.0 Programme purpose and objectives 6

2.1 Purpose 6

2.2 Objectives 6

2.3 Aims of the Pearson BTEC Level 4 Higher National Certificate in Marketing Management 7

2.4 Developing students' employability skills and academic study skills 8

2.4.1 Use of maths and English within the curriculum 10

2.5 What could these qualifications lead to? 10

2.5.1 Progression to university 11

2.5.2 University recognition and articulations 11

3.0 Preparing students for employment 12

3.1 Designing with employers, for employers 12

3.1.1 Employability skills and competencies for student career success 13

3.1.2 Developing competencies for the workplace 14

3.1.3 Professional body recognition and exemption 16

4.0 Centre support 17

4.1 Specification 17

4.2 HN Global 17

4.3 Authorised Assignment Briefs 18

4.4 Pearson English 18

5.0 Planning your programme 19

5.1 Delivering Higher Nationals 19

5.1.1 Centre approval 19

5.1.2 Tutor knowledge 20

5.1.3 Resources 20

5.1.4 Delivering learning 20

5.1.5 Support from Pearson 20

5.2 Entry requirements and admissions 21

5.2.1 English language requirements 21

5.3 Access to study 22

5.4 Student registration and entry 22

5.5 Access to assessments 23

5.6 Administrative arrangements for internal assessment 23

5.6.1 Records 23

5.6.2 Reasonable adjustments to assessment 24

5.6.3 Special consideration 24

5.6.4 Appeals against assessment 24

5.7 Dealing with malpractice in assessment 25

5.7.1 Student malpractice 26

5.7.2 Tutor and centre malpractice 26

5.7.3 Sanctions and appeals 26

6.0 Programme structure 29

6.1 Units, credits and Total Qualification Time (TQT) 29

6.1.1 Guided learning hours 29

6.1.2 Independent learning hours 30

6.2 Programme structures 31

6.2.1 Pearson BTEC Level 4 Higher National Certificate in Marketing Management 31

6.3 Pearson-set units 32

6.4 Unit descriptor example 33

6.4.1 Web resources – referencing 34

7.0 Assessment 35

7.1 Principles of internal assessment 35

7.1.1 Assessment through assignments 35

7.1.2 Using unit-based criteria 36

7.1.3 The assessment team 36

7.1.4 Effective organisation 37

7.1.5 Preparing students 38

7.2 Making valid assessment decisions 39

7.2.1 Authentic student work 39

7.2.2 Making assessment decisions using criteria 39

7.2.3 Dealing with late assignments 40

7.2.4 Providing assessment decisions and feedback 40

7.2.5 The opportunity to resubmit an assignment 41

7.2.6 Repeat units 41

7.2.7 Assessment boards 41

7.3 Planning and record keeping 42

7.4 Calculating the final qualification grade 43

7.4.1 Conditions for the award 43

7.4.1.1 Conditions for awarding our HNC 43

7.4.2 Compensation 43

7.4.2.1 Compensation for the HNC 43

7.4.3 Calculating the overall qualification grade 44

7.4.3.1 Points per credit 44

7.4.3.2 Point boundaries 44

7.4.4 Modelled student outcomes 45

7.4.4.1 Pearson BTEC Level 4 Higher National Certificate 45

8.0 Quality assurance 46

8.1 The approval process 46

8.2 Centre and qualification approval 47

8.3 Monitoring internal systems 47

8.4 Independent review of assessments 48

8.5 Annual programme monitoring report (APMR) 48

8.6 Annual student survey 48

8.7 Continuing quality assurance and standards verification 48

8.7.1 Our key principles of quality assurance 48

8.8 Use of Higher Technical Qualifications (HTQ) quality mark 50

9.0 Recognition of Prior Learning and attainment 51

10.0 Equality, diversity and inclusion 52

10.1 Access to qualifications for students with disabilities or specific needs 53

11.0 Units 54

Unit 1: The Marketing and Sales Environment 55

Unit 2: The Principles of Marketing and Sales 65

Unit 3: Market Research and Techniques (Pearson-set) 74

Unit 4: Managing Customers 83

Unit 5: Business Skills and Communications 92

Unit 6: Products, Content and Multi Channels 101

Unit 7: Marketing Strategy and Planning 109

Unit 8: Managing Marketing and Digital Communications 117

Appendix 1: Mapping of HNC in Marketing Management for England against FHEQ Level 4 125

Appendix 2: HNC Marketing Management Programme Outcomes for Students 129

Appendix 3: Transferable Skills Mapping 130

Level 4 Higher National Certificate in Marketing Management: mapping of transferable employability and academic study skills 130

1.0 Introduction

BTEC is one of the world's most recognised applied learning brands, engaging students in practical, interpersonal and thinking skills for more than three decades.

BTECs are work-related qualifications for students taking their first steps into employment, or for those already in employment and seeking career development opportunities. BTECs provide progression into the workplace, either directly or via study at university, and are also designed to meet employers' needs. Therefore, Pearson BTEC Higher National qualifications are widely recognised by industry and higher education as the principal career-related qualification at Levels 4 and 5.

When developing our BTEC Higher National qualifications, we work with a wide range of students, employers, higher education providers, colleges and subject experts to make sure the qualifications meet their needs and expectations. We also work closely with professional organisations to make sure the qualifications are in line with recognised professional standards.

The Pearson BTEC Higher National qualifications are designed to reflect the increasing need for high-quality professional and technical education at undergraduate Levels 4 and 5. They provide students with a clear line of sight to employment and to a degree at Level 6 if they choose.

1.1 Qualifications indicated 'for England'

Qualifications that are indicated as 'for England' are designed to align to the requirements of specific occupational standards that meet the Institute for Apprenticeships and Technical Education's (IfATE) current occupation criteria. Meeting the requirements of the occupational standards relates to:

- qualifications that are 'quality marked' as Higher Technical Qualifications (HTQs)
- the knowledge, skills and behaviours for identified occupations associated with the relevant occupational standards.

1.2 Qualifications not indicated 'for England'

Qualifications that are **not** indicated as 'for England' can be delivered at any centre, in the UK or overseas, subject to approvals from Pearson. These qualifications are not 'quality marked' as HTQs by IfATE.

1.3 The student voice

Students are at the heart of what we do. That is why we consult them from the start when developing our Higher National qualifications. We involve them in writing groups, seek their feedback and take note of their opinions.

This helps us develop the best possible qualifications and learning experience for students worldwide.

1.4 Why choose Pearson BTEC Higher Nationals?

Pearson BTEC Higher National qualifications take a student-centred approach to the curriculum. There is a flexible, unit-based structure that focuses on developing the practical, interpersonal and thinking skills the student will need to succeed in employment and higher education. They represent the latest in professional standards and provide opportunities for students to develop skills and behaviours for work, for example by taking part in a group project or meeting a client brief. A student may be exempted from professional or vendor qualifications and membership of selected professional organisations, in order to help students on their journey to professional recognition or membership.

Pearson BTEC Higher Nationals are intended to keep doors open for future study if a student wishes to take their education further after completing a Higher National programme. They do this by allowing space for students to develop their higher education study skills, such as the ability to research. The study programme is clearly set out in line with the Quality Assurance Agency for Higher Education's Framework for Higher Education qualification standards at Levels 4 and 5. This means that students who want to progress to Levels 5 or 6 study should feel well prepared.

The Pearson BTEC Higher Nationals meet these requirements by providing:

- a range of general and specialist study units, each with a clear purpose, so there is something to suit each student's choice of programme and future progression plans
- up-to-date content, closely in line with the needs of employers, professional bodies and higher education, for a skilled future workforce
- learning outcomes mapped against professional body standards, where appropriate
- support for tutors, including authorised assignment briefs, curriculum planning support and assessment guidance, and
- support for students, including digital learning resources and communities, through HN Global.

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1.5 HN Global

Our HN Global website provides a specially designed range of digital resources to give tutors and students the best possible experience during their BTEC Higher Nationals course. More information is available at: https://hnglobal.highernationals.com/.

1.6 Qualification titles

- Pearson BTEC Level 4 Higher National Certificate in Marketing Management for England

1.7 Qualification code

Ofqual Regulated Qualifications Framework (RQF) Qualification numbers:

- Pearson BTEC Level 4 Higher National Certificate in Marketing Management for England: **610/2680/3**

1.8 Awarding institution

Pearson Education Ltd.

1.9 Key features

Pearson BTEC Higher National qualifications offer the following:

- an exciting and informative study programme that stimulates and challenges students
- refreshed content that is closely aligned with occupational standard Level 4 Marketing Executive, professional body, employer, and higher education needs.
- core competencies throughout the curriculum, to support lifelong learning skills for personal and professional development
- the knowledge, skills and behaviours required for employment in roles, e.g. a Marketing Executive, Marketing Officer, Marketing Specialist, Marketing Communications
- the opportunity for centres to offer assessments that consider cognitive skills (what students know), along with effective and applied skills (how they behave and what they can do), to support a practical and dynamic approach to learning
- unit-specific assessment designed and Pearson-set theme to encourage thorough and analytical learning, challenge students and develop skills in critical thinking, personal responsibility and decision-making
- a flexible approach to assessment that supports progression to higher education or to work and which allows for different learning styles
- quality assurance measures that assure professional organisations, universities, businesses, colleges and students of the integrity and value of the qualifications, and
- a programme of learning designed to meet skills gaps in the current workforce and build today's talent to meet tomorrow's needs in an international environment.

1.10 Qualification frameworks

Pearson BTEC Higher National qualifications are recognised higher education qualifications in the UK. They are in line with the Framework for Higher Education Qualifications (FHEQ) in England, Wales and Northern Ireland, and Quality Assurance Agency (QAA) Subject Benchmark Statements, where applicable. These qualifications are part of the Regulated Qualifications Framework (RQF).

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1.11 Collaborative development

We are grateful to the university and further education tutors, employers, professional bodies, and others who have generously shared their time and expertise to help us develop the new Pearson BTEC Higher National Certificate in Marketing Management. Our thanks go to:

- Capgemini
- Kirklees College
- Lenovo
- Loughborough College
- Philip Morris
- School of Marketing
- Sunderland College
- Validis
- Wavemaker UK.

2.0 Programme purpose and objectives

2.1 Purpose

The purpose of these qualifications is to develop students as independent-thinking professionals who can meet the demands of employers and adapt to a constantly changing world. The qualifications aim to widen access to higher education and improve the career prospects of those who take them.

2.2 Objectives

The objectives of these qualifications are:

- to develop students' marketing management skills, knowledge and understanding to achieve high performance and deliver marketing activities to drive business
- to develop students with enquiring minds, that are tenacious and driven in approach to see projects through to completion and have an adaptable approach to meet changing work priorities
- to provide insight into marketing operations and the opportunities and challenges presented so that students can create, manage and maintain key marketing channels, including digital, offline and social media
- to develop students' understanding of the process of researching, developing, promoting and distributing, products or services through effective channels to engage with a range of target audiences
- to provide the knowledge, skills and behaviours required for a range of careers in a marketing or sales environment
- to develop student behaviours that are inclusive, agile and creative to enable students to strive for achievement at a high level of professionalism, reliability and dependability with a passion for the customer
- to offer a balance between employability skills, behaviours and knowledge essential for students with employment or academic ambitions.

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2.3 Aims of the Pearson BTEC Level 4 Higher National Certificate in Marketing Management

The Level 4 units lay the foundations of learning by providing a broad introduction to marketing and different marketing functions. This develops and strengthens core skills while preparing the student for study at Level 5 or to enter employment with the qualities necessary for job roles that require some personal responsibility. Students will gain a wide range of knowledge tied to practical skills gained through research, independent study, directed study and workplace scenarios. Students are involved in vocational activities that help them to develop vocational behaviours (the attitudes and approaches required for a competence and transferable skills). Transferable skills are those such as communication, teamwork, research and analysis, which are highly valued in higher education and the workplace.

By the end of Level 4, students will have sound knowledge of the basic concepts of marketing management. They will be competent in a range of subject-specific skills as well as general skills and qualities relevant to key areas of marketing. The Level 4 units have been specifically designed to give students the opportunity to gain knowledge, skills and behaviours aligned to the Occupational Standard (OS) for Marketing Executive at Level 4.

The units will prepare students to enter employment with the qualities and abilities necessary for roles that require personal responsibility and decision-making, and will support student that aspire to future roles in marketing including the following:

- Marketing Executive
- Marketing Officer
- Marketing and Communications Officer

2.4 Developing students' employability skills and academic study skills

Employability skills (sometimes referred to as transferable skills) are vital to increase students' career prospects and contribute to their personal development. Our BTEC Higher National Certificate in Marketing Management supports students in developing the key skills, qualities and strengths that employers are looking for.

We divide employability skills into five main categories.

Problem-solving skills

These include:

- critical thinking
- using expert and creative solutions to solve non-routine problems
- critical analysis and evaluation to support decision-making, and
- use of appropriate business systems and software to deliver marketing outcomes efficiently.

Independent skills

These include:

- self-management
- adaptability and resilience
- self-awareness
- willingness to learn from mistakes
- self-monitoring and self-development
- self-analysis, and
- reflection, planning and prioritising.

Interpersonal skills

These include:

- presenting and articulating the value and benefit of solutions for a specific customer
- effective communications, including ability to write and proofread clear and innovative copy, project briefs and give confident presentations
- working collaboratively and sharing good practice with a wide range of clients/stakeholders to support marketing outcomes, and
- effectively liaising with, and managing, internal and external stakeholders including suppliers to deliver required outcomes.

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Commercial skills

These include:

- understanding the characteristics and plans of the business and sector, including their vision and values
- understanding how marketing contributes to achieving wider business objectives
- understanding the target audience's decision-making process and how that can influence marketing activities
- understanding the principles of stakeholder management and customer relationship management
- the marketing landscape and how routes to market interplay e.g. franchise model, distribution, and
- using appropriate technologies to deliver marketing outcomes.

Business skills

These include:

- awareness of types of companies and legal structures, and
- sector-specific legal, regulatory and compliance frameworks within which they must work, including current Data Protection regulations.

Students also benefit from opportunities for deeper learning, where they can make connections between different study units and select areas of interest for detailed study. In this way, the BTEC Higher National Certificate in Marketing Management provides a vocational context in which students can develop the knowledge and academic study skills they need to progress to university degree courses.

These academic study skills include:

- active research
- effective writing
- analytical skills
- critical thinking
- creative problem solving
- decision-making, and
- using digital technology.

Students can also develop their academic skills through independent study modules and resources on the HN Global website: https://hnglobal.highernationals.com/.

2.4.1 Use of maths and English within the curriculum

Those working in the marketing sector cannot just rely on their technical skills, they must ensure that **all** their skills are relevant to increase their employment opportunities. They will be required to communicate appropriately with stakeholders throughout their career and the ability to use maths and English in a professional context is an essential employability skill that must be developed at all levels of study.

Development of essential maths and English skills are embedded in these qualifications in accordance with industry requirements. Examples of how these skills are developed in the BTEC Higher Nationals Curriculum are:

- written reports
- formal presentations
- informal conversations
- use of professional, sector-specific language, and
- interpreting and presenting financial statements.

Some aspects of this programme require maths skills, but students taking a BTEC Higher National in Marketing Management will only require specific maths skills in areas such as principles of finance and budgeting for projects.

We recommend that all students have a grade A* to C or 9 to 4 in GCSE Maths and English, before beginning a Higher National course.

2.5 What could these qualifications lead to?

The Level 4 Higher National Certificate provides a solid foundation in marketing, which students can build on if they decide to continue their studies.

Once students have achieved the Level 4 Higher National Certificate, they can develop their career in the respective sector by:

- entering employment
- continuing existing employment
- linking with the appropriate professional body
- committing to continuing professional development by undertaking a higher apprenticeship, or
- studying at university.

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2.5.1 Progression to university

The Level 4 Higher National Certificate is recognised by Higher Education providers as meeting admission requirements to progress to the second year of an undergraduate degree programme for many relevant courses, for example:

- BA (Hons) Business and Marketing
- BA (Hons) Marketing
- BA (Hons) International Marketing.

2.5.2 University recognition and articulations

We work with a range of higher education institutions around the world that accept Pearson BTEC Higher Nationals as a qualification for entry to their undergraduate degree courses. Many universities allow advanced entry to the second or third year of the course. Agreements can include transferring learning credits from one course or qualification to the other, articulation and case-by-case admission. An articulation agreement involves a university mapping the learning content of a Higher National against their degree programme(s). This process helps them understand how strong the alignment is between the Higher National and degree, and supports them in providing more guidance for learners during the admissions process.

Students should be aware that each university sets its own admission criteria and that those criteria can change. Before applying, students should understand the course entry requirements for the subject and year in which they want to study. For more information on entry requirements, please visit https://www.highernationals.com/degree-finder.

3.0 Preparing students for employment

3.1 Designing with employers, for employers

As a large employer and qualification-awarding organisation, Pearson understands the value of developing the skills and talent of the future workforce. We believe in, and champion, higher technical education that is relevant to employers.

We work with employers, students, professional bodies, education providers and other experts to design qualifications with the future workforce in mind. Higher National qualifications blend employability skills with academic, business and technical knowledge. They support trainees and apprentices in their Higher Apprenticeship and other technical education programmes, as well as students working towards a degree. We update our programmes regularly to maintain their high quality and meet the changing needs of the workforce.

Employers contribute to our Higher Nationals in several ways:

- They are involved in every stage of designing our qualifications, from developing the structure and pathways to selecting subjects, developing content and approving qualifications.
- They help us deliver qualifications, for example through vendor accreditation, letters of support and co-badging. Our qualifications actively encourage training providers to work with employers. Work placements and work-related learning are key features of BTEC Higher Nationals.
- They help us review and update our qualifications to meet occupational standards and provide supporting material such as case studies to reflect the real world of work.

We are committed to equipping apprentices, trainees and organisations with the tools and resources they need to support high-quality, innovative technical education and Higher Apprenticeship programmes.

Including a Higher National qualification as part of a Higher Apprenticeship or technical education programme gives students:

- an internationally recognised higher-level qualification in line with the Framework for Higher Education Qualifications, and
- a stepping-stone to continue their education or training and gain a recognised degree or professional qualification.

To find out more, and to access detailed mapping to higher apprenticeships and occupational standards for your qualification, please visit the following pages: https://qualifications.pearson.com/en/qualifications/apprenticeships.html and https://qualifications.pearson.com/en/qualifications/btec-higher-nationals/higher-nationals/higher-technical-qualifications.html on our website.

3.1.1 Employability skills and competencies for student career success

Pearson is committed to delivering learning that is rooted in the real world and to developing work-ready graduates with the professional skills and behaviours that employers need. The Pearson BTEC Higher National curriculum provides a clear line of sight to employment, depending on which specialist areas students complete. The aim is to produce students who are equipped to thrive in the changing world of work.

The table below gives an indication of the level of role that a student graduating at each educational level might expect to enter, and some examples of the competencies expected.

Levels of competency			
Employability level at learning level	**Level 4 Operational**	**Level 5 Managerial**	**Level 6 Professional**
General employment outcomes for graduates at each level	Graduates are able to perform key business functions and tasks, understand processes and operations. Work as effective skilled operatives.	Graduates are able to enhance business performance through strategic business planning to meet and fulfil business aims and objectives. They will have an understanding of managing business functions to work effectively in lower/middle management positions.	Graduates are able to formulate direction, take the lead and effectively manage change in middle management positions.
Typical employment roles in different business fields	Marketing Executive Marketing Officer Marketing and Communications Officer Content and copywriter	Marketing Director Creative Director Search Engine Optimisation (SEO) Strategist Digital Strategist	Marketing Manager Product Marketing Manager Digital Marketing Manager Social Media Manager

Table 1: Displaying levels of competency at employability level and examples of roles in different areas of Marketing Management at each level

3.1.2 Developing competencies for the workplace

Core competencies developed on the programme will support students in preparing for a range of employment opportunities that are aligned to the L4 Occupational Standard (OS) for Marketing Executive. These core competencies collectively summarise the key capabilities that are important for marketing or sales covering areas of relevant expertise and technical skills that would be required to perform a job successfully across multiple business sectors, as defined in current, advertised job vacancies.

Core competencies are developed on programme in a balanced framework of cognitive (knowledge), affective (behaviours) and psychomotor (practical) learning outcomes to encourage a more vocational and practical approach to learning. These have been mapped to the knowledge, skills, and behaviours (KSBs) for the L4 occupational standard for Marketing Executive (https://www.instituteforapprenticeships.org/apprenticeship-standards/operations-or-departmental-manager-v1-2).

A Marketing Executive will help shape, support and deliver marketing plans, working in conjunction with the Marketing Manager who will define the overall marketing strategy. A highly audience focused role which requires creativity, communication and project management skills – these individuals are responsible for planning and executing tactical and targeted marketing activity.

The table below shows how the core competencies developed on the Pearson BTEC Higher National Certificate in Marketing Management fit a typical job description for a Marketing Executive:

Marketing Executive	
Typical job description	**Skills gained on programme**
Managing and maintaining key marketing channels, including digital, offline and social media Planning and delivering tactical integrated marketing campaigns Managing the production and distribution of marketing materials Liaising and networking with a range of stakeholders including customers, colleagues, suppliers (including agencies) and partner organisations	Present a multi-media marketing communications plan for a specified product or service Design a marketing campaign using multimedia to optimise content that targets key audiences Co-ordinate a marketing campaign to an agreed deadline Produce a marketing plan for an organisation that meets marketing objectives Recommend appropriate control mechanisms to measure and monitor progress of an implemented marketing plan Produce appropriate content for a marketing channel that meets communication objectives Apply a range of interpersonal skills and different approaches to stakeholder and customer relationship management

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Marketing Executive	
Typical job description	**Skills gained on programme**
Collecting and analysing research information to understand target audience behaviour and views across the market in general and the marketing mix Assisting in the achievement of brand positioning to agreed guidelines	Work collaboratively within a team to share good practice for continuous improvement Collect market research data using a range of methods and techniques Apply techniques to interpret and analyse market research data Apply market segmentation within a B2B and B2C context to select appropriate target markets Create a marketing and sales funnel for a B2C context for an organisation

Table 2: Typical job description for a Marketing Executive

3.1.3 Professional body recognition and exemption

In developing the Pearson BTEC Higher National qualifications in Marketing Management, we have worked closely with:

- Digital Marketing Institute (DMI)
- The Chartered Institute of Marketing (CIM).

By aligning to professional body competency standards, content, and assessment supports student development as professional practitioners for the future. This adds value for students by offering them access to continuing professional development.

Types of professional body agreements for Higher Nationals

There are a variety of agreements that we can have in place with professional organisations, although note that not all of these will apply to all qualifications:

- **Professional accreditation:** where a specific study programme prepares students to register for a professional qualification. In some cases, completing the Higher National Certificate may be enough for students to receive the professional qualification.
- **Membership:** where students are offered student membership whilst studying, or progression onto membership upon completion of their qualification.
- **Recognition:** where a professional organisation recognises the value of a Higher National in preparing students for the industry.
- **Exemption:** professional organisations may also offer exemptions from units on some of their qualifications. This means that students completing these Higher National units will have covered the material required for those professional body units and can claim exemption when studying for the professional body qualification.

For the full accreditation and exemption details for this qualification, please refer to the Progression Hub on HN Global. (https://hnglobal.highernationals.com/progression-hub/memberships-certs) or on the Industry Engagement page https://qualifications.pearson.com/en/qualifications/btec-higher-nationals/business-2021/industry-engagement.html. We continuously work to update and add new agreements, therefore please refer to these online pages for the most up-to-date information.

4.0 Centre support

You can access a wide range of resources and support to help you deliver our Pearson BTEC Higher Nationals with confidence.

4.1 Specification

This specification gives you details of the administration of the qualifications and information on the units included in them.

4.2 HN Global

HN Global is a dedicated online learning platform for all Pearson BTEC Higher National students and delivery centres. You can find various free resources to support staff in delivering a Pearson BTEC Higher National programme and to guide students on their learning journey. The HN Global Forum connects students and tutors, and provides the opportunity to discuss common themes and to share good practice. HN Global also provides access to the following:

The Learning Zone includes student study materials such as core textbooks, study skills modules, a 'Progression hub' featuring opportunities to develop employability skills, an e-library and subject materials.

The Tutor Resources section hosts a wealth of delivery materials, reading lists, blended learning resources, video guidance on assessment and professional development opportunities. Staff can also access the Quality Assurance (QA) Hub for templates and more centre support.

Short Courses provides support for curriculum planning, developing schemes of work and developing students' academic skills.

These are available from the HN Global website at: https://hnglobal.highernationals.com/.

4.3 Authorised Assignment Briefs

We provide a booklet of Authorised Assignment Briefs (AABs) for a sample of units. These AABs have been developed to support centres with their assessment strategy for the delivery of a sample of units, as well as providing guidance and inspiration for effective planning and design of future Assignment Briefs.

They can be used in the following ways:

1. AABs ***can be modified and customised*** to meet local requirements.
2. AABs ***can be used off the shelf by centres if they meet your specific requirements***, following internal verification. They have been written to assess students' knowledge, understanding and skills specifically relevant to the unit Learning Outcomes but they have not been contextualised to meet local need and international diversity. Centres will still need to select and provide a relevant organisation.

In both cases ***the Assignment Brief should still be internally verified and made available for standards verification***.

AABs offer a range of real and simulated assessment activities, for example group work, to encourage cooperation and social skills or a solution-focused case study to develop cognitive skills. The assessment grids for each unit explain the specific requirements for assessing these skills. All assignments must be moderated in line with the internal verification process.

The *Tutor Resources* section on HN Global offers a wide range of resources and guidance documents to help you plan and design assessments effectively. Please see the Authorised Assignment Brief booklet on the subject page at https://hnglobal.highernationals.com/

4.4 Pearson English

Pearson provides a full range of support for English learning, including diagnostics, qualifications and learning resources. Please see: www.pearson.com/english

The Pearson English Portal also offers a variety of digital resources. The portal encourages users to get involved, improves teaching, and results, and increases the learning experience.

5.0 Planning your programme

5.1 Delivering Higher Nationals

As a large employer and qualification-awarding organisation, Pearson understands the value of developing the skills and talent of the future workforce. We believe in, and champion, higher technical education that is relevant to employers.

You play a central role in helping your students choose the right Pearson BTEC Higher National qualification.

Assess your students very carefully to make sure they take the right qualification and the right pathways and optional units. This will allow them to progress to the next stage in their learning or employment journey. You should also check the qualification structures and unit combinations carefully when giving students advice.

Make sure your students have access to a full range of information and advice to help them choose the right qualification and units. When students are recruited, you need to give them accurate information on the title and focus of the qualification they are studying for. Centres must provide a programme specification for approvals but it is also essential that centres produce:

- a staff handbook to support full- and part-time members of your team, and
- a student handbook to guide students through the course requirements so they know what is expected of them and understand their rights.

You can find more information in the *BTEC Higher Nationals Centre Guide to Quality Assurance and Assessment* handbook, available to download on our website: https://qualifications.pearson.com/en/qualifications/btec-higher-nationals/about/quality-assurance-process.html.

5.1.1 Centre approval

We need to approve all centres before they can offer our qualifications. This is to make sure that centres are ready to assess students and that we can provide the support you need.

For more information about becoming a centre and gaining approval to run our qualifications, please see 'Centre/Qualification approvals' in the support section of our website at: https://support.pearson.com/uk/s/article/Centre-Qualification-Approvals.

5.1.2 Tutor knowledge

Pearson does not currently explicitly stipulate any qualification or experience requirements for staff involved in the delivery, assessment and internal verification of BTEC higher education qualifications. This is because it would not be practical to impose such stipulations to cover the very wide range of subject areas and field of experience that the BTEC higher education qualifications encompass.

However, it is expected that centres recruit all delivery, assessment and internal verification staff with integrity; and have robust staff recruitment processes in place. It is expected that staff hold a nationally recognised qualification at or above the level of the qualification being delivered and/or equivalent relevant experience.

You can find more information in the *BTEC Higher Nationals Centre Guide to Quality Assurance and Assessment handbook, available to download* on our website: https://qualifications.pearson.com/en/qualifications/btec-higher-nationals/about/quality-assurance-process.html.

5.1.3 Resources

As part of your centre approval, you will need to show that the right resources and workspaces are available to deliver Pearson BTEC Higher Nationals. Some units need specific resources. This is clearly explained in the unit descriptions, where appropriate.

5.1.4 Delivering learning

With our approval, you can deliver our Pearson BTEC Higher Nationals using a mixture of learning options that meet your students' needs. We recommend you offer full-time, part-time, blended learning and distance learning modes of delivery.

If you are delivering distance learning, please see the *Pearson distance learning and assessment policy* available to download at: https://qualifications.pearson.com/en/support/support-topics/understanding-our-qualifications/policies-for-centres-learners-and-employees.html.

5.1.5 Support from Pearson

For each programme with active registrations, we will provide an external examiner to help you plan and review assessments. You will also be able to access training events and support from a dedicated team of Pearson Higher National subject leads. Please see: https://qualifications.pearson.com/en/support/training-from-pearson-uk.html.

5.2 Entry requirements and admissions

Pearson does not set formal entry requirements for our qualifications but, as a centre, you are responsible for making sure that the students you recruit have a reasonable chance of success on the programme.

Students who have recently been in education are likely to need:

- a BTEC Level 3 qualification in Business
- a GCE Advanced Level profile that demonstrates strong performance in a relevant subject or adequate performance in more than one GCE subject. This profile is likely to be supported by GCSE grades at 9 to 4 (or equivalent) and/or A* to C (or equivalent) in subjects such as maths and English
- other related Level 3 qualifications
- an Access to Higher Education Diploma from an approved further education institution
- relevant work experience, or
- an international equivalent to the above qualifications.

Our Recognition of Prior Learning policy means that students' previous learning and experience can be taken into account and they may be awarded certain qualifications or units of a qualification based on that learning or experience. Please see *Section 9* for more information.

5.2.1 English language requirements

Pearson's mission is to help people make more of their lives through learning.

To assist centres to recruit students who have the skills to benefit from undertaking a Higher National programme of study, we are providing the following clarification regarding the English language **admission requirements** when offering places to applicants.

All centres delivering Pearson BTEC Higher National qualifications in English must ensure that each applicant can demonstrate their capability to learn and be assessed at the relevant level in English.

Students applying for a Pearson BTEC Higher National qualification that is **taught and assessed completely in English** will need a certain level of English language skills.

Before accepting students onto a programme, you must make sure that those who are non-native English speakers and who have not carried out their final two years of schooling in English can demonstrate ability at a standard equivalent to:

- Common European Framework of Reference (CEFR) level **B2**
- Pearson Test of English (PTE) Academic **51**
- International English Language Testing System (IELTS) **5.5** (reading and writing must be at **5.5**).

Students who have completed a Pearson BTEC Higher National qualification delivered partly or completely in another language but assessed in English will need to demonstrate ability in English to the standard above but at the **end** of the programme.

It is up to you to decide what proof of ability students will need to provide.

5.3 Access to study

This section focuses on the administration you will need to carry out when delivering our Pearson BTEC Higher National qualifications. It will be most relevant to quality controllers, programme leaders and examinations officers.

Our qualifications should:

- be available to everyone able to reach the required standards
- be free from any barriers that restrict access and progress, and
- provide equal opportunities for all those who want to access the qualifications.

For more information, please see our *Equity, diversity and inclusion in Pearson qualifications and related services policy*, available at: https://qualifications.pearson.com/en/support/support-topics/understanding-our-qualifications/policies-for-centres-learners-and-employees.html.

Please recruit with integrity when registering students to our Pearson BTEC Higher National programmes. You should:

- make sure that students applying have the information and advice they need about the qualification to be sure it meets their needs
- check each student's qualifications and experience to make sure they have the potential to achieve the qualification, and
- for students with disabilities and specific needs, consider the support available to them during teaching and assessment. For more guidance, please see *Section 5.6.2* on reasonable adjustments.

5.4 Student registration and entry

All students should be registered on the qualification they are studying and suitable arrangements need to be made for internal and external verification. For information on making registrations, please see the information manual available in the support section of our website at: https://qualifications.pearson.com/en/support/support-for-you/exam-officers-administrators/entries-information-manual.html?view=manual.

Students can be formally assessed only for a qualification on which they are registered. If a student changes the qualification they want to study for (for example if they decide to choose a different specialist pathway), you must transfer their registration to the new pathway. We cannot sample a student's work unless they are registered on the correct pathway.

5.5 Access to assessments

Assessments need to be managed carefully so that all students are treated fairly and that results and certificates are published without delay.

Our equity, diversity and inclusion policy requires that:

- all students have an equal opportunity to access our qualifications and assessments, and
- our qualifications are awarded in a way that is fair to every student.

We are committed to making sure that:

- students with a protected characteristic as defined by law (for example race, sexuality, religious belief) are not disadvantaged in comparison to students who do not share that characteristic
- all students achieve the recognition they deserve for taking a qualification, and this achievement can be compared fairly to the achievement of their peers.

For more information on access arrangements, please visit the Joint Council for Qualifications (JCQ) website at: https://www.jcq.org.uk/exams-office/access-arrangements-and-special-consideration/.

5.6 Administrative arrangements for internal assessment

5.6.1 Records

You are required to retain records of assessment for each student. Records should include assessments taken, decisions reached and any adjustments or appeals. Further information on quality and assessment can be found in our UK and international guides available in the support section on our website: https://qualifications.pearson.com/en/qualifications/btec-higher-nationals/about/quality-assurance-process.html. We may ask to audit your records, so they must be retained as specified. All student work must be retained for **a minimum of 12 weeks** after certification has taken place.

5.6.2 Reasonable adjustments to assessment

A reasonable adjustment is one that is made before a student takes an assessment, to ensure that they have fair access to demonstrate the requirements of the assessments.

You are able to make adjustments to internal assessments to take account of the needs of individual students. In most cases this can be achieved through a defined time extension or by adjusting the format of evidence. We can advise you if you are uncertain as to whether an adjustment is fair and reasonable. You need to plan for time to make adjustments, if necessary.

Further details on how to make adjustments for students with protected characteristics are available in the support section of our website: https://qualifications.pearson.com/en/support/support-topics/understanding-our-qualifications/policies-for-centres-learners-and-employees.html.

5.6.3 Special consideration

Special consideration is given after an assessment has taken place for students who have been affected by adverse circumstances, such as illness, and require an adjustment of grade to reflect normal level of attainment. You must operate special consideration in line with Pearson policy. You can provide special consideration related to the period of time given for evidence to be provided, or for the format of the assessment (if it is equally valid). You may not substitute alternative forms of evidence to that required in a unit, or omit the application of any assessment criteria to judge attainment. Pearson can consider applications for special consideration in line with the JCQ guide to the special consideration process, which can be downloaded from the JCQ website: https://www.jcq.org.uk/exams-office/access-arrangements-and-special-consideration/regulations-and-guidance/.

Please note that your centre must have a policy for dealing with mitigating circumstances if students are affected by adverse circumstances, such as illness, which result in non-submission or late submission of assessment.

5.6.4 Appeals against assessment

Your centre must have a policy for dealing with appeals from students. These appeals may relate to assessment decisions being incorrect or assessment not being conducted fairly. The first step in such a policy could be a consideration of the evidence by a programme leader or other member of the programme team. The assessment plan should allow time for potential appeals after assessment decisions have been given to students. If there is an appeal by a student, you must document the appeal and its resolution. Students have a final right of appeal to Pearson, but only if the procedures that you have put in place have been followed.

Further details of our policy on enquiries and appeals are available in the support section of our website: https://qualifications.pearson.com/en/support/support-topics/understanding-our-qualifications/policies-for-centres-learners-and-employees.html/ and can be downloaded from the JCQ website: https://www.jcq.org.uk/exams-office/access-arrangements-and-special-consideration/.

If your centre is located in England or Wales and the student is still dissatisfied with the final outcome of their appeal, they can make a further appeal to the Office of the Independent Adjudicator (OIA) by emailing: enquiries@oiahe.org.uk. In Northern Ireland a further appeal may be lodged with the Northern Ireland Public Service Ombudsman (NIPSO) by emailing: nipso@nipso.org.uk.

5.7 Dealing with malpractice in assessment

'Malpractice' refers to acts that undermine the integrity and validity of assessment, the certification of qualifications and/or may damage the authority of those responsible for delivering the assessment and certification.

Pearson does not tolerate actual or attempted actions of malpractice by learners, centre staff or centres in connection with Pearson qualifications. Pearson may impose penalties and/or sanctions on learners, centre staff or centres where malpractice or attempted malpractice has been proven.

Malpractice may occur or be suspected in relation to any unit or type of assessment within a qualification. For further details on malpractice and advice on preventing malpractice by learners, please see Pearson's *Centre guidance: dealing with malpractice and maladministration*, available to download on our website: https://qualifications.pearson.com/en/support/support-topics/understanding-our-qualifications/policies-for-centres-learners-and-employees.html.

Centres are required to take steps to prevent malpractice and to investigate instances of suspected malpractice. Learners must be given information that explains what malpractice is for internal assessment and how suspected incidents will be dealt with by the centre. The *Centre guidance: dealing with malpractice and maladministration* document gives full information on the actions we expect you to take.

Pearson may conduct investigations if we believe a centre is failing to conduct internal assessment according to our policies. The malpractice guidance document gives further information and examples, and details the penalties and sanctions that may be imposed.

In the interests of learners and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

5.7.1 Student malpractice

The Heads of Centres are required to report incidents of suspected student malpractice that occur during Pearson qualifications. We ask centres to complete a *JCQ Form M1* available to download at: www.jcq.org.uk/malpractice and email it with any accompanying documents (signed statements from the student and invigilator, copies of evidence etc.) to the Investigations Processing team at: candidatemalpractice@pearson.com. The responsibility for determining appropriate sanctions or penalties to be imposed on students lies with Pearson.

Students must be informed at the earliest opportunity of the specific allegation and the centre's malpractice policy, including the right of appeal. Students found guilty of malpractice may be disqualified from the qualification for which they have been entered with Pearson.

Failure to report malpractice constitutes staff or centre malpractice.

5.7.2 Tutor and centre malpractice

Heads of Centres are required to inform Pearson's Investigations Processing team of any incident of suspected malpractice (which includes maladministration) by centre staff, before any investigation is undertaken. The Heads of Centres are requested to inform the investigations team by submitting a *JCQ Form M2* (downloadable from: www.jcq.org.uk/malpractice) with supporting documentation to: pqsmalpractice@pearson.com. Where Pearson receives allegations of malpractice from other sources (for example Pearson staff, anonymous informants), the investigations team will conduct the investigation directly or may ask the Head of Centre to assist.

Pearson reserves the right in cases of suspected malpractice to withhold the issuing of results/certificates while an investigation is in progress. Depending on the outcome of the investigation, results and/or certificates may not be released or they may be withheld.

We reserve the right to withhold certification when undertaking investigations, audits and quality assurance processes. You will be notified within a reasonable period of time if this occurs.

5.7.3 Sanctions and appeals

Where malpractice is proven, we may impose sanctions or penalties, such as:

- mark reduction for affected external assessments
- disqualification from the qualification, or
- debarment from registration for Pearson qualifications for a period of time.

If we are concerned about your centre's quality procedures, we may impose sanctions such as:

- working with centres to create an improvement action plan
- requiring staff members to receive further training
- placing temporary suspensions on certification of learners
- placing temporary suspensions on registration of learners
- debarring staff members or the centre from delivering Pearson qualifications, or
- suspending or withdrawing centre approval status.

The centre will be notified if any of these apply.

Pearson has established procedures for considering appeals against penalties and sanctions arising from malpractice. Appeals against a decision made by Pearson will normally be accepted only from the head of centre (on behalf of learners and/or members of staff) and from individual members (in respect of a decision taken against them personally). Further information on appeals can be found in the JCQ Appeals booklet available to download at: https://www.jcq.org.uk/exams-office/appeals.

6.0 Programme structure

6.1 Units, credits and Total Qualification Time (TQT)

The Higher National Certificate (HNC) is a Level 4 qualification made up of 120 credits. It is usually studied full time over one year, or part time over two years.

Each unit carries 15 credits. Units are designed around the amount of time it will take for a student to complete them and receive a qualification. This is known as the total qualification time (TQT). TQT includes guided learning activities, directed learning activities and assessment. Each 15-credit unit has a TQT of 150 hours – 60 guided learning hours (GLH) and 90 hours of independent learning hours (ILH).
(More information about guided and independent learning is given below.)

- **The total qualification time for Higher National Certificate (HNC) = 1,200 hours.**

Examples of activities that can contribute to TQT include:

- guided learning
- independent and unsupervised research and learning
- unsupervised creation of a portfolio of work experience
- unsupervised e-learning
- unsupervised e-assessments
- unsupervised coursework
- watching a recorded podcast or webinar
- unsupervised work-based learning.

6.1.1 Guided learning hours

These are the hours where a tutor is present to give specific guidance towards the learning aim being studied. Guided learning hours include lectures, tutorials, and supervised study in, for example, open learning centres and learning workshops. They also include supervised assessment activities such as invigilated exams, observed assessments and observed work-based practice.

- **The total guided learning hours for Higher National Certificate (HNC) = 480 hours.**

Some examples of activities that can contribute to guided learning include:

- classroom-based learning supervised by a tutor
- work-based learning supervised by a tutor
- a live webinar or telephone tutorial with a tutor

- live e-learning supervised by a tutor, and
- all forms of assessment guided or supervised at the time by a tutor or other education or training provider. This includes where the assessment is competence-based and turned into a learning opportunity.

6.1.2 Independent learning hours

These are the hours where a student is learning without the direct guidance of a member of centre staff. They are critical to the student's ability to develop knowledge and skills, as well as providing them with the opportunity to develop key transferable skills, e.g. self-discipline, time management and self-motivation.

- **The total independent learning hours for Higher National Certificate (HNC) = 720 hours.**

Some examples of activities that can contribute to independent learning include:

- self-directed research and investigation
- reading set texts or other sources of information
- watching subject-related videos as part of investigation and research
- reviewing recordings of scheduled sessions or notes from those sessions
- peer activities, e.g. group meetings and online discussions, where students explore their learning together
- reviewing and recording thoughts on their own learning.

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6.2 Programme structures

Programme structures specify:

- the total credit value of the qualification
- the minimum credit to be achieved at the level of the qualification
- the core units required.

6.2.1 Pearson BTEC Level 4 Higher National Certificate in Marketing Management

- Requires at least 120 credits = 8 units, each with a value of 15 credits.
- Total qualification time = 1,200 hours.
- Total guided learning hours = 480 hours.
- All units are at Level 4.

Pearson BTEC Level 4 Higher National Certificate in Marketing Management			
Unit type	**Unit**	**Credits**	**Level**
Core *Mandatory*	Unit 1: The marketing and sales environment	15	4
Core *Mandatory*	Unit 2: Principles of marketing and sales	15	4
Core *Mandatory*	Unit 3: Market research and techniques (Pearson-set)	15	4
Core *Mandatory*	Unit 4: Managing customers	15	4
Core *Mandatory*	Unit 5: Business skills and communications	15	4
Core *Mandatory*	Unit 6: Products, content and multi channels	15	4
Core *Mandatory*	Unit 7: Marketing strategy and planning	15	4
Core *Mandatory*	Unit 8: Managing marketing and digital communication	15	4

Table 3: Programme structures overview for Pearson BTEC Level 4 Higher National Certificate in Marketing Management

6.3 Pearson-set units

Pearson-set units form part of the programme structure. Each year, Pearson will decide on a theme and (for Level 4) a set of topics related to that theme.

It is a formal requirement that you must:

- apply the theme to Level 4 and select a topic at Level 4, and
- develop an assignment, to be internally assessed, to involve students in work related to the theme.

Example

Theme: 'Sustainable marketing to create a competitive advantage'.

Level 4 topics:

- The concept of sustainable marketing for delivering value to customers
- Best practices for sustainable marketing practice

You will find full support in the Pearson-set Assignment Guidance for the units, and the theme and topic release documentation, which will be provided for each level.

The Pearson-set unit provides a common framework for centres to develop work that will allow us to:

- compare information across the sector, and
- identify and share best practice in higher education teaching and learning.

We will share the best practice results with all centres.

For more information about assessing Pearson-set units, please see *Section 7*.

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6.4 Unit descriptor example

The unit descriptor is how we define the individual units of study that make up a Higher National qualification. Students will complete the units included in the programme that you offer at your centre.

You can use any of the unit descriptors listed in *Section 11*. We have described each part of the unit as follows.

Unit title	A general statement of what the unit will cover.
Unit code	The Ofqual unit code.
Unit type	• Core Mandatory Unit
Unit level	All our Pearson BTEC Higher National units are at Level 4
Credit value	The credit value relates to the total qualification time (TQT) and unit learning hours (ULH). It is easy to calculate: • 1 credit = 10 ULH, so • 15 credits = 150 ULH. To complete a Higher National Certificate, students must achieve all the credits required.
Introduction	Some general notes on the unit: • setting the scene • stating the purpose, and • outlining the topics and skills gained through the unit.
Learning Outcomes	These clearly explain what students will be able to do after completing the unit. There are usually four Learning Outcomes for each unit.
Essential content	This section covers the content that students can expect to study as they work towards achieving their Learning Outcomes.
Learning Outcomes and Assessment Criteria	Tutors can refer to this table when grading assignments. The table connects the unit's Learning Outcomes with the student's work. Assignments can be graded at 'Pass' (P), 'Merit' (M) and 'Distinction' (D), depending on the quality of the student's work.
Recommended resources	Lists the resources that students should use to support their study for the unit. It includes books, journals, and online material. The programme tutor may also suggest resources, particularly for local information.

Table 4: Unit descriptor description

6.4.1 Web resources – referencing

Some units have web resources as part of their Recommended Resources list. Hyperlinking to these resources directly can cause problems, as their locations and addresses may change. To avoid this problem we only link to the main page of the website and signpost students and tutors to the section where the resource can be found. Thereby, we have referenced web resources as follows:

[1] A link to the main page of the website

[2] The title of the site

[3] The section of the website where the resource can be found

[4] The type of resource it is, for example:

- research
- general reference
- tutorials
- training
- e-books
- report
- wiki
- article
- datasets
- development tool
- discussion forum.

Examples

[1] www.marketingweek.com

[2] Marketing Week

[3] New and industry articles

[4] (General reference)

Students and tutors must use a referencing system to cite and reference resources in an academic format.

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7.0 Assessment

Pearson BTEC Higher Nationals are assessed using a combination of:

- centre-developed internal assignments that are set and assessed by centres, and
- Pearson-set assignments, which are set by centres in line with our guidelines and graded by centres.

Pearson-set units are mandatory and target industry-specific skills.

For the HNC, centres will internally assess one compulsory Pearson-set unit targeted at particular skills. This is a Level 4 core unit carrying 15 credits.

All other units are assessed through internal assignments set by the centre.

7.1 Principles of internal assessment

This section summarises the main features of internal assessment and explains how you can offer it effectively. Full details are given in the *BTEC Higher Nationals Centre Guide to Quality Assurance and Assessment*, available on the enhanced Quality Assurance section of our website at: https://qualifications.pearson.com/en/qualifications/btec-higher-nationals/about/quality-assurance-process.html. All your assessment team will need to refer to this document.

For Pearson BTEC Higher Nationals, you must meet the expectations of stakeholders and the needs of students by providing a programme that is practical and applied. You can tailor programmes to meet local needs and should use links with local employers and the wider business sector.

Effective internal assessment is challenging, engaging, practical and up to date. It must also be fair to all students and meet national standards.

7.1.1 Assessment through assignments

For internally assessed units, assessment takes the form of an assignment carried out after the unit (or part of the unit if several assignments are used) has been delivered. An assignment may take a variety of forms, including practical and written. It is a distinct activity completed independently by students (alone or in a team). It is separate from teaching, practice, exploration and other activities that students complete with direction from tutors.

Students should receive each assignment as an Assignment Brief with a hand-out date, a completion date and clear requirements for the evidence they must provide. There may also be specific practical activities, which the student must complete under tutor observation as part of the assignment. Assignments can be divided into separate parts and may require several forms of evidence. A valid assignment will enable a clear and formal assessment grade based on the assessment criteria.

7.1.2 Using unit-based criteria

You must base your assessment decisions for Pearson BTEC Higher Nationals on the specific criteria we have provided for each unit and grade level. We have based these criteria on a framework to make sure that standards are consistent in the qualification and across the whole range of qualifications. We have developed each unit to assess the student's understanding, practical skills and the vocational qualities necessary for the qualification.

The assessment criteria for a unit are based on a hierarchy. For example, if a Merit criterion requires the student to show 'analysis' and the related Pass criterion requires the student to 'explain', then to gain a Merit the student will need to cover both 'explain' and 'analyse'. The unit assessment grid shows the relationships among the criteria so that assessors can apply all the criteria to the student's evidence at the same time.

Assessors must show how they have reached their decisions using the criteria in the assessment records. When a student has completed all the assessments for a unit, the assessment team can give a grade for the unit. This grade is based on the highest level the student is judged to have met for all the criteria.

- To achieve a Pass, a student must have met all the Pass criteria for the Learning Outcomes, demonstrating that they have covered the unit content and achieved Level 4 or 5 of the national framework.
- To achieve a Merit, a student must have met all the Merit criteria (and the Pass criteria) through high performance in each Learning Outcome.
- To achieve a Distinction, a student must have met all the Distinction criteria (and the Pass and Merit criteria), demonstrating outstanding performance across the whole unit.

A Pass cannot be awarded just because the student has completed all the assignments. Students must meet all of the Pass criteria. If they do not, their grade should be reported as 'unclassified'.

7.1.3 The assessment team

You will need an effective team for internal assessment. There are three key roles involved, each with different responsibilities. These roles are listed below.

- The **programme leader** is responsible for the programme, its assessment and internal monitoring to meet our requirements. They must register with us each year. They are also responsible for:
  - record keeping
  - liaising with the standards verifier
  - acting as an assessor
  - supporting the rest of the assessment team
  - making sure that the team has the information it needs about our assessment requirements
  - organising training, and
  - using our guidance and support materials.

- **Internal verifiers** oversee all assessment activity with the programme leader. They check that assignments and assessment decisions are valid and meet our requirements. All internal verifiers will follow the same standards and procedures as instructed by your programme leader. Internal verifiers are usually also assessors, but they do not verify their own assessments.
- **Assessors** set assignments or use assignments to assess students to national standards. Before taking any assessment decisions, they are trained by the programme leader to all work to the same standards and procedures. They also work with the programme leader and internal verifiers to make sure the assessment is planned and carried out in line with our requirements.

Our external examiner will sample student work across your assessors. They will also want to see evidence of how you have verified assignments and assess your decisions.

Full information is provided in the *BTEC Higher Nationals Centre Guide to Quality Assurance and Assessment*, available in the enhanced quality assurance section of our website: https://qualifications.pearson.com/en/qualifications/btec-higher-nationals/about/quality-assurance-process.html.

7.1.4 Effective organisation

Internal assessment needs to be well organised so that you can track student progress and so that we can make sure your assessments are in line with national standards. It is particularly important that you manage the overall assignment programme and deadlines to make sure that all your students can complete their assignments on time.

When developing an overall plan for delivering and assessing your programme, you will need to consider:

- the order in which you deliver units
- whether delivery will take place over short or long periods of time, and
- when assessment can take place.

We support you in this through:

- assessment and feedback guidance documents available on HN Global, and
- training materials and sample templates for curriculum planning.

Please see also *BTEC Higher Nationals Centre Guide to Quality Assurance and Assessment*, available in the enhanced quality assurance section of our website: https://qualifications.pearson.com/en/qualifications/btec-higher-nationals/about/quality-assurance-process.html.

7.1.5 Preparing students

You need to make sure that your students understand their responsibilities for assessment and the centre's arrangements. From induction onwards, you will want to make sure that students are motivated to work consistently and independently to achieve their qualifications. They need to understand:

- how assignments are used
- the importance of meeting assignment submission deadlines, and
- that all the work submitted for assessment must be their own.

To support them, you should provide a guide that explains:

- how you use assignments for assessment
- how assignments relate to the teaching programme
- how to use and reference source materials, including how to avoid plagiarism, and
- your centre's approach to assessments, for example how students must submit assignments, what happens if they submit late work, how they can request an extended deadline in special circumstances.

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7.2 Making valid assessment decisions

7.2.1 Authentic student work

An assessor must assess only student work that is authentic – in other words, the student's own independent work. Students must sign a declaration for each assessment to confirm that it is their own work. This declaration must confirm that:

- any evidence submitted for the assignment is the student's own, and
- the student understands that if this is not the case, they may face penalties for malpractice.

Assessors must make sure that evidence is authentic by setting valid assignments and supervising students during the assessment period. Assessors must also take care not to provide direct input, instructions or specific feedback that may influence the student's work and final grade.

You can use Pearson templates or your own templates to document authentication.

If your assessor suspects that a student's evidence is not authentic, they must take action in line with our policies for malpractice. Please see *Section 5.7* for more information.

7.2.2 Making assessment decisions using criteria

Assessors must use our criteria to make assessment decisions. They can judge the evidence from a student using all the relevant criteria at the same time but they must be satisfied that there is enough detailed evidence for each criterion required. For example, including a concluding section may not be enough evidence to meet the criterion requiring 'evaluation'.

Assessors should use the information and support available to help them reach their decisions. This includes:

- examples of moderated assessed work, and
- their programme leader and assessment team's experience.

7.2.3 Dealing with late assignments

For assessment to be fair, it is important that students are all assessed in the same way and that some students are not given an advantage by having extra time or the opportunity to learn from others. You should develop and publish your own regulations on late assignments and circumstances where you may agree to an extension.

Students must understand your policy on completing assignments by the deadlines you give them. You may agree to extend a deadline for a genuine reason such as illness in line with your centre policies. Please see *Section 5.6* for more information.

You can apply a penalty to assignments that are submitted late. To do this, you should:

- assess the assignment normally
- apply the penalty or cap to the grade awarded
- tell the student their uncapped grade to recognise the learning they have achieved and provide genuine assessment feedback
- record both the uncapped and capped grades, and
- have both grades verified by a suitable assessment board, taking into account any genuine reasons for the assignment being late.

Please also see the *BTEC Higher Nationals Centre Guide for Quality Assurance and Assessment*, which can be found on our website: https://qualifications.pearson.com/en/qualifications/btec-higher-nationals/about/quality-assurance-process.html.

7.2.4 Providing assessment decisions and feedback

Once your assessment team has completed the assessment process for an assignment, they will provide a formal assessment decision. This should be recorded formally and reported to the student. The information given to the student:

- must show the formal decision and how it has been reached, including how assessment criteria have been met
- may show why they have not demonstrated achievement against assessment criteria
- must not provide feedback on how to improve evidence, and
- may provide feedback on how to improve in the future.

7.2.5 The opportunity to resubmit an assignment

If a student's assignment does not pass after the first assessment, they must have the opportunity to resubmit the assignment for reassessment. In this case:

- students can have the assignment reassessed once only
- if coursework and project-based or portfolio-based assignments need to be reassessed, this will usually involve carrying out the original activity again
- for examinations, reassessment will involve completing a new activity
- the grade for a reassessed assignment will be capped at a Pass, and
- assignments already graded at a pass or higher cannot be reassessed.

7.2.6 Repeat units

If a student fails to achieve a Pass for a unit following reassessment, your assessment board may agree that they can repeat the unit. In this case:

- the student must pay the unit fee and study the unit again, with full attendance, and
- the grade for the unit (if successfully completed) will be capped at a Pass.

Students can repeat a unit once only.

7.2.7 Assessment boards

It is a formal Pearson requirement that centres hold an assessment board for all your Pearson BTEC Higher National programmes. The main purpose of an assessment board is to make recommendations on:

- the grades achieved by students on the units
- extenuating circumstances
- cases of cheating and plagiarism
- students progressing to the next stage of the programme
- the awards to be made to students, and
- students resubmitting assignments and repeating units.

Assessment boards may also monitor academic standards. The main board meetings normally take place at the end of the session, but if your centre operates on a semester system there may be meetings at the end of the first semester. There may also be separate meetings to deal with referrals.

If you do not have an assessment board, our external examiner will discuss this with your quality nominee and programme leader. Assessment board reports and minutes provide valuable evidence of your quality assurance processes.

7.3 Planning and record keeping

For internal processes to be effective, your assessment team needs to be well organised and keep effective records. We will work closely with you to make sure you are meeting national standards. This process gives stakeholders confidence in your assessment approach.

Your programme leader must have an assessment plan, produced as a spreadsheet. This plan should include:

- the time required to train the assessment team and make sure they are working to the same standards and procedures
- the time available for teaching and carrying out assessments, including when students may complete assessments and when quality assurance will take place
- the completion dates for different assignments
- who is acting as internal verifier for each assignment and the date by which the assignment needs to be verified
- a procedure for internal verifiers to sample assessors' decisions that covers all assignments, assessors and a range of students
- a process to assess and verify students' work so that they receive formal decisions quickly, and
- a system for scheduling resubmissions.

The programme leader must also keep records of all assessments carried out. The key records are:

- checking of assignment briefs
- student declarations
- assessor decisions on assignments, with feedback given to students, and
- confirmation of assessment decisions.

Examples of records and more information are available in the *BTEC Higher Nationals Centre Guide to Quality Assurance and Assessment*, available in the enhanced quality assurance process section of our website: https://qualifications.pearson.com/en/qualifications/btec-higher-nationals/about/quality-assurance-process.html.

7.4 Calculating the final qualification grade

7.4.1 Conditions for the award

7.4.1.1 Conditions for awarding our HNC

To achieve our Pearson BTEC Level 4 Higher National Certificate qualification, a student must have:

- completed units equivalent to 120 credits at Level 4, and
- achieved at least a Pass in 105 credits at Level 4.

7.4.2 Compensation

7.4.2.1 Compensation for the HNC

Students who have attempted but not achieved a Pass in one of their Level 4, 15-credit units can still be awarded an HNC as long as they have completed and passed the remaining units.

7.4.3 Calculating the overall qualification grade

A student's overall qualification grade is based on their performance in all units. They are awarded a Pass, Merit or Distinction using the points gained through all 120 credits, at Level 4 for the HNC.

Students must have attempted all units in a valid combination for each qualification. The conditions of award and compensation arrangements will apply as explained above. If a student has been granted compensation for a unit attempted but not achieved, that unit will appear as unclassified (a 'U' grade) on the notification of performance provided with their certificate.

7.4.3.1 Points per credit

Grade	Points
Pass	4
Merit	6
Distinction	8

Table 5: Points per credit for the BTEC Level 4 Higher National Certificate in Marketing Management

7.4.3.2 Point boundaries

Grade	Point boundaries
Pass	420–599
Merit	600–839
Distinction	840 +

Table 6: Points boundaries for the BTEC Level 4 Higher National Certificate in Marketing Management

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7.4.4 Modelled student outcomes

7.4.4.1 Pearson BTEC Level 4 Higher National Certificate

	Credits	Level		Student 1		Student 2		Student 3		Student 4		Student 5	
			Grade point	Grade	Unit points	Grade	Unit points	Grade	Unit points	Grade	Unit points	Grade	Unit points
Core 1	15	4	4	P	60	P	60	P	60	D	120	D	120
Core 2	15	4	4	P	60	P	60	P	60	D	120	M	90
Core 3	15	4	4	P	60	P	60	P	60	D	120	M	90
Core 4	15	4	4	P	60	P	60	M	90	M	90	M	90
Core 5	15	4	6	M	90	P	60	M	90	M	90	M	90
Core 6	15	4	6	M	90	P	60	M	90	M	90	M	90
Core 7	15	4	6	M	90	M	90	D	120	D	120	D	120
Core 8	15	4	6	M	90	M	90	D	120	D	120	D	120
Total	120				600		540		690		870		810
Grade					M		P		M		D		M

Key: Optional (Opt)

Table 7: Displaying example model outcomes

Note: The table above is provided as general examples of using unit grades to calculate qualification grades. They do not reflect the specifics of this qualification.

8.0 Quality assurance

The quality assurance system for all Pearson BTEC Higher National programmes is linked to Level 4 and Level 5 of the Quality Assurance Agency (QAA) Framework for Higher Education Qualifications (FHEQ). This means that centres have effective quality assurance processes to review their programme delivery. It also means that assessment grades are in line with national standards.

The quality assurance process for centres offering our Pearson BTEC Higher National programmes has five main features:

1. The approval process.
2. Monitoring internal systems.
3. Independent review of assessments.
4. Annual programme monitoring report.
5. Annual student survey.

8.1 The approval process

If you want to deliver our programmes at your centre, you must apply first through the existing centre approval process and then through the programme approval process. We can consider your application by:

- carrying out a desk-based review, or
- visiting your centre.

You will need to provide evidence that your centre:

- has the human and physical resources needed to deliver and assess the programme effectively
- understands the rules of independent assessment and agrees to follow them
- has a strong internal assessment system supported by 'fit for purpose' assessment documentation, and
- has a system to internally verify assessment decisions so that they are consistent across all assessors and sites.

Your application must be supported by the Head of the Centre (your principal or chief executive). It must include a declaration that you will operate the programmes strictly and in line with our requirements.

If your centre is already approved and you want to renew approval, you may be able to use our automatic approval process.

We may withdraw qualification or centre approval if we believe you can no longer quality assure your programme delivery or assessment standards.

8.2 Centre and qualification approval

As part of the approval process, your centre must meet the conditions listed below before offering the qualification.

- You must have suitable physical resources (for example equipment, IT, learning materials, teaching rooms) to support delivery and assessment of the qualifications.
- You must provide the specific resources required for individual units.
- Staff involved in the assessment process must have relevant skills or experience.
- You must have systems to provide continuing professional development for staff delivering the qualification.
- You must have suitable Health and Safety policies for students and staff using equipment.
- You must deliver the qualification in line with current equality legislation.

In this way, we can provide qualifications that meet the needs and expectations of students worldwide.

8.3 Monitoring internal systems

You will need to demonstrate that you continue to meet our centre approval criteria over time and across all Higher National programmes. This involves providing evidence to our external examiners for review.

Our examiners will check that:

- your systems and the way you use them remain suitable for supporting the programmes
- you apply student registration and appeals policies consistently, and
- you have effective internal examination and standardisation processes.

In some cases, you may present evidence of your operation within a recognised code of practice e.g. that of the Quality Assurance Agency for Higher Education. However, we may still want to confirm independently that these arrangements are operating to our standards.

If our examiners identify problems with your internal systems, we will take steps to help you correct them.

8.4 Independent review of assessments

The external examiner will review your internal assessments for all Pearson BTEC Higher National programmes benchmarked to Levels 4 and 5 of the Quality Assurance Agency (QAA) Framework for Higher Education Qualifications. They will either:

- confirm that your internal assessments meet national standards and allow certification, or
- provide actions to improve the quality of your assessments before allowing certification.

8.5 Annual programme monitoring report (APMR)

This annual review form gives you the opportunity to analyse and reflect on the most recent teaching year. It also provides us with information to help us improve the quality assurance of the Pearson BTEC Higher National programmes. An overview report is produced to outline the findings of the APMR each year.

8.6 Annual student survey

Pearson will conduct an annual survey of Pearson BTEC Higher National students. This provides us with a snapshot of every Higher National student's experience as part of the quality assurance process. Each centre with enough students taking part in the survey will get its own report about their results. You can access the report via HN Global at: http://hnglobal.highernationals.com.

8.7 Continuing quality assurance and standards verification

Each year we update our *BTEC Higher Nationals Centre Guide to Quality Assurance and Assessment*, available in the enhanced quality assurance section of our website at: https://qualifications.pearson.com/en/qualifications/btec-higher-nationals/about/quality-assurance-process.html. The handbook contains detailed guidance on the quality processes you should follow.

8.7.1 Our key principles of quality assurance

- A centre delivering Pearson BTEC Higher National programmes must be approved by us and must have our approval for the programmes or groups of programmes it is delivering.
- As part of gaining our approval, the centre agrees to always follow our terms and conditions for delivering programmes effectively and assessment quality assurance.

- We provide approved centres with a range of materials and opportunities for reviewing internal materials through our assessment-checking service. This service demonstrates the processes required for effective assessment and provides examples of effective standards. You must use these materials and services to make sure that all staff delivering Pearson BTEC Higher National qualifications keep up to date with the guidance on assessment.
- You must follow agreed processes for:
  - making sure that assessors and verifiers all work to the same standards and procedures
  - planning, monitoring and recording assessment processes, and
  - dealing with special circumstances, appeals and malpractice.
- We will work in partnership with you to help you achieve quality-assured assessment.
- We will help you follow best practice and use suitable technology to support quality assurance processes.
- We will try to make sure our quality-assurance processes do not create unnecessary administrative work for you.
- We will monitor and support you in achieving effective assessment and quality assurance.

We will do this by:

- making sure that you complete a suitable declaration at the time of approval
- carrying out approval visits to your centre
- making sure that you have a well-trained, effective team of assessors and verifiers
- sampling and verifying your assessments, assessed student work and other relevant documents, and
- reviewing your strategy for assessing and quality-assuring your BTEC programmes.

As an approved centre, you must advertise your certification only with our permission and in line with our reporting requirements.

If you do not have and maintain a strong approach to quality assurance, you will not be able to apply for certification for any of Pearson BTEC Higher National qualifications.

If you do not follow our recommendations for improving your quality assurance, we may withdraw approval for you to deliver our qualifications.

8.8 Use of Higher Technical Qualifications (HTQ) quality mark

When delivering the BTEC Higher Nationals in Marketing Management for England, centres must take care to ensure that they use the HTQ quality mark with due care and attention on promotional material.

The quality mark must be only used by centres in relation to an approved Higher Technical Qualification to demonstrate that the qualification has been:

- approved by the Institute for Apprenticeships and Technical Education (IfATE), and to advertise a specific course leading to a Higher Technical Qualification
- for careers advisory purposes, to explain and promote the Higher Technical Qualifications programme as a whole.

It should only be used to promote approved Higher Technical Qualifications and must not be used in a way that could reasonably be misinterpreted as a wider endorsement of any other qualifications or your centre overall.

For more information about who can use the quality mark, and how it should be used, please refer to *The Higher Technical Qualification Quality Mark Guidelines* at: https://www.gov.uk/guidance/higher-technical-education-reforms.

9.0 Recognition of Prior Learning and attainment

Recognition of Prior Learning (RPL) is a way of awarding credit if a student can demonstrate that they meet the assessment requirements for a unit through knowledge, understanding or skills they already have. As long as the assessment requirements are met, RPL can be used to accredit a unit, units or a whole qualification.

RPL provides a route for recognising the achievements of continuous learning from a range of activities using any valid assessment procedure. We encourage you to recognise students' previous achievements and experiences at work, at home, in leisure and in the classroom. Evidence of learning must be valid and reliable.

For full guidance on RPL, please see *Recognition of prior learning policy and process* in the support section of our website at: https://qualifications.pearson.com/en/support/support-topics/understanding-our-qualifications/policies-for-centres-learners-and-employees.html.

10.0 Equality, diversity and inclusion

Equality and fairness are central to our work. The design of these qualifications embeds equality, diversity and inclusion as set out in the qualification regulators' general conditions of recognition.

Promoting equality and diversity involves:

- treating everyone with equal dignity and worth, and
- raising ambitions and supporting achievement for people with different needs and backgrounds.

Creating an inclusive learning environment means anticipating students' varying needs and trying to make sure that all students have equal access to educational opportunities. This involves providing access for people who have differing individual needs and removing unnecessary barriers to learning. Qualification design must be inclusive so that students with and without disabilities have equal access to learning opportunities.

Our equality, diversity and inclusion policy requires that:

- all students have an equal opportunity to access our qualifications and assessments
- assessments should reflect the wide diversity of students, and
- our qualifications are designed and awarded in a way that is fair to every student.

We are committed to making sure that:

- students with a protected characteristic as defined by law (for example race, sexuality, religious belief) are not disadvantaged in comparison with students who do not share that characteristic
- all students achieve the recognition they deserve for taking a qualification, and
- this achievement can be compared fairly to the achievement of their peers.

Our qualifications should:

- be available to everyone capable of reaching the required standards
- be free from any barriers that restrict access and progress, and
- offer equal opportunities for all those who want to access them.

Please see our *Equity, diversity and inclusion in Pearson qualifications and related services policy* downloadable from the support section of our website: https://qualifications.pearson.com/en/support/support-topics/understanding-our-qualifications/policies-for-centres-learners-and-employees.html.

Please use your integrity when recruiting students to our Pearson BTEC Higher National programmes. You should:

- make sure they have the information and advice they need about the qualification to be sure that it meets their needs
- check each student's qualifications and experience to make sure they have the potential to achieve the qualification, and
- for students with disabilities and specific needs, consider the support available to them and any other support they may need during teaching and assessment.

Please see our policy documents on students with particular needs.

10.1 Access to qualifications for students with disabilities or specific needs

Students can be assessed in a recognised regional sign language.

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) at: https://www.jcq.org.uk/exams-office/access-arrangements-and-special-consideration and *A guide to the special consideration process – General and Vocational Qualifications* downloadable at: https://www.jcq.org.uk/exams-office/access-arrangements-and-special-consideration/regulations-and-guidance. Details on how to make adjustments for students with protected characteristics are provided in *Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*. See the support section of our website for both documents: https://qualifications.pearson.com/en/support/support-topics/understanding-our-qualifications/policies-for-centres-learners-and-employees.html.

11.0 Units

Unit 1: The Marketing and Sales Environment

Unit code	**R/650/7197**
Unit level	**4**
Credit value	**15**

Introduction

Marketing and sales activity is fundamental and universal to our everyday lives. Business organisations differ in many ways, depending on the industry in which they operate globally, but they do share one common feature: the transformation of inputs into outputs. This transformation process takes place against a background of external influences that influence marketing activity. The external environment in which business organisations operate is dynamic, complex, volatile and interactive, and marketing and sales functions play an important role in translating that environment at industry and consumer level.

The aim of this unit is to give students background knowledge and understanding of the marketing and sales functions, how they interrelate with other business functions of an organisation, and of the wider business environments in which marketing and sales operate. Students will examine how marketing creates demand and sales acts upon it.

The knowledge, understanding and skill sets that students gain in this unit will help students to develop business and commercial awareness. Students will be gaining insight into the characteristics and plans of the business and sector marketers work within, including their vision and values, and how marketing contributes to achieving wider business objectives. The unit is also designed to introduce students to the dynamic world of marketing and sales, and the wealth of exciting career opportunities available to support their decision-making in their career choices.

Learning Outcomes

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

LO1 Explain the functions of marketing and sales and how they relate to one another

LO2 Discuss how marketing and sales interrelate with other business units and link to organisational structure

LO3 Explore products and services in a range of diverse business settings

LO4 Recommend relevant tools and frameworks to make better marketing and sales decisions.

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Essential Content

LO1 Explain the functions of marketing and sales and how they relate to one another

The marketing and sales concept:

Defining the ***marketing concept***: customer understanding, channel development, propositions, pricing, experiences and communications to generate an advantage over competitors in a sustainable and profitable way

The concept of sustainable marketing for promotion of environmentally and socially responsible products, practices and brand values

The process of creating value for your target audience through the creation and distribution of content that is relevant to their needs and wants

Marketing acts as the 'customer champion', growth and demand generation engine for the organisation, future-focused, enables the company to understand the landscape in which they operate and develop strategies to survive and thrive in the environment

Defining the ***sales concept***: the ability to understand customer needs and wants and match products and services in a persuasive way

The ability to determine future demand from a customer perspective and feedback to the wider organisation to ensure future alignment with customer needs and wants.

Relationship between marketing and sales functions:

Marketing generates interest and sales converts interest into a transaction

Marketing and sales as business functions meeting business aims and objectives e.g. increasing sales and revenue, achieving customer satisfaction rates, creating and maintaining customers, brand and stakeholder value, identifying opportunities for growth, delivering change based on trends and information, achieving competitive advantage

The benefits of aligning sales and marketing strategically e.g. to reach more consumers, increase engagement and convert them into leads and customers.

The role of marketing:

The structure and operations of marketing departments:

- Customer understanding
- Marketing strategy
- Channel, distribution and customer experience

- Pricing and purchasing approaches
- Communications, advertising and CRM
- Marketing effectiveness and measurement.

Types of marketing roles, and responsibilities e.g. marketing communications officer, digital marketer, content and copywriter, paid social specialist

Types of marketing activities e.g. collecting and analysing research information, ethical brand development, developing a compelling proposition, developing marketing strategies to meet customer needs and creating future growth opportunities, managing marketing channels, engaging customers and creating a seamless customer experience

Key functions of marketing e.g. bridging the gap between the customer and the organisation, gaining market insight and research, understanding and championing customers, helping the organisation to become more customer focused, being the growth engine for the organisation by developing future focused marketing strategies and plans that drive business value

The differences between Business to Business (B2B), Business to Customer (B2C) marketing and Consumer to Consumer (C2C) marketing

The role of marketing in achieving sustainability now and in the future.

The role of sales:

The importance of the role of sales e.g. customer understanding, developing sales opportunities, sales lead conversions, business growth, customer retention, customer service and after care.

The structure and operations of sales departments:

- Account Management
- Sales Development
- Sales Representatives
- Customer Services

Types of sales of roles and responsibilities e.g. advisor, sales representative, business development executive and field sales executive

Types of sales activities including planning sales activities, leading the end-to-end sales interaction with the customer and managing sales, budget and forecasting to meet business planning requirements

The sector-specific legal, regulatory and compliance frameworks, including current Data Protection regulations e.g. Advertising Codes of Conduct, Greenwashing guidance, Misleading Marketing Regulations (2008).

LO2 Discuss how marketing and sales interrelate with other business units and link to organisational structure

Different types of business organisations:

Differences between for profit and not for profit and non-government organisations (NGOs)

Differences between large, medium-sized and small organisations (SMEs) business characteristics; including mission, values, purposes, objectives and supply of products and services, and marketing strategies.

Organisational structure:

Different structures depending on the size and scope of the organisation, including bureaucratic and post-bureaucratic, parent, strategic business units (SBUs), matrix and functional levels

The virtual organisation and flexible, fluid structures that are geographically dispersed

Organisation structures and complexities of transnational, international and global organisations, that influence the marketing landscape e.g. franchising, mergers and acquisitions, and joint ventures.

The interrelationships of business units:

The different roles of business units and the interrelationships between these functional areas and marketing and sales.

Objectives of each business unit:

Operations: to create the most efficient processes and services to meet the customer need

Human resources: to work with each business unit to define the talent and capability requirements as well as manage staffing related activities

Finance: to ensure the organisation is able to meet all its financial obligations, whilst making a profit for its shareholders/stakeholders

Marketing: to be the voice of the customer in the organisation, and to create strategies and approaches to meet their needs

Sales: to manage and form relationships with customers in order to match an organisation's products and services with a customer need.

Difference between business, marketing and sales strategy:

Strategic alignment, marketing and sales strategies to meet overall business strategy

The principles of stakeholder management and customer relationship management (CRM) to facilitate effective cross-functional relationships internally, e.g. stakeholder mapping, project management, working groups, internal communications, technology to enable collaboration.

LO3 Explore products and services in a range of diverse business settings

The product/service concept:

Definition and meaning of both product and service concept, including tangible and intangible attributes, standards of quality, perishability, production vs interaction

The level of customer integration in product/service development and marketing

The product–service system to support sustainable performance

Product and service design for sustainability, e.g. sourcing sustainable materials and/or packaging, creating a product that contributes to sustainable living.

Product development or service innovation:

The design process and the different stages, including market testing and feasibility study, preliminary design and pilot testing. The value of a reiterative process

Product launch and linking to marketing communications and distribution

Guidance on designing and pitching new/adapted products/services

New or improved service launch, marketing communications and generating consumer interest.

Product marketing vs service marketing:

Differences between servicing marketing and product marketing e.g. tangible vs intangible, ownership, trust, customisation

Different types of marketing techniques for product and services in B2B and B2C contexts

Ethical marketing of products and services to promote brand values and morals

The use of immersive 3D technologies creating new opportunities to connect with consumer through interactive and virtual reality (VR) storytelling.

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LO4 **Recommend relevant tools and frameworks to make better marketing and sales decisions**

Frameworks for analysis:

External analysis: STEEPLE analysis including social, technological, economic, environmental, political, legal and ethical factors that influence and impact marketing and sales (PESTLE), Porter's 5 Forces for competitive analysis and market demand

Internal analysis: Boston Consultancy Group (BCG) to classify products within the product portfolio, marketing mapping to identify where there are 'gaps' in the market

Combined external/internal analysis: introduction to Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis to assist in the decision-making process and feed into marketing and sales planning

Different applications of SWOT analysis e.g. for market positioning, commercial viability, launching a new product, methods of sales distribution.

Both internal and external exploration of the business environment:

Internal analysis of production capacity, branding, product portfolio, staff skills, access materials and suppliers; opportunities and threats and external analysis of market demand, changing technology, competitor strength

The role of analysis in decision-making, development of strategies and creating Key Performance Indicators (KPIs) to measure performance.

Learning Outcomes and Assessment Criteria

<table>
<tr><th>Pass</th><th>Merit</th><th>Distinction</th></tr>
<tr><td colspan="2">LO1 Explain the functions of marketing and sales and how they relate to one another</td><td rowspan="5">LO1 and LO2

D1 Critically analyse the complexities and inter relationships of marketing and sales.</td></tr>
<tr><td>P1 Explain the concept of marketing and sales in a B2B, B2C and C2C context.

P2 Explain the different roles and functions of marketing and sales in a given organisation, and how they work together.</td><td>M1 Analyse how the structure and functions of marketing and sales link to business objectives in a given organisation.</td></tr>
<tr><td colspan="2">LO2 Discuss how marketing and sales interrelate with other business units and link to organisational structure</td></tr>
<tr><td>P3 Examine the relationship between marketing and sales functions and other business units within an organisation.</td><td>M2 Analyse the impact that interrelationships have upon the structure of an organisation.</td></tr>
</table>

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Pass	Merit	Distinction
LO3 Explore products and services in a range of diverse business settings		
P4 Explore different approaches taken to the marketing and selling of a range of products and services in different industry sectors.	**M3** Compare different approaches taken to marketing and selling products and services in a B2B, B2C and C2C context.	**D2** Evaluate approaches of marketing and selling products and services to successfully meet marketing objectives for growth.
LO4 Recommend relevant tools and frameworks to make better marketing decisions for given business situations		
P5 Recommend a range of tools and frameworks to analyse the external and internal business environment for making better marketing decisions.	**M4** Discuss the value of tools and frameworks to review marketing objectives and support better business decisions, providing examples.	**D3** Justify the use of recommended tools and frameworks for achieving better marketing decisions in given business situations.

Recommended Resources

Textbooks

Blythe, J. and Martin, J. (2023) *Marketing Essentials*. 8th Ed. London: Pearson.

Jobber, D. and Chadwick, F. (2023) *Principles and Practice of Marketing*. 10th Ed. Maidenhead: McGraw-Hill.

Kotler, P. and Armstrong, G. (2023) *Principles of Marketing*. 19th Ed. London: Pearson.

Websites

www.cim.co.uk	Chartered Institute of Marketing (General reference)
www.marketingdonut.co.uk	Marketing Donut (General reference)
www.marketingteacher.com	Marketing Teacher All sections (General reference)
www.marketingweek.com	Marketing Week New and industry articles (General reference)

Unit 2: The Principles of Marketing and Sales

Unit code	**T/650/7198**
Unit level	**4**
Credit value	**15**

Introduction

Large, medium and small businesses that operate globally, internationally or locally have at least one thing in common – they all use marketing to influence us to engage with their products and/or services. Whether this means becoming a loyal customer buying a product, service or donating to a charity, organisations use a range of marketing techniques and tools to inform and influence us.

Students will be introduced to the key principles of marketing and sales, enabling them to develop a marketing and sales funnel to achieve results. They will study the underpinning theories and frameworks of marketing while relating them to real-world examples, including products/services that they encounter in their daily lives.

The knowledge, understanding and skill sets that students will gain on successfully completing this unit will enhance their career opportunities, whether this is setting up their own business or employment in an organisation.

Learning Outcomes

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

LO1 Apply market segmentation within a B2B and B2C context to select appropriate target markets

LO2 Explain the buying behaviour, and decision-making of market segments for products and/or services of a given business organisation

LO3 Compare ways in which organisations use elements of the marketing mix to achieve overall business objectives

LO4 Create a marketing and sales funnel for a B2C context for an organisation.

Essential Content

LO1 **Apply market segmentation within a B2B and B2C context to select appropriate target markets**

Defining market segmentation, e.g. bases of market segmentation is to divide your market in to distinct groups of buyers who have different needs, characteristics or behaviours to develop separate marketing strategies or mixes

The importance of market segmentation, e.g. to ensure organisations are able to meet the different needs of their customers by offering appropriate products and services

The different market segmentation approaches, including:

- demographic (age, generation, gender, ethnic background, marital status, family life cycle, family size, education, religion)
- geographic (location, proximity to point of sale, country/continent, region/area, city, urban/rural)
- psychographic (social class, personality traits, attitudes, interests, hobbies, lifestyle, values, opinions)
- behavioural (consumer knowledge, user status, user rate, loyalty status)

Effective segmentation criteria for meaningful and measurable segments (measurable, substantial, accessible differentiable, actionable)

Subdividing consumer and business markets

The different types of Business to Business (B2B) markets e.g. producers, resellers

Determine targeting approaches, including market size and scope, consumer preferences, competitive landscape and go-to market strategies

Targeting using quantitative approaches to qualifying segments, link to organisation's vision and goals, and techniques to identify the most viable segments

Positioning, brand attributes, the use of perceptual mapping, influence buyer's perceptions.

LO2 **Explain the buying behaviour, and decision-making of market segments for products and/or services of a given business organisation**

Customer behaviours and attitudes:

Understanding the customer behaviours and attitudes of different market segments to build brand loyalty and trust

The four clusters of emotions that drive or destroy value (Shaw)

The use of perceptual mapping to understand how customers view products and services

Different between how decisions are made in Business to Customer (B2C) vs Business to Business (B2B).

Introduction to consumer decision-making:

Individual influences on buyer behaviour e.g. motivations, values, the digital environment, consumer learning; perceptions, e.g. dynamics, imagery and risk; attitudes, lifestyles

External influences on buying behaviour e.g. ethical considerations, climate change, sustainability, global pandemic

Group influences on buyer behaviour e.g. reference groups, culture, opinion leaders

Business/organisational influences on buyer behaviour e.g. group think, consensus, business requirements planning, procurement, contracting.

Models of consumer decision-making:

The five-stage buying process

The value of mapping a path to purchase e.g. the consumer-decision journey from pre-purchase, purchase, receive and post-purchase

Four views of consumer decision-making: economic, passive, emotional and cognitive

Business to Customer (B2C) and Business to Business (B2B) decision-making processes

The ***problem recognition model***, in which consumers recognise a need or a want and then begin the decision-making process

The ***information search model***, in which consumers actively seek out information about potential products or brands to satisfy their need or want

The ***evaluation of alternatives model***, in which consumers compare different options and evaluate their relative merits

The ***purchase decision model***, in which consumers make a final choice and take action to purchase a product or service

The ***post-purchase evaluation model***, in which consumers evaluate their satisfaction with their purchase and may engage in post-purchase behaviours e.g. as repurchasing or recommending the product to others

The Routinised Response Behaviour Model, in which consumers make purchase decision based on their previous purchase experience and habit.

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LO3 **Compare ways in which organisations use elements of the marketing mix to achieve overall business objectives**

Marketing mix tactics for building and maintaining stakeholder relationships, penetrating markets, expanding reach to new market segments and developing new products

Adapting and integrating the marketing mix to meet organisational objectives, sustainable objectives, and changes in a competitive environment

Measuring the effectiveness of the marketing mix using metrics e.g. market share, sales, number of new products, repeat purchases, discount levels and margins, customer satisfaction rates.

The 7Ps marketing mix:

Creating a unique selling proposition for products and services

Product portfolios analysis (Boston Consulting Group Matrix and GE McKinsey Matrix) to identify new product development and planning for the different stages of the product lifecycle

Reviewing ***pricing*** models in view of established price points and sensitivity to competitors' pricing and consumers

Different pricing strategies and tactics

Place strategies and channel distribution for expanding access and reach to specific market segments including franchising, joint ventures and use of agents

Promotion to stay ahead of the competition, including integrated communication mix, cross-communication solutions and digital promotional tools and strategies

The different roles of ***'people'*** in marketing, including customer interfacing and support personnel to deliver both customer value and added value

Physical evidence and the tangible aspects of service delivery – visual, aural and olfactory elements

Systems and ***processes*** involved in delivering a consistent service. The different types of processes used to expedite the marketing function.

LO4 **Create a marketing and sales funnel for a B2C context for an organisation**

Definition of the marketing and sales funnel process, and the different stages of the funnel process; awareness, consideration, conversion, engagement

Demand generation vs demand conversion

The benefits of using the funnel process, building a customer journey analysis to address how customers engage at every stage

Building an effective marketing funnel using Awareness, Interest, Desire, Action (AIDA) framework; lead generation from marketing campaigns, events, advertising, social media; lead nurture using positioning, targeting, free trials, and lead intent from the use of product demos, shopping carts

Best practices for building an effective sales funnel e.g. create a landing page, create content to capture your audience attention, generate an email campaign, follow up on leads

The differences between B2C and B2B funnels

Techniques for monitoring success and optimising the funnel.

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Learning Outcomes and Assessment Criteria

<table>
<tr><th>Pass</th><th>Merit</th><th>Distinction</th></tr>
<tr><td colspan="2">LO1 Apply market segmentation within a B2B and B2C context to select appropriate target markets</td><td rowspan="4">LO1 and LO2

D1 Analyse buying behaviours, and habits of target markets using criteria that measure the viability of the target market to justify selection.</td></tr>
<tr><td>P1 Apply market segmentation for an organisation’s products/and or services to target markets for both consumer and business.</td><td>M1 Apply effective market segmentation criteria to subdivide consumer and business target markets, where products/or services will be in most demand.</td></tr>
<tr><td colspan="2">LO2 Explain the buying behaviour, and decision-making of target markets for products and/or services of a given business organisation</td></tr>
<tr><td>P2 Explain the buying behaviours, and the stages of the consumer decision-making journey for different markets that are targeted for a given organisation products and/or services.</td><td>M2 Discuss why it is important for marketers to map a path to purchase and understand consumer behaviour and decision-making.</td></tr>
</table>

<table>
<tr><th>Pass</th><th>Merit</th><th>Distinction</th></tr>
<tr><td colspan="2">LO3 Compare ways in which organisations use elements of the marketing mix to achieve overall business objectives</td><td rowspan="4">LO3 and LO4

D2 Evaluate strategies and tactical approaches to achieve overall marketing objectives.</td></tr>
<tr><td>P3 Compare the ways in which different organisations apply the marketing mix to the marketing planning process to achieve business objectives.</td><td>M3 Review strategies and tactical approaches applied by organisations to demonstrate how business objectives can be achieved successfully through adjustments in the marketing mix.</td></tr>
<tr><td colspan="2">LO4 Create a marketing and sales funnel for a B2C context for an organisation</td></tr>
<tr><td>P4 Produce a marketing and sales funnel for an organisation that aligns to the customer journey and engagement.</td><td>M4 Produce a marketing and sales funnel that provides specific marketing tactics at each level of the funnel to generate and engage customers.</td></tr>
</table>

Recommended Resources

Textbooks

Blythe, J. and Martin, J. (2023) *Marketing Essentials*. 8th Ed. London: Pearson.

Brandon, D. (2022) *Sales Funnel Marketing: Get New Customers, Grow Your Company Online with Sales Funnels and Stand Out from the Crowd*. Amazon Digital Services.

Banks, B. (2022) *The Marketing Funnel: The formula for building a high-converting sales funnel*. Amazon Digital Services.

Fahy, J. and Jobber, D. (2022) *Foundations of Marketing*. 7th Ed. London: McGraw Hill.

Jobber, D. and Chadwick, F. (2023*) Principles and Practice of Marketing*. 10th Ed. Maidenhead: McGraw-Hill.

Kotler, P. and Armstrong, G. (2023) *Principles of Marketing*.19th Ed. London: Pearson.

Websites

The Benefits Of A Marketing Funnel And How To Create An Effective One (forbes.com)	Forbes Article (General reference)
What Are the 4 Ps of Marketing? The Marketing Mix Explained [Example] (hubspot.com)	Hubspot Blog (General reference)
How to use the 7Ps Marketing Mix strategy model? (smartinsights.com)	Smart Insights Blog (General reference)

Unit 3: Market Research and Techniques (Pearson-set)

Unit code	**Y/650/7199**
Unit level	**4**
Credit value	**15**

Introduction

Understanding customers and their context is critical for any marketer. In a constantly changing environment, marketers need to be able to design products and services that meet the changing needs and wants of their audience, which is why conducting market research is so important.

The ability to understand and analyse both qualitative and quantitative information is an essential skill in coming to the right conclusions and making the right decisions for marketers. Market research is concerned with the discipline of collection and evaluation of specific data in order to help businesses understand their customer needs better and then deliver to them. To succeed, business organisations must collect and analyse data that concerns customers, markets, competitors and business processes, to support marketing decision-making.

In this unit, students will be introduced to the knowledge, skills and techniques needed to conduct market research, including the collection, storage and interrogation of qualitative and quantitative data for business decision-making. They will explore methods of marketing research, both offline and online, and the techniques needed to interpret the insights to assist marketing decision-making. Students will learn the principles of effective market research and how this can influence marketing activity. They will also explore the numerical analysis techniques and digital platforms required to generate and present data and information. In this way, students will gain the knowledge and skills required to present findings, conclusions and recommendations to a business audience.

***Please refer to the accompanying *Pearson-set Assignment Guide and Theme and Topic Release* document on HN Global for further support and guidance on the delivery of the Pearson-set unit**

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Learning Outcomes

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

LO1 Explain the importance of market research required for marketing activities

LO2 Collect market research data using a range of methods and techniques

LO3 Apply techniques to interpret and analyse market research data

LO4 Present information in appropriate formats to support strategic decision-making.

Essential Content

LO1 Explain the importance of market research required for marketing activities

The importance of market research:

The purpose and benefits of market research e.g. identifying new customers, identifying new opportunities, understanding the requirements of the target audience, helping to understand what key messages to convey and how to convey them

Improving products and services to meet changing consumer needs and demands

Meeting strategic objectives by providing insights and information into the business

Collecting data to inform marketing analytics e.g. clickthrough rates, bounce rates, conversion rates or social media engagement. Identifying patterns and making data driven decisions

The use of marketing analytics to improve marketing activities e.g. product intelligence, customer trends, customer support, messaging and media.

Defining types of research methods:

Qualitative vs qualitative research, primary vs secondary research

Offline vs online.

Different types of market research:

Brand research

Campaign effectiveness

Competitor research

Consumer research

Customer segmentation research

Product development

Usability testing.

LO2 **Collect market research data using a range of methods and techniques**

The market research process:

The stages of the market research process; identifying the problem, setting objectives, hypothesis development, process of collecting data both primary and secondary, analysing results, taking action, reviewing and iteration.

Sources of market research data:

The difference between data and information

Internal sources, including data records, loyalty schemes, electronic point of sale (EPOS), website monitoring, e-transactions, accounting records, production information, sales figures, sales personnel

External sources, including internet, government statistics, printed materials, university research, company reports, trade journals, specialist agencies

Different primary data sources e.g. observation, experimentation, e-marketing research, focus groups, panels, field trials, piloting, surveys and methods, face-to-face, postal, email, online, telephone

Appropriateness of each method e.g. fitness for purpose, cost, accuracy, time, validity, response rate

Benefits of combining multiple market research techniques e.g. more accurate and reliable results, see information from multiple perspectives, develop more in-depth customer understanding and insights.

Validity and reliability of data:

The advantages and disadvantages of qualitative and quantitative approaches to research

Criteria for selection of data e.g. checking validity, source accuracy, bias, subjectivity, timeliness/currency

Limitations of market research; size and scope, blind spots and bias, centred on the past

Corporate social responsibility and compliance e.g. cyber security and information security management systems requirements (ISO/IEC 27001:2013)

Compliance and associated regulations, including data protection and privacy legislation e.g. General Data Protection Regulation 2018 (GDPR).

LO3 **Apply techniques to interpret and analyse market research data**

Apply, interpret and evaluate data presented in quantitative format:

Quantitative techniques: cross tabulation, trend analysis, gap analysis

Representative values: arithmetic mean, median, mode

Range, inter-quartile range

Measures of dispersion: standard deviation

Calculation: use of quartiles, percentiles and cumulative frequency

Interpretation of correlation coefficient, times–series and trends

Interpretation of pictograms, pie charts, bar charts, frequency curves, histograms, line graphs, scattergrams and tables.

Apply, interpret and evaluate data presented in qualitative format:

Qualitative techniques: interview transcripts, open ended questionnaire questions, observation notes

Techniques manually and automated to organise unstructured data e.g. use of Excel spreadsheets, computer-assisted qualitative data analysis software (CAQDAS)

Use of content analysis, thematic analysis, narrative analysis and discourse analysis.

LO4 Present information in appropriate formats to support strategic decision-making

Different formats to meet strategic needs:

Different written report formats e.g. formal or informal, and their appropriateness for audience and content

Different types of presentations including choice and use of appropriate software to include textual, graphical and pictorial elements

Use of handouts and summary sheets, visual aids.

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Use of tables, graphs, charts, diagrams, infographics:

Creation of pictograms, pie charts, bar charts, frequency curves, histograms, line graphs, scattergrams, bubble charts

Making use of scattergrams or scatter (XY) graphs and linear trend lines: extrapolation for forecasting (reliability)

Scatter maps for geographic data

The use of tables e.g. pivot tables to simplify and rationalise the presentation of data to aid understanding of the information within that data

The use of appropriate formats e.g. one-way tables, two-way tables.

The strategic decision-making process:

Collating information and data to analyse and identify problems, issues, opportunities and threats

Viewing problems, issues, opportunities and threats from different perspectives

Understanding the long-term and short-term implications of potential avenues and directions

Alignment with the mission and vision of an organisation and seeking to support growth

Types of strategic marketing decisions e.g. entering new markets, launching a new product, product diversification.

Learning Outcomes and Assessment Criteria

<table>
<tr><th>Pass</th><th>Merit</th><th>Distinction</th></tr>
<tr><td colspan="2">LO1 Explain the importance of market research for optimising market performance</td><td rowspan="2">D1 Recommend market research methods to optimise objectives for different types of market research.</td></tr>
<tr><td>P1 Explain the value and importance of different types of market research for marketers and market strategy.

P2 Discuss different market research methods that can be conducted to gain deeper insights.</td><td>M1 Compare different methods of quantitative and qualitative market research used to optimise market performance.</td></tr>
<tr><td colspan="2">LO2 Collect market research data using a range of methods and techniques</td><td rowspan="2">D2 Justify the validity and reliability of the outcomes of the market research.</td></tr>
<tr><td>P3 Conduct primary and secondary research to support marketing decision-making.

P4 Apply a range of different methods and techniques to collect market research data.</td><td>M2 Analyse methods and techniques used to collect market research to support marketing decision-making.</td></tr>
</table>

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Pass	Merit	Distinction
LO3 Apply techniques to interpret and analyse market research data		
P5 Apply quantitative and qualitative techniques to interpret given data sets. **P6** Illustrate in diagrammatic forms different ways in which data can presented.	**M3** Analyse data sets given in quantitative and qualitative diagrammatic forms.	**D3** Critically analyse data sets given in quantitative and qualitative diagrammatic forms to formulate valid conclusions.
LO4 Present information in appropriate formats to support strategic decision-making		
P7 Compose a written report to present findings, conclusions and recommendations from research collection. **P8** Formulate a presentation to convey findings, conclusions and recommendations from research.	**M4** Discuss appropriate use of tables and selected graphical visuals in the report and presentation to support the communication of findings, conclusions and recommendations.	**D4** Evaluate how the formats selected, and the use of textual, tabular and graphical visuals met the needs of the business audience.

Recommended Resources

Textbooks

Beall, A. (2022) *Strategic Market Research: A Guide to Conducting Research that Drives Businesses*. 4th Ed. Beall Research.

Hague, P. (2021) *Market Research in Practice: An Introduction to Gaining Greater Market Insight*. 4th Ed. London: Kogan Page Ltd.

McGivern, Y. (2021) *The Practice of Market Research: From Data to Insight*. 5th Ed. London: Pearson.

Websites

https://blog.hubspot.com/marketing/market-research-buyers-journey-guide	Hubspot (General reference) Templates
https://www.marketingdonut.co.uk/market-research	Marketing Donut (General reference)

Unit 4: Managing Customers

Unit code	**J/650/7200**
Unit level	**4**
Credit value	**15**

Introduction

Relationship marketing focuses on the end-to-end customer relationship that an organisation has with their audiences, in order to maximise engagement, loyalty and build a mutually beneficial relationship, in the short and long term. It is beginning to play a more vital role in business, as organisations foster a deeper and long-term relationship with current and prospective customers.

In this unit students will learn the principles of customer relationship management (CRM), and how to build a robust customer relationship management approach, including the type of CRM systems we need in place to achieve it. They will look at how to help organisations build customer relationships and streamline processes so they can increase sales, improve customer service and increase profitability at different touch points.

Students will learn how to use digital technologies to deliver marketing outcomes, including CRM tools and software to help streamline the customer engagement process, close more sales deals, establish strong customer relationships, build customer loyalty, and ultimately increase sales and profits.

Learning Outcomes

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

LO1 Explain the principles and benefits of customer relationship management

LO2 Investigate the impacts of digital technology on customer relationship management

LO3 Apply techniques to enhance the customer experience and develop customer relationships for marketing purposes

LO4 Compare a range of metrics available to monitor customer experiences and drive objectives.

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Essential Content

LO1 **Explain the principles and benefits of customer relationship management**

Customer relationship management (CRM):

Defining CRM and benefits, for example:

- Generating mutually beneficial relationships between an organisation and their customers, in order to maximise the value/impact for both parties
- Using data, systems and processes to identify a customer's changing needs and be able to deliver these in a dynamic and proactive way
- Being able to resolve any issues, problems and bottlenecks in a timely and efficient manner, thereby creating customer delight
- Determining the channels and touchpoints that are most appropriate for different customer groups and creating a seamless experience for them
- Purpose–establishing, maintaining and enhancing the relationship between the organisation and external customers

The stages of the customer lifecycle; reach, acquisition, conversion, retention, and loyalty, and using CRM to ensure customers repeat the cycle

Characteristics of effective CRM–responsiveness: accessibility; reliability; courtesy; consideration; communication; flexibility; competence; recognition of the customer

Key stakeholder management to support the process of CRM and implementation.

Relationship marketing:

Definition as the building of long-term relationships of mutual advantage with customers; importance of the functions of customer service and quality in relationship marketing; difference between transactional marketing and relationship marketing

Providing sales teams with a platform for tracking, analysing, and entering lead data.

Benefits:

Greater efficiency leading to improved performance, increased customer satisfaction, better management, consistent quality standards, improved compliance with legislation and regulations, clear expectations of employees, greater transparency across organisation, enhanced customer service and experience

Use in review and planning of marketing activities: analysis of customer behaviour in response to marketing activities or external changes; analysis of customers into different target groups; sharing intelligence between different departments within the organisation

Ability to generate enhanced commercial performance, through cross-sell and up-sell activities as well as increase the tenure of a customer with an organisation.

LO2 **Investigate the impacts of digital technology on customer relationship management**

Impacts that digital technology has had upon enhancing the ability of a company to conduct CRM activities e.g. better data to understand customer interactions and behaviours, marketing automation to help build proactive relationships, determine changes to a customer's circumstances creating valuable interaction opportunities, demonstrate an organisation understands a customer's needs and wants and offers it to them in a seamless way

Definition of Customer Relationship Management (CRM) systems

Different types of CRM systems e.g. operational, analytical, and how each of these contribute to the management of customer relationships

CRM technologies using cloud-based systems e.g. Sales Force, Oracle, and CRM on mobile devices (including notifications), social media tools, email marketing tools

Techniques and tools used to audit CRM data, identify issues and fix those issues within the database.

Online customer experiences:

Business interactions with current and potential customers via a choice of integrated digital marketing channels

Digital content and the speed and consistency of exchanges and transactions impacts on individual businesses

The use of digital technologies to enhance the customer experience e.g. use of direct marketing and selling, algorithms and AI, complaint handling and post purchase management

Social relationship with customers:

The use of different social media platforms to raise awareness of products and services and communicate with customers

Service more relevant and personalised content, products, services and offers to different customer groups

Influencing customer's expectations and behaviours through the use of social media

Tracking conversations to determine target audience use of platforms, and customer sentiment for the brand.

LO3 Apply techniques to enhance the customer experience and develop customer relationships for marketing purposes

Understanding the customer journey:

The concept of the customer journey, including:

- mapping the journey
- service satisfaction
- critical incidents
- moments of truth
- customer touch points
- service blueprints
- ladder of loyalty.

The ways in which digital technologies can enhance the customer journey e.g. chatbots, online forums, comparison websites, social media, online buying.

Techniques to enhance customer experience:

Different methods, including mapping the customer journey (rationale and emotional), identifying opportunities and touchpoints for improvements, closing gaps inexperience vs expectations, extending the relationship cycle

Customer relationship management, including:

- concept
- systems
- managing all face-to-face/online interactions
- enhancing customer value
- dynamic approach–continuous improvement

Building loyalty with customers and identifying the relationship between enhanced customer experience and brand loyalty

Practices and strategies throughout the different stages of the customer journey e.g. raising brand awareness and familiarity, interaction online/offline, building trust and sales, nurturing interest through convert communications, and customer communications post purchase, growing loyalty.

LO4 Compare a range of metrics available to monitor customer experiences and drive objectives

Customer relationship management objectives:

To increase customer satisfaction, improve advocacy, enhance customer loyalty, improve customer conversions and improve sales per customer.

Monitoring systems and techniques:

Customer perceived quality and gap analysis, use of quality circles, benchmarking

Value chain alignment of customer value chain and organisation value chain; improvement methods e.g. using fishbone (Ishikawa) analysis

Tracking and evaluating customer satisfaction: customer retention management through database marketing in conventional retailing; lost customer analysis; the importance of a transparent complaints-handling

System and related opportunities to improve customer service and experience; suggestion schemes, user panels, field visits, mystery shoppers.

Customer metrics:

Tracking long-term data and monitoring metrics in real-time to enable a holistic, customer-centric view of the overall sales process

Measuring and calculating using a range of metrics:

- Surveys conducted to rate the Customer Satisfaction Score (CSAT), use of Net Promotor Scores (NPS) to calculate willingness of customers to promote products and services
- Customer Effort Scores (CES)
- Customer churn rates and retention rates
- Customer Lifetime Value (CLV).

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Learning Outcomes and Assessment Criteria

<table>
<tr><th>Pass</th><th>Merit</th><th>Distinction</th></tr>
<tr><td colspan="2">LO1 Explain the principles and benefits of customer relationship management</td><td rowspan="4">LO1 and LO2

D1 Critically evaluate CRM and systems used in businesses for the acquisition and retention of customers.</td></tr>
<tr><td>P1 Explore customer relationship management in the context of marketing and the customer lifecycle.

P2 Explain the benefits of customer relationship management.</td><td>M1 Assess the benefits of the customer relationship management at each stage of the customer lifecycle.</td></tr>
<tr><td colspan="2">LO2 Investigate the impacts of digital technology on customer relationship management</td></tr>
<tr><td>P3 Examine how digital technology is employed in managing the customer experience providing specific examples.</td><td>M2 Evaluate how digital technologies employed in managing the customer experience are changing CRM to acquire and retain customers effectively.</td></tr>
</table>

<table>
<tr><th>Pass</th><th>Merit</th><th>Distinction</th></tr>
<tr><td colspan="2">LO3 Apply techniques to enhance the customer experience and develop customer relationships for marketing purposes</td><td rowspan="5">LO3 and LO4

D2 Recommend ways for improving and creating a seamless customer experience to drive marketing objectives.</td></tr>
<tr><td>P4 Design a customer experience strategy, selecting appropriate techniques to enhance customer experience, to meet marketing opportunities.</td><td>M3 Design a detailed customer experience strategy, selecting appropriate techniques to enhance customer experience and maximise marketing opportunities.</td></tr>
<tr><td colspan="2">LO4 Compare a range of metrics available to monitor customer experiences and drive objectives</td></tr>
<tr><td>P5 Review methods for monitoring and improving the customer experience for different products and services.

P6 Compare and contrast the benefits and limitations of customer experience metrics.</td><td>M4 Assess the validity, reliability and suitability of methods for improving customer experience.</td></tr>
</table>

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Recommended Resources

Textbooks

Buttle, F. (2019) *Customer Relationship Management: Concepts and Technologies*. 3th Ed. Oxford: Routledge.

Goodman, J. (2019) *Strategic Customer Service: Managing the Customer Experience to Increase Positive Word of Mouth, Build Loyalty, and Maximize Profits*. 2nd Ed. Maidenhead: Amacom.

Hollensen, S. (2019) *Marketing Management: A relationship approach*. 4th Ed. London: Pearson.

Websites

www.mckinsey.com	The expanding role of design in creating an end-to-end customer experience (Article)
www.dynamics.microsoft.com	Microsoft What is CRM (Article)
https://www.youtube.com/watch?v=oZilXZyEztI	Customer lifecycle marketing explainer *Youtube* video

Unit 5: Business Skills and Communications

Unit code	**K/650/7201**
Unit level	**4**
Credit value	**15**

Introduction

Effective communication and stakeholder relationships are essential for success in marketing and for creating sustainable relationships. Marketers are expected to establish good relationships with internal and external stakeholders, as they are often involved in liaising and networking with a range of stakeholders including customers, colleagues, suppliers (including agencies) and partner organisations.

This unit aims to give students the opportunity to develop their business acumen, covering a range of different vital business skills applied within industry context. These include stakeholder relationship, working collaboratively and effective reporting on marketing activities.

Students will look at concepts of communication in organisations and how to select communication techniques that are fit for purpose. They will investigate the contribution of interpersonal skills for successful relationship management and consider ways to build positive relationships with partners, stakeholders and suppliers.

Students will develop knowledge of approaches to collaboration, influencing and networking in a teamworking context, and develop techniques for communicating effectively both verbally and non-verbally. In future, these transferable skills can be applied in various contexts to add value to any business.

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Learning Outcomes

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

LO1 Apply a range of interpersonal skills and different approaches to stakeholder and customer relationship management

LO2 Work collaboratively within a team to share good practice for continuous improvement

LO3 Interpret customer information to communicate effectively using a range of written, verbal and non-verbal communication

LO4 Apply technical skills using an excel spreadsheet to report on marketing activities.

Essential Content

LO1 Apply a range of interpersonal skills and different approaches to stakeholder and customer relationship management

Customer relationship management (CRM):

Skills required to effectively manage customer relationships e.g. analytical, interpersonal, empathy, process, commercial acumen, communication

Ability to communicate with and understand customer needs and wants

Being able to develop appropriate strategies and approaches to meet customer needs and wants

The use of CRM to create more personalised experiences for customers

Understanding what good customer service looks like and how to develop solutions to exceed customer expectations

Different commercially viable approaches to CRM.

Stakeholder relationship management:

Creating good working relationships by motivating teams, increasing productivity, solving problems, networking effectively, asking the right questions, being clear and concise, identifying common ground, establishing trust and rapport, and effectively managing conflict

Identifying stakeholder and partnership relationships for strategic fit and alignment with sustainability goals, and collaborating and co-creating to deliver change.

Application of interpersonal skills in relationship management:

Developing interpersonal relationships with subordinates, colleagues, partners, customers, suppliers

Importance of developing emotional intelligence to build high-quality connections with stakeholders by listening, understanding, challenging and managing their expectations, strengthening relationships with feedback, expressing gratitude and appreciation.

Approaches to relationship management:

Engagement with stakeholders e.g. being authentic, dependable and reliable, establishing shared goals and values, developing mutual respect

Valuing equality and diversity

Encouraging involvement e.g. excellent communication, openness, honesty, transparency

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Influencing stakeholders e.g. the ability of leader to affect, to shape, or to transform the opinions (convincing) and the behaviours and actions (persuading)

Critical leadership competency; outcomes of influencing, commitment, compliance, resistance

Communicating organisational vision and goals to different stakeholders.

LO2 Work collaboratively within a team to share good practice for continuous improvement

Effective teamworking:

The importance of work groups and effective teamworking in contemporary organisations

Types of teams e.g. functional and cross-functional, problem-solving, project and self-directed teams

Team development models: the stages of team development and the implications for task achievement and team-member relationships.

Tuckman's four stages of team development

Digital tools for communication e.g. Slack, Skype, Microsoft Teams, and for project management e.g. Trello and Smartsheet

Cloud-based technologies for file sharing, collaboration and storing information.

Collaborative working techniques:

Different types of collaboration e.g. open, closed, virtual:

- Creating a trusting environment
- Setting clear objectives and actions
- Achieving 'buy-in', the personal benefits of collaboration
- Seeking views of others
- Seeking specialist advice and support to enable delivery against plans, in accordance with organisational policy
- Adapting approach to meet changing priorities.

Networking:

Establishing a mutually beneficial relationship e.g. informing others of benefits

Creating new customers, new contacts and referrals

Visibility, staying current

Collaborating and problem solving

Sharing knowledge and experience with stakeholders.

LO3 **Interpret customer information to communicate effectively using a range of written, verbal and non-verbal communication**

Different types of non-verbal communication tools:

Internal business communications: use of the internet, cloud technology, mobile technologies, applications

Task management and tracking software: use of Smartsheets®, Microsoft Excel® spreadsheets, productivity software e.g. Trello® and ClickUp™

Different types of sales software and customer relationship management systems

Use of visual media for presenting images, tables, layouts e.g. specialist software and hardware

Use of social and digital media for market research, promotions and advertising, managing the customer experience

Copyediting and proofreading for clear and innovative copy prior to publishing marketing communication.

The marketing brief:

The purpose of a marketing brief

The elements of a marketing brief; covering the business, marketplace, product and audience.

Verbal communication tools and skills:

Presentation and 'pitching' skills including audience awareness, research and sensitivity, competitor research

Business and product narratives

Structure and time

Verbal and non-verbal communication to meet audience requirements

Presentation, behaviour and conduct of presenter e.g. attire, attitude, suitability for audience, preparation and organisation

Projecting high professionalism, demonstrating passion, and enthusiasm

Verbal communication skills e.g. active listening, asking open ended questions, seeking clarification, speaking clearly and concisely.

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LO4 **Apply technical skills using an Excel spreadsheet to report on marketing activities**

Different marketing activities:

Planning marketing activities: creating social media posting schedule, content calendar, editorial calendars, project managing marketing campaign activities using a work breakdown structure

Reviewing KPIs: using data to measure how effective different marketing tactics are at increasing leads, conversion rates and customer satisfaction from a range of different platforms. Tracking KPIs and performance

Tracking and monitoring data analytics e.g. creating marketing heat maps, Google Ads Campaign tracker to track when your users interact with your content the most. Use of heat maps to make a data-driven decision about when to be most active on social sites, and when to target different audiences.

Budget preparation and budgetary control:

Budgets for different marketing activities including personnel costs, online and offline marketing, overheads, product marketing.

Producing a spreadsheet:

The numerical and other information requirements for a spreadsheet and how it should be structured to meet user needs

Using a spreadsheet and techniques to enter, edit and organise numerical and other data

How to format spreadsheet cells, rows, columns and worksheets effectively using appropriate tools and techniques

Use of formulas and filters to enter, edit and present numerical data e.g. Vlookup and pivot tables

Visual representation of data and data analysis using pie charts, bar charts and graphs

Inserting spreadsheet data into Word® documents.

Learning Outcomes and Assessment Criteria

<table>
<tr><th>Pass</th><th>Merit</th><th>Distinction</th></tr>
<tr><td colspan="2">LO1 Apply a range of interpersonal skills and different approaches to stakeholder and customer relationship management</td><td rowspan="2"></td></tr>
<tr><td>P1 Apply a range of interpersonal skills and different approaches taken to customer relationship management in a chosen organisation.

P2 Examine how shared goals and values and mutual respect help develop effective relationships.</td><td>M1 Assess the value of effective interpersonal skills in creating strong internal and external stakeholder relationship management in a chosen organisation.</td><td>D1 Make recommendations for improving relationship management based on critical reflection.</td></tr>
<tr><td colspan="2">LO2 Work collaboratively within a team to share good practice for continuous improvement</td><td rowspan="2"></td></tr>
<tr><td>P3 Collaborate in a group project to identify and share good practice and work collaboratively with others in line with organisational requirements.

P4 Demonstrate positive effective interpersonal skill, and behaviours to build trust.</td><td>M2 Apply effective collaborative techniques to successfully meet the organisational requirements.</td><td>D2 Adapt interpersonal skills and behaviours to improve and enhance collaboration.</td></tr>
</table>

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Pass	Merit	Distinction
LO3 Interpret customer information to communicate effectively using a range of written, verbal and non-verbal communication		
P5 Produce a marketing brief for a marketing campaign to meet stakeholder requirements. **P6** Present the marketing brief using a range of written, verbal and non-verbal communication to effectively meet a stakeholder requirements.	**M3** Communicate using a range of written, verbal and non-verbal communication skills to match stakeholder expectations.	**D3** Respond to stakeholder requirements through a range of effective communication that exceed expectations.
LO4 Apply technical skills using an excel spreadsheet to report on marketing activities		
P7 Create an Excel spreadsheet for a marketing activity to meet specific marketing objectives.	**M4** Create a detailed spreadsheet that provides a visual aid that is clear and well-structured using a range of Excel functions.	**D4** Create a high impact Excel spreadsheet to meet specific marketing objectives using reporting dashboard and visuals.

Recommended Resources

Textbooks

Coughter, P. (2019) *The Art of the Pitch: Persuasion and Presenting Skills that Win Business*. New York: Palgrave Macmillan.

O'Brien, J. (2022) *Supplier Relationship Management: Unlocking the Value in Your Supply Base*. 3rd Ed.London: Kogan Page.

Websites

www.mindtools.com	Mind Tools Communication Skills (General reference)
www.skillsyouneed.com	Skills You Need Interpersonal Skills (General reference)

Unit 6: Products, Content and Multi Channels

Unit code	**L/650/7202**
Unit level	**4**
Credit value	**15**

Introduction

Creating brand awareness among customers at a minimal cost is key for all businesses as they strive to create a seamless experience for consumers to interact with their brand through multimedia options. Integrated marketing communication helps in integrating all the essential components of marketing to communicate a similar message to potential and existing end-users.

This unit is designed to develop students' knowledge and understanding of marketing communications and the techniques used for product management. They will learn underpinning tools and techniques of marketing and be able to relate them to real-world examples. An organisation may create and develop a revolutionary new product or service, but they need to manage products throughout the product lifecycle and use the most appropriate methods of promoting it to their target audience at different stages of the product lifecycle: this is the role of marketing communications. We encounter hundreds of promotions every day of our lives and the challenge for marketers is to be able to cut through the multitude of communications from potential competitors to deliver and reinforce the association with the brand.

The knowledge, understanding and skill sets which students will gain on successfully completing this unit will enable them to coordinate and maintain key marketing channels (both digital and online) to support marketing activities for future marketing campaigns.

Learning Outcomes

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

LO1 Explain the product or service lifecycle stage of an organisation's products or services portfolio

LO2 Present a multimedia marketing communications plan for a specified product or service

LO3 Produce appropriate content for a marketing channel that meets communication objectives

LO4 Recommend methods for monitoring and evaluating multimedia channels to maximise reach.

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Essential Content

LO1 Explain the product or service lifecycle stage of an organisation's products or services portfolio

Principles of new product/service development:

Ideas generation, ideas screening/selection, creative methods, concept testing, conducting marketing research and business analysis

Risks associated with new product/service development: competitor activity, customer behaviour, macro factorial and internal technical changes, levels of investment and change of strategic aims

Minimising the risk of new product failure: compatibility, trialability, observability and complexity

Minimising the risks in service management: intangibility, perishability, inseparability and variability

The use of digital technology to accelerate product development e.g. Artificial Intelligence (AI), Internet of Things, cloud computing in researching, designing, testing and development of new products and services

The use of emerging technologies e.g. using VR to showcase not only existing products but also how new products are being developed.

Product lifecycle management:

The stages of the product lifecycle: development, introduction, growth, maturity, saturation and decline

The definition of product management for the process of overseeing the development, launch and lifecycle of a product.

The purpose of product management e.g. to ensure that the product meets the needs of the target market and is financially successful for the company.

Product portfolio management, and benefits and purpose of having a product portfolio

The different roles of product management e.g. defining the product's features, coordinating with cross-functional teams to ensure the product is built and delivered on time and within budget, and working with sales and marketing teams to promote and sell the product

Product management at different stages of the product lifecycle e.g. repositioning and revitalising the product at maturity and saturation stage

Product management to meet changing consumer demand during the product lifecycle e.g. growing demand for sustainable products that are responsibly sourced or manufactured e.g. 'environmentally or ethically sourced' labelling such as Fairtrade, Rainforest Alliance or organic.

LO2 **Present a multimedia marketing communications plan for a specified product or service**

Factors to consider in a marketing communications plan, including objectives, audience and message:

- What are the objectives?
- Who are the target audience?
- How is the product/brand positioned to meet their needs?
- What is the budget?
- What channels should be used?
- What is the call to action?
- How to control the whole process once implemented?
- What was the measurable outcome?

The different channels of marketing communications, including paid media, earned media, owned and shared media

Identifying the most appropriate channel selection and rationale to maximise coverage across media and target specific audience

Online communication channels e.g. email marketing, social media vs offline communication channels e.g. direct marketing, trade shows and events, radio and television

The marketing communications mix, including advertising, sales promotion, public relations, sponsorship, direct marketing, exhibitions and trade fairs, personal selling, digital marketing, product placement, merchandising, ambient media and new media

Digital platforms, including webpages, podcasts, videos, X (Twitter) feeds, multimedia news releases, blogs

The features and benefits of different marketing communications channels and media, and when and how to apply these.

LO3 **Produce appropriate content for a marketing channel that meets communication objectives**

Communication objectives:

Integration of communications objectives e.g. raising awareness, increasing leads, driving purchase

The role of marketing communications in promoting and developing brands in terms of awareness, associations, perceptions and building customer loyalty, managing change

Ethical marketing and being honest and transparent in communications.

Appropriate design and content:

Different types of content e.g. TV, outdoor, Instagram, X (Twitter), Facebook, and other social media platforms and posts, to launch a specific campaign

Creating content tailored for each target audience, subset and stage of the customer journey, focusing on awareness, conversions and nurture, and mapping the customer journey

The use of website pages and direct marketing material e.g. leaflets, posters, flyers, landing pages

Distinct brand assets e.g. colours and symbols as brand-building tools

The importance of visual art design, typography and page layout

Website design and development with e-commerce capabilities

Creativity in marketing communications activities and different strategic approaches e.g. product/consumer orientated, think/feel/do approaches

Creating consistency across communication messaging and the brand 'look and feel' to achieve overall marketing strategy

The value of creating compelling, impactful storytelling and narrative

Building the content calendar

Regulations and marketing communications

Implementation using a variety of digital and AI tools

Measuring the outputs and success.

LO4 **Recommend methods for monitoring and evaluating multi-media channels to maximise reach**

Methods:

Methods for different types of communication channels; internet cookies, click throughs, impression; social media data analytics; response cards for direct marketing; pre and post testing of advertising message effectiveness

Online measurement e.g. shares, likes, response rate, call tracking metrics of financial measures e.g. return on investment, sales, and leads of non-financial measures e.g. brand awareness, website traffic, social media engagement, blog post visits, landing-page conversions

Linking of effectiveness measure to objectives e.g. engagement, sales, customer growth, customer interest, budget of cost of communications versus campaign/plan deliverables, and key performance indicators e.g. Return On Investment (ROI).

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Learning Outcomes and Assessment Criteria

<table>
<tr><th>Pass</th><th>Merit</th><th>Distinction</th></tr>
<tr><td colspan="2">LO1 Explain the product or service lifecycle in the context of an organisation's product or service portfolio</td><td rowspan="2">D1 Recommend appropriate marketing strategies for managing the portfolio at different stages of the product lifecycle.</td></tr>
<tr><td>P1 Examine an organisation's portfolio to explain the range of products or services they offer.
P2 Explain at which stage products or services are at in the product lifecycle and the impact it has upon marketing.</td><td>M1 Analyse the organisation's product or service portfolio in terms of the lifecycle of products or services.</td></tr>
<tr><td colspan="2">LO2 Present a multimedia marketing communications plan for a specified product or service</td><td rowspan="4">LO2 and LO3
D2 Create a strategic multimedia marketing communications plan and effective content for a marketing channel to successfully meet communication objectives.</td></tr>
<tr><td>P3 Identify multimedia communication objectives for a given organisation's product and/or service.
P4 Present a multimedia marketing communications plan to achieve specific communication objectives for product and/or service.</td><td>M2 Produce a detailed multimedia marketing communications plan that includes SMART communication objectives.</td></tr>
<tr><td colspan="2">LO3 Produce appropriate content for a marketing channel that meets communication objectives</td></tr>
<tr><td>P5 Create content for a marketing channel to meet specified communication objectives.</td><td>M3 Create content for a marketing channel to meet specified communication objectives in line with business objectives.</td></tr>
<tr><td colspan="2">LO4 Recommend methods for monitoring and evaluating multimedia channels to maximise reach</td><td rowspan="2">D3 Justify recommendations for the monitoring and evaluation of a multimedia marketing communications plan.</td></tr>
<tr><td>P6 Recommend methods for monitoring and evaluating a multimedia marketing communications plan linked to marketing strategy.</td><td>M4 Recommend methods for monitoring and evaluating a range of multimedia marketing channels aligned to marketing strategy.</td></tr>
</table>

Recommended Resources

Textbooks

Fill, C. and Turnbull, S. (2023) *Marketing Communications*. 9th Ed. London: Pearson.

Smith, PR, and Zook, Z.E. (2023). *Marketing Communications: Integrating Online and Offline, Customer Engagement and Digital Technologies*. 8th Ed. London: Kogan Page.

Tuckwell, K. (2019). *Integrated Marketing Communications*. 5th Ed. London: Pearson.

Websites

www.cim.co.uk	Chartered Institute of Marketing (General reference)
www.greatideasforteachingmarketing.com	Great ideas for teaching marketing Free activities (General reference)
www.marketingteacher.com	Marketing Teacher All sections (General reference)

Unit 7: Marketing Strategy and Planning

Unit code	**M/650/7203**
Unit level	**4**
Credit value	**15**

Introduction

Developing plans and strategies for marketing today is a complex process. There is an incredible and increasing choice of interactive devices, platforms and channels that potential customers use from smartphones and tablets to social networks and search engines. Investment in traditional channels e.g. TV, print and radio is declining, but they remain an essential part of integrated campaigns for many businesses. However, regardless of the channels available students need to research customer needs and define a strategy to develop winning brand propositions for different target segments and communicate them effectively.

This unit is designed to introduce students to the marketing planning process, conducting an audit and setting marketing objectives, to produce a marketing plan that maximises marketing opportunities. Students will be able to plan and deliver tactical campaigns against SMART (Specific, Measurable, Achievable, Realistic, Time-bound) objectives. They will also be able to develop a marketing implementation plan that outlines the exact steps and actions needed to be taken to achieve the marketing plan objectives.

The knowledge, understanding and skill sets which students will gain on successfully completing this unit will help students in a future marketing role in conjunction with the Marketing Manager who will define the overall marketing strategy, to shape, support and deliver marketing plans.

Learning Outcomes

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

LO1 Conduct situational analysis as part of the marketing planning process to inform strategic decision-making

LO2 Produce a marketing strategy for an organisation and set marketing objectives

LO3 Design a marketing plan with appropriate control mechanisms to measure and monitor progress

LO4 Apply agile working practices to address issues, challenges and discrepancy in performance for an implemented marketing plan.

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Essential Content

LO1 **Conduct situational analysis as part of the marketing planning process to inform strategic decision-making.**

Stages of the marketing planning process:

Situational analysis: identifying opportunities using 5 C-analysis, SWOT/PEST analysis and reviewing effectiveness of the current marketing mix to achieve sustainability goals

Marketing strategy: define target audience using market segmentation and target market selection and profiling

Setting goals and SMART (Specific, Measurable, Achievable, Realistic, Timely) objectives

Marketing mix: creating a marketing plan and tactics applied to the marketing mix to specifically meet marketing goals and objectives, to meet the overall sustainable business objectives

Implementation of the marketing plan: allocation of resources, put plan into action

Monitoring and control measures: monitoring customer feedback, measuring market sales, monitoring expenditure to maintain budget and maximise profitability, setting market share milestones.

Purpose of situational analysis:

To identify opportunities and potential challenges, to develop appropriate marketing strategies

To create a detailed profile of the target market, including their needs, wants and pain points

To identify unique selling points and determine what sets the organisation apart from its competitors and use this information to create a unique value proposition

The different types of frameworks and analysis for environmental scanning and forecasting:

Stakeholder analysis and stakeholder matrix e.g. use of Mendelow matrix, stakeholder mapping and the salience model.

Environmental analysis using PESTLE and Porter's 5 Forces model e.g. to assess competition, rivals and threats

Boston Consultancy matrix to classify products and the product portfolio

Strategic positioning for product and growth e.g. Ansoff's growth vector matrix

Organisational audit and the use of SWOT analysis, benchmarking indicator

Conducting market research as part of the marketing process to gather information about the target market, including demographics, buying habits and competitors

Extended market research and auditing.

LO2 Produce a marketing strategy for an organisation and set marketing objectives

Setting an overall marketing strategy and marketing objectives:

The definition and meaning of strategy

The role of strategy to achieve marketing objectives and goals, strategic intent and different strategic direction

Importance of marketing strategy alignment with overall business mission, vision and objectives to meet sustainable growth and performance

Different types and examples of marketing strategy e.g. promotional strategy, social media strategy, go-to-market strategy, digital marketing strategy, content strategy

Balancing short term marketing objectives to meet long term marketing strategy

Messaging of a marketing strategy setting the tone, conveying the meaning to be shared with stakeholders

Types of marketing objectives to achieve strategy e.g. customer satisfaction, maintain/increase sales/market share, maintain/increase revenue – build/increase brand awareness and loyalty, and develop/launch new goods and service

Defining marketing objectives as part of the marketing planning process e.g. clearly state goals and objectives of the marketing plan e.g. increasing brand awareness, boosting sales or expanding into new markets

The importance of understanding the target market, target market profiling, including buyer personas, identifying influencers and early adopters

Value positioning.

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LO3 **Design a marketing plan with appropriate control mechanisms to meet marketing objectives**

The marketing plan:

The purpose of a marketing plan

The links between marketing plans, marketing strategy and marketing objectives and alignment to overall organisation objectives.

Marketing plan steps to consider:

Develop a marketing mix: create a mix of marketing tactics to reach the target market, including product, price, place, and promotion. Develop marketing tactics that apply to the extended marketing mix and tactical planning

Develop a budget: allocate funds for the various marketing tactics in the mix and create a budget that is realistic and achievable

Create a timeline: develop a timeline outlining when various marketing tactics will be implemented and include specific milestones and deadlines.

Implementation steps to consider:

Implement the plan: put the plan into action, and track progress against the objectives, budget and timeline

Evaluate and adjust: regularly evaluate the plan's progress and adjust as needed to ensure that the marketing objectives are being met

Continuously monitor: continuously monitor the market trends, competitor's moves and consumer needs to make sure that the plan is relevant.

Control mechanisms:

Setting Key Performance Indicators (KPIs) to evaluate how effectively a marketing plan has been

Measurements of success e.g. Return on Investment (ROI), Customer Lifetime Value (CLV), Net Promoter Score (NPS)

Evaluating and monitoring performance of marketing plans using appropriate control and evaluation techniques e.g. sales analysis, market-share analysis, efficiency ratios and cost-profitability analysis to meet key performance indicators

Selecting appropriate metrics to monitor sustainability performance with the intention of driving the organisation to deliver on its greater purpose.

LO4 **Apply agile working practices to address issues, challenges and discrepancy in performance for an implementation marketing plan**

Marketing implementation plan:

Marketing plan vs implementing marketing plan

The benefits of a marketing implementation plan

Conducting research, set clear objectives and establish a realistic budget to create a marketing implementation plan

Marketing implementation elements e.g. budget, timelines and metrics for measuring success, specific tasks and responsibilities for each team member or department involved in the marketing efforts

Systems for tracking progress and adjusting as needed.

Feedback:

The importance of continuous review and feedback of marketing plan deliverables

Use of agile and flexible working practices; daily meetings, creating scrum teams, short sprints of activity, use of a product backlog

Plan, Do, Check, Act feedback loops

The cycle of collaboration, iterations, continual improvement and prioritisation.

Project management tools for managing marketing project/ activities:

Different types of software and application used to support project management e.g. Microsoft Project for tracking, managing and analysing projects and Asana for holistic project management and integration of workload, inbox, calendars and tasks

Use of project-planning tasks and tracking tools e.g. Trello, Smartsheet and Excel spread sheets

Tools and techniques used to create activity plans, work breakdown structure (WBS) and Gantt charts for effective planning.

Learning Outcomes and Assessment Criteria

<table>
<tr><th>Pass</th><th>Merit</th><th>Distinction</th></tr>
<tr><td colspan="2">LO1 Conduct situational analysis as part of the marketing planning process to inform strategic decision-making</td><td rowspan="7">LO1, LO2 and LO3
D1 Produce an evidence based strategic marketing plan for an organisation that measures achievement of overall marketing strategy and marketing objectives within key performance metrics.</td></tr>
<tr><td>P1 Conduct a situational analysis to determine internal and external opportunities and challenges.
P2 Apply appropriate methods and frameworks to support strategic decisions in marketing planning.</td><td>M1 Analyse the internal and external environment using appropriate methods and frameworks to understand an organisation’s capabilities, customers and environment.</td></tr>
<tr><td colspan="2">LO2 Produce a marketing strategy for an organisation and set marketing objectives</td></tr>
<tr><td>P3 Interpret information, data, and insights collected from a situational analysis to produce a marketing strategy and objectives.</td><td>M2 Analyse relevant information, data and insights gained from a situational analysis to justify marketing strategy and objectives.</td></tr>
<tr><td colspan="2">LO3 Design a marketing plan with appropriate control mechanisms to meet marketing objectives</td></tr>
<tr><td>P4 Develop a marketing plan that includes key elements of marketing planning and implementation for an organisation to achieve marketing objectives.</td><td>M3 Produce a detailed tactical marketing plan that integrates the extended marketing mix and appropriate control mechanisms to achieve marketing objectives.</td></tr>
<tr><td colspan="2">LO4 Apply agile working practices to address issues, challenges and discrepancy of performance for an implementation marketing plan</td><td rowspan="2">D2 Develop a marketing workflow that utilises project management software to support agile working.</td></tr>
<tr><td>P5 Design a marketing workflow process to support marketing implementation using agile approaches to address issues, challenges and discrepancies of performance.</td><td>M4 Develop a marketing workflow process for all content, projects and tasks to meet the specific marketing strategies.</td></tr>
</table>

Recommended Resources

Textbooks

Richardson, N. (2019) *Sustainable Marketing Planning*. 1st Ed. Oxford: Routledge.

Westwood, J. (2022) *How to Write a Marketing Plan: Define Your Strategy, Plan Effectively and Reach Your Marketing Goals: 4 (Creating Success)*. 7th Ed. London: Kogan Page.

McDonald, M. and Wilson, H. (2016) *Marketing Plans: How to Prepare Them, How to Use Them*. 8th Ed. Chichester: John Riley and Sons.

Websites

www.cim.co.uk	Chartered Institute of Marketing (General reference)
www.marketingdonut.co.uk	Marketing Donut (General reference)
www.marketingteacher.com	Marketing Teacher All sections (General reference)
www.hubspot.co.uk	Hub Spot (General reference)

Unit 8: Managing Marketing and Digital Communications

Unit code	**R/650/7204**
Unit level	**4**
Credit value	**15**

Introduction

Marketing communications is used by organisations of all sizes, in all sectors and in all countries. Digital marketing has made it easier for organisations to instantly connect with customers, gain feedback from campaigns and adapt their products to meet customers' needs. Customers use digital marketing to discover new products, ask questions, make purchases and share content. As a result, customer behaviour has changed, using different tools e.g. social media, search engines, online platforms, websites and emails. This has altered the way in which customers interact with organisations, which must adopt digital marketing practices and adapt in order to stay ahead. This fast-moving environment has been facilitated by new technology and constant access to the internet, although traditional marketing remains valid as not all customers may have access to digital devices. This means that digital and traditional marketing campaigns should be integrated to ensure consistency.

In this unit, students will explore the principles of marketing communications practice. They will develop a marketing campaign for a specific product or service. They will then review the effectiveness and potential contribution to the organisation. Students will learn how to be highly audience focused while developing creative, communication and project management skills, as they will be responsible for planning and executing tactical and targeted marketing activity.

The knowledge, understanding and skills sets which students will gain on successfully completing the unit will enable them to be equipped with good project and time management skills to deliver a range of projects/tasks/events as appropriate, including the ability to divide time effectively between reporting, planning and delivery.

Learning Outcomes

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

LO1 Explore the planning and delivery processes for a successful marketing campaign

LO2 Design a marketing campaign using multimedia to optimise content that targets key audiences

LO3 Co-ordinate a marketing campaign to an agreed deadline

LO4 Assess data and research findings to derive insights to support improvements for future campaigns.

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Essential Content

LO1 Explore the planning and delivery processes for a successful marketing campaign

Definition of a marketing campaign, the purpose, benefits, and campaign objectives:

Examples of different types of marketing campaigns e.g. brand awareness campaign, product launch campaign, seasonal push campaign

Examples of different types of marketing campaigns e.g. acquisition campaigns, monetisation and engagement

The use of digital platforms.

The marketing campaign planning:

Define campaign goals and objectives

Identify target audience and segment them based on digital platforms, offline platforms

Research and analyse the competition using a variety of online and offline tools

Select the channels and platforms to be used (e.g. direct mailing, radio, TV, social media, email, Pay Per Click)

Use the shared, owned, earned and paid for media framework to determine the media plan

Develop a content strategy and create content appropriate for different digital media assets and sizes

Set a budget and allocate resources

Create a schedule and timeline.

Marketing campaign delivery:

Implement the campaign on the chosen channels and platforms

Monitor and track campaign performance using analytics and metrics

Optimise and adjust the campaign as needed based on performance data

Engage with the audience and respond to feedback

Continuously measure and analyse campaign results

Report on campaign performance and Return on Investment (ROI).

LO2 **Design a marketing campaign using multimedia to optimise content that targets key audience**

Traditional tools and channels:

Features and benefits of different channels including advertising using TV, radio, newspapers

Direct mail campaigns using coupons, contests and offers that drive people to their products and services

Events and trade shows hosting a workshop, purchasing a table to demo products, or presenting a series of seminars, to build relationships that have both short-term and long-term earning potential.

Digital tools, platforms and channels:

Advantages and disadvantages of digital tools, platforms, channels

The use of digital tools, platform and channels for different types of paid, owned and earned media campaigns e.g. website, social media, apps (owned media), sponsored search advertising (bought media), likes, comments and shares (earned media)

Digital marketing techniques to encourage customer acquisition, conversion and retention e.g. search engine optimisation (SEO), display and video advertising, email marketing, pay-per-click advertising

Creating virtual experiences and storytelling using VR and augmented reality (AR) technologies, and the use of chatbots to personalise and engage customers

Reach, impact and cost effectiveness of digital marketing tools and techniques.

Marketing campaign design:

Campaign theme and the creative concept

Structuring the marketing campaign e.g. timescales, frequency

Factors to determine offer and desired audience 'call to action'

Design factors to provide a seamless customer experience e.g. mapping customer journey, consistent brand identity and messaging.

LO3 **Co-ordinate a marketing campaign to an agreed deadline**

Role of a marketing co-ordinator:

Responsibilities that include general administrative support, tracking sales data, organising promotions and events and researching competitor products

Creating the campaign content calendar to meet timescales and resourcing e.g. financial, physical, digital

Skills required; driven, tenacious, organised, interpersonal skills.

Tools for managing and co-ordinating campaigns:

Project management tools e.g. Trello, Asana, Hive

Management of email subscribers, using tools e.g. Hubspot, Mailchimp

Social media tools e.g. Later, Sproutsocial

Analytics tools e.g. Google Analytics

E-commerce tools.

Budget management:

Cost planning schedule to identify where costs fall to manage demand for resources

Use of a cost breakdown structure for all deliverables e.g. to allow budgets to be set, costs recorded and controlled

Systems and controls to monitor project budgets within their scope of work e.g. concept of earned value management, using variance analysis to review to compare actual performance to cost performance, integrating the budget to marketing activities, time-phasing budgets.

LO4 **Assess data and research findings to derive insights to support improvements for future campaigns**

Monitoring and measuring techniques:

Measures of campaigns using KPIs, measurable metrics and use of analytics platforms

Performance measures using metrics for both online and offline e.g. number of sales, pre-orders, consumer sentiment for the product, shares on social media, or how the campaign is perceived in the news

Calibrating and re-calibrating marketing efforts to align to goals.

Monitoring changes in the technological environment:

Tools and techniques for monitoring and reporting changes

Environmental scanning

Capturing and reporting on changes in the technological environment.

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Learning Outcomes and Assessment Criteria

<table>
<tr><th>Pass</th><th>Merit</th><th>Distinction</th></tr>
<tr><td colspan="2">LO1 Explore the planning and delivery processes for a successful marketing campaign</td><td rowspan="2">D1 Analyse planning and delivery processes for delivering a successful digital marketing campaign.</td></tr>
<tr><td>P1 Explore the components of the planning, and processes involved in delivering a successful marketing campaign.</td><td>M1 Discuss how the elements of a digital marketing campaign are attributed to the effectiveness and success of a campaign.</td></tr>
<tr><td colspan="2">LO2 Design a marketing campaign using multimedia to optimise content that targets key audiences</td><td rowspan="4">LO2 and LO3
D2 Design a digital marketing campaign that effectively applies online and offline media that appropriately target the audience.</td></tr>
<tr><td>P2 Design a marketing campaign using multimedia for a specific product or service.</td><td>M2 Design a marketing campaign that applies a creative concept to capture audience interest and inspire ‘call to action’.</td></tr>
<tr><td colspan="2">LO3 Co-ordinate a marketing campaign to an agreed deadline</td></tr>
<tr><td>P3 Co-ordinate the implementation of a marketing campaign within a given timeframe, using recommended tools and techniques.
P4 Present a campaign content calendar, and cost breakdown structure for deliverables to meet deadlines.</td><td>M3 Present a campaign content calendar that meets resource requirements within a given timeframe.</td></tr>
<tr><td colspan="2">LO4 Review data and research findings to derive insights to support improvements for future campaigns</td><td rowspan="2">D3 Recommend methods to overcome challenges and improve future marketing campaigns.</td></tr>
<tr><td>P5 Using key techniques and metrics gather feedback, and data on the effectiveness of a marketing campaign.
P6 Assess challenges of the stages in the marketing campaign to make improvements in the future.</td><td>M4 Evaluate the application of key measurement techniques and performance metrics used in marketing to support future improvements.</td></tr>
</table>

Recommended Resources

Textbooks

Chaffey, D. and Chadwick, F. (2022) *Digital Marketing. Strategy, Implementation and Practice*. 8th Ed. London: Pearson.

McDonnell, L. (2023) *2023 Social Media Content Planner: Consistently Better Content*. Orla Kelly.

Ruell, T. (2023) *Social Media Marketing 2023*. Independently published.

Websites

www.cim.co.uk	Chartered Institute of Marketing (General reference)
www.marketingdonut.co.uk	Marketing Donut (General reference)
www.digitalmarketinginstitute.com	Digital Marketing Institute Resources (General Reference)

Appendix 1: Mapping of HNC in Marketing Management for England against FHEQ Level 4

Key	
KU	Knowledge and Understanding
CS	Cognitive Skills
AS	Applied Skills
TS	Transferable Skills

The qualification will be awarded to students who have demonstrated:

FHEQ Level 4 descriptor		Programme Outcome
An outline knowledge of the scope and main areas of the subject(s) and its links with related subjects, and a more extensive knowledge of some of the key areas	KU1	Knowledge and understanding of the fundamental principles and practices of the contemporary business environment, and the role of marketing within the business environment
	KU2	Understanding and insight into the fundamentals of marketing theory that support the marketing process e.g. the extended marketing mix (7Ps: Product, Price, Place, Promotion, Physical environment, Process, People), product development and segmentation
	KU3	An understanding of the evolving concepts, theories and models within the study of marketing across a range of practical and hypothetical scenarios
	KU4	An ability to analyse and evaluate a range of concepts, theories and models to make appropriate decisions for marketing activities

FHEQ Level 4 descriptor		HNC Marketing Management Programme Outcome
An understanding of the major theories, principles and concepts	KU5	Understanding the principles of stakeholder management and customer relationship management (CRM), both internal and external, to facilitate effective cross-functional relationships internally, and channel and customer relationships externally
	KU6	Knowledge and understanding of approaches and models to plan and strategise effectively, including creating plans to deliver objectives and setting KPIs
	KU7	Understanding the principles of effective market research and how this can influence marketing activity e.g. valid data collection sources and methodologies and usage, including digital sources, and when to use quantitative and qualitative methods
	KU8	Knowledge and basic understanding of principles of product development and product/service portfolios
Familiarity with some of the routine materials, techniques and practices of the subject	AS1	Able to coordinate and maintain key marketing channels (both digital and online)
	AS2	To plan and deliver tactical campaigns against SMART (Specific, Measurable, Achievable, Realistic, Time-bound) objectives
	AS3	Use appropriate technologies to deliver marketing outcomes e.g. digital/web analytics, social media, CRM
Skills for the gathering, basic analysis, and presentation of routine information, ideas, concepts and quantitative and qualitative data within a clearly defined context. This will include the use of information and communications technology (ICT) as appropriate to the subject	CS1	The principles of effective market research and how this can influence marketing activity e.g. valid data collection sources and methodologies and usage, including digital sources, and when to use quantitative and qualitative methods
	CS2	Assimilate and analyse data and information from a range of sources to support marketing activities
	AS4	Effectively use appropriate business systems and software to deliver marketing outcomes efficiently, for example to analyse data, produce reports and deliver copy

Typically, holders of the qualification will be able to:

FHEQ Level 4 descriptor		Marketing Management HNC Programme Outcomes
Use their knowledge of the subject and its techniques in a routine manner to evaluate and formulate a range of arguments and solutions to problems and issues of a routine nature	CS3	Evaluate the effectiveness of marketing campaigns by choosing the appropriate digital and online data sources
	CS4	Evaluate data and research findings to derive insights to support improvements to future campaigns
	TS1	Effectively liaise with, and manage, internal and external stakeholders including suppliers to deliver required outcomes
	TS2	Monitor project budgets within their scope of work using appropriate systems and controls
Communicate the results of their study and other work accurately and reliably, and within structured and coherent arguments	AS5	Produce a wide range of creative and effective communications, including ability to write and proofread clear and innovative copy, produce project briefs, and give confident presentations
	TS3	Communication and listening, including the ability to produce clear, structured marketing communications in a variety of media
	KU9	Understand the use of different marketing communications channels and media, both digital and offline, and when and how to apply these
Undertake further learning within a structured and managed environment	TS4	Self-reflection: self-analysis and an awareness for continuing appetite for development
	TS5	Develop a willingness to learn from mistakes, and improve their own performance as a result.

Holders will also have:

FHEQ Level 4 descriptor		Marketing Management HNC Programme Outcomes
Apply their subject-related and transferable skills in contexts where individuals may have some limited personal responsibility, but the criteria for decisions and the scope of the task are well defined	TS6	A readiness to accept responsibility and flexibility, to be resilient, self-starting and appropriately assertive, to plan, organise and manage time

Table 8: Marketing Management HNC outcomes by FHEQ descriptor

Appendix 2: HNC Marketing Management Programme Outcomes for Students

	Knowledge skills										Applied skills					Cognitive skills					Transferable skills						
Unit	1	2	3	4	5	6	7	8	9		1	2	3	4		1	2	3	4		1	2	3	4	5	6	
1	x	x	x	x	x			x															x	x		x	
2	x	x	x	x				x								x			x					x		x	
3		x					x							x		x			x				x	x		x	
4	x				x									x		x							x	x		x	
5	x				x									x							x	x	x	x	x	x	
6		x				x	x	x	x		x	x	x	x		x							x	x		x	
7	x	x				x	x		x			x	x			x		x	x				x	x	x	x	
8		x	x	x		x	x		x		x	x	x	x		x		x	x		x	x	x	x	x	x	

Table 9: HNC Marketing Management Programme Outcomes for Students

Appendix 3: Transferable Skills Mapping

Level 4 Higher National Certificate in Marketing Management: mapping of transferable employability and academic study skills

Skill set	Cognitive skills							Intra-personal skills				Interpersonal skills		
Unit	Problem solving	Critical thinking/analysis	Decision-making	Effective communication	Digital literacy	Creativity	Numerical	Plan / prioritise	Self-management	Independent learning	Collaborative	Teamwork	Leadership	Cultural awareness
1		X	X	X	X			X	X	X	X			X
2		X	X	X	X	X		X	X	X	X			X
3	X	X		X	X	X	X	X	X	X				
4			X	X	X	X		X	X	X				
5	X			X	X			X	X	X	X	X	X	X
6			X	X	X	X		X	X	X		X		X
7			X	X	X	X		X	X	X		X		X
8			X	X	X	X		X	X	X	X	X	X	X

Table 10: Transferable skills mapping

October 2024

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