



Marketing

National Occupational Standards (NOS)

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URN	NOS Title
INSMAR001	Design and plan marketing research
INSMAR002	Collect and analyse marketing research data
INSMAR003	Interpret and present marketing research findings
INSMAR004	Develop, implement and evaluate a customer insight strategy
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INSMAR013	Develop and implement organisational marketing plans
INSMAR014	Identify market segments
INSMAR015	Develop new products or services
INSMAR016	Develop and implement pricing policy
INSMAR017	Identify distribution channels
INSMAR018	Manage the products or services portfolio to maintain competitiveness
INSMAR019	Develop strategies and plans for marketing campaigns and activities
INSMAR020	Develop and implement marketing campaigns and activities
INSMAR021	Forecast, review and evaluate performance of marketing activities

Overview

This standard is about designing and planning marketing research. You agree the objectives, timescale and budget for the research, identifying the key areas to be covered. You also consider the information sources and selecting research methods to meet the objectives. You design a marketing research plan, providing rationale for your approach and, if required, brief internal and external colleagues who will carry out the research. It is likely that you might work alongside an agency to undertake the research. The standard is for marketing professionals who design and plan marketing research.

Performance criteria

You must be able to:

1. identify and agree research objectives with decision makers
2. agree the general research approach with decision-makers
3. define the key research areas and questions
4. outline realistic timescales for conducting the research
5. agree a research budget with the budget holder(s)
6. identify sources of research information that match the key research areas and questions
7. select the research methods for collecting the required information
8. identify the risks associated with the research
9. specify how risks will be mitigated and managed
10. identify the relevant population samples
11. identify existing research materials that can be adapted
12. produce new research materials to meet the research objectives following organisational guidelines
13. design a marketing research plan for implementation
14. provide rationale for the approaches selected to decision-makers
15. agree the plan with decision-makers
16. brief internal and external colleagues to carry out the marketing research
17. provide support to colleagues to clarify the research requirements

Knowledge and understanding

You need to know and understand:

1. how to identify and agree research objectives
2. how to discuss and agree the general research approach with decision-makers
3. the importance of defining key research areas and questions and the impact this has on research projects
4. the principles, strengths and limitations of research methods for collecting information
5. the strengths and weaknesses of primary and secondary research
6. how to identify and select the most appropriate approach to a research problem
7. the key components of a research plan and why they are important
8. how to plan a research project within time and budgetary constraints
9. the types of risk associated with marketing research and how these can be mitigated
10. the components of a marketing research plan and how to write one
11. the sampling techniques that can be used in marketing research and how to select the most appropriate for the population
12. the types of research materials and how to select and write the most appropriate for a given piece of research
13. the types of internal and external colleagues involved in marketing research and their briefing needs
14. the current best practice and latest developments in research methods and materials
15. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Design and plan marketing research

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Relevant Occupations	Marketing and Sales; Marketing and Sales Manager; Marketing Associate; Marketing associate professionals; Marketing Officer
Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about collecting and analysing marketing research data. You use methods of collection and analysis that are consistent with the research objectives, operating within legal, regulatory and ethical requirements. You communicate with participants and use active listening to clarify points and check your understanding. You analyse the quantitative and qualitative marketing research information that you have collected, handling data in accordance with organisational guidelines. You document the outcomes and findings of your analysis in a format that meets the needs of the research audience. It is likely that you might work alongside an agency to undertake the research. The standard is for marketing professionals who collect and analyse marketing research data.

Collect and analyse marketing research data

Performance criteria

You must be able to:

1. review the marketing research plan and the objectives of the research with the research designer(s)
2. confirm the research parameters and targets with the research designer(s)
3. confirm the data collection and analysis requirements with the research designer(s)
4. confirm that participants understand the data collection process, the purpose of the research and the timescales involved
5. communicate with participants as outlined in the marketing research plan
6. present information to participants clearly, concisely and accurately
7. use active listening to clarify and check mutual understanding
8. collect marketing research data using the research methods specified in the research plan
9. record research findings accurately and fully, in accordance with the requirements of the research plan
10. prepare data in a format that matches the purpose and objectives of the research
11. apply methods of analysis relevant to the research objectives
12. analyse the data to the depth specified in the marketing research plan
13. investigate and analyse any identified variances in responses
14. seek guidance and clarification to aid your understanding, where necessary
15. maintain accurate records of data analysis following legal and organisational requirements
16. document the outcomes and findings of the analysis in a format that meets audience needs
17. meet the timescales specified in the research plan
18. conduct all research activities in accordance with legal requirements, industry regulations, organisational policies and professional and ethical codes of conduct

Knowledge and understanding

You need to know and understand:

1. how to confirm the purpose, objectives, research parameters and targets with the research designer(s)
2. the different methods involved in the collection of research data
3. the strengths and weaknesses of different research methods and when to use them
4. how the purpose of the research may influence levels of participant participation
5. how to respond to participant questions within the constraints of the research brief
6. how to communicate with participants following the research plan
7. how to record data accurately and fully in the context of different research projects
8. the techniques for preparing data for analysis
9. the principles, strengths and limitations of the analysis methods
10. how to select and use methods of analysis appropriate to research objectives
11. how to apply analysis methods to interrogate data for required information
12. how to create and maintain accurate records of analysis in accordance with organisational procedures
13. the differing research audiences and how to document the outcomes and findings of the analysis to meet their needs
14. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Collect and analyse marketing research data

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Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about interpreting and presenting marketing research findings by identifying patterns within the data. You resolve or highlight errors, inconsistencies, gaps and anomalies in the data, drawing conclusions based on the evidence. You also keep records and make reasoned recommendations in the format specified in the research plan, following legal and organisational procedures. The standard is for marketing professionals who interpret and present findings of marketing research.

Performance criteria*You must be able to:*

1. confirm the requirements for interpreting and presenting data with the research designer(s)
2. interpret the marketing research data using the methods specified in the research plan
3. confirm the reliability and validity of the findings
4. identify issues, trends, themes, linkages and interdependencies from the analysis of the marketing research data
5. resolve errors, inconsistencies, gaps and anomalies in the marketing research data
6. refer errors that you cannot resolve to the research designer to rectify these
7. identify and prioritise critical issues
8. justify the level of confidence, risks and assumptions on which the interpretation is based
9. seek guidance or clarification to aid understanding of the data, where necessary
10. justify conclusions based on the evidence
11. make reasoned recommendations based on the conclusions
12. present the findings, conclusions and recommendations in your organisation's specified reporting format
13. adapt reporting to meet different audience needs
14. maintain accurate data records and audit trails
15. conduct research activities in accordance with legal requirements, industry regulations, organisational policies, professional and ethical codes of conduct

Knowledge and understanding

You need to know and understand:

1. how to access and use the research plan in accordance with organisational policies and requirements
2. how to clarify the interpretation and reporting requirements with the research designer(s)
3. the methods of checking the quality of the data to prepare for interpretation
4. the issues that can arise during interpretation and how to respond in accordance with organisational research guidelines
5. the ways in which the quality of the data can affect marketing research findings
6. the methods for ensuring reliability and validity of data, including comparison with historical data and norms
7. how to identify trends, linkages and interdependencies in the marketing research data
8. the range of techniques can be used to resolve errors, inconsistencies, gaps and anomalies in data
9. what is meant by statistical significance and how to apply this in setting out levels of confidence
10. the importance of setting out risks and assumptions made in the interpretation of data
11. how to present reports following your organisation's style, tone and format
12. the strengths and weaknesses of different reporting and presentation formats and how to select the most appropriate format for the audience
13. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Interpret and present marketing research findings

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Overview

This standard is about the development, implementation and evaluation of a customer insight strategy. You identify information priorities in accordance with the marketing strategy, assessing the risks, resources, costs and benefits associated with accessing information. You establish how the information will be used and analysed to identify insights about the organisation's customers. You agree a plan, with timescales and budget, to collect the required information. The standard also involves checking the quality, validity and reliability of information and identifying insights that will inform marketing approaches. You make the information available to the organisation in accordance with legal, regulatory and ethical requirements. It also includes monitoring and evaluating the customer insight strategy against a set of agreed criteria and making recommendations based on the outcomes. The standard is for marketing professionals who are involved in developing, implementing and evaluating customer insight strategy.

Performance criteria

You must be able to:

Develop a customer insight strategy

1. identify the organisation's requirements for customer information
2. define how customer information is used in your organisation
3. identify priorities in customer information to meet the needs of the organisation's marketing strategy and related performance targets
4. assess existing information and identify further sources
5. establish how the information will be analysed and used to identify insights
6. assess the risks, resources, costs and benefits associated with accessing the customer information
7. seek additional advice and guidance from recognised sources of expertise
8. consult on the insight strategy with stakeholders and gain their commitment
9. agree the customer insight strategy and success criteria with decision-makers

Implement a customer insight strategy

10. confirm the customer information required, in accordance with the customer insight strategy
11. agree a plan to collect customer and industry information including timescales and budgets
12. collect customer information in accordance with agreed plan
13. check the quality, validity and reliability of customer information
14. analyse and structure customer information in an appropriate format
15. identify insights from customer information to inform marketing approaches
16. develop procedures for the storage, confidentiality, security, use and update of customer information, in accordance with legal, regulatory and ethical requirements
17. provide the agreed procedures to colleagues and stakeholders
18. monitor what customer information is accessed and used by colleagues and stakeholders

Evaluate a customer insight strategy

19. establish the criteria required for evaluation of the strategy
20. define when the strategy will be evaluated and the circumstances

in which an unscheduled review would be conducted

21. monitor continued compliance with legal requirements, codes of practice and organisational procedures
22. collect valid and comprehensive data, including feedback from customers and other stakeholders
23. evaluate the strategy against the agreed success criteria
24. make recommendations to modify or maintain the strategy

Develop, implement and evaluate a customer insight strategy

Knowledge and understanding

You need to know and understand: **Develop a customer insight strategy**

1. the organisation's marketing strategy and related performance targets
2. the organisation's actual and target customer base
3. the potential sources of customer information and how to access them
4. the factors to consider when identifying priorities in customer information that will meet the needs of the organisation
5. how to identify and assess potential risks in relation to customer information
6. the factors to assess when determining customer information requirements
7. the components to consider in developing a customer insight strategy
8. the internal and external sources of expertise that can provide advice and guidance
9. the purpose of consulting with stakeholders and how to gain their commitment

Implement a customer insight strategy

10. the ways that customer information requirements can be confirmed and how approaches may differ according to the organisation and customer base
11. the data collection and reporting systems used to gather customer information
12. the industry information that can be collected and how to use this
13. how to check the quality, validity and reliability of customer information
14. how to identify insights from customer information that will inform marketing approaches
15. how to develop procedures to store, use and update customer information that meet legal, regulatory and ethical requirements
16. the methods of ensuring the security of confidential data

Evaluate a customer insight strategy

17. how to select and apply appropriate data collection and analysis techniques
18. how to evaluate quantitative and qualitative information against the

agreed success criteria

19. the circumstances in which an unscheduled review would be necessary

20. how to summarise and present data to different audiences

21. how to make recommendations to modify or maintain the strategy and when this may be required

22. the legal, regulatory and ethical requirements relating to the collection, storage and use of customer information

Develop, implement and evaluate a customer insight strategy

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Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about developing and maintaining marketing information systems. It includes defining applications and data components for the systems. You consult users on the systems' requirements to develop a business case. You obtain agreement from stakeholders and decision makers and secure their support to develop the information systems. The standard involves checking the quality, validity and reliability of information. You maintain the systems, ensuring that they are integrated within wider organisational information systems and that any problems are resolved. The standard is for marketing professionals who develop and maintain marketing information systems.

Performance criteria

You must be able to:

1. identify the requirements for the information systems in accordance with your organisation's marketing strategies and plans
2. define the appropriate applications and data components required within the information systems
3. consult with users to establish system functionality requirements
4. develop a business case for the information systems
5. obtain agreement for the proposed information systems from stakeholders and decision-makers
6. identify stakeholders to support the information systems' development
7. specify the information systems' functionality
8. plan the development of the information systems
9. check the information systems are fit for purpose
10. integrate the information systems with other organisational information systems
11. consult systems' specialists during the stage of development, where necessary
12. check the quality, validity and reliability of information stored in systems
13. maintain the currency and accuracy of information stored in the information systems
14. monitor the use of the information systems following legal and organisational procedures
15. identify and resolve problems with the information systems
16. seek feedback from users of the information systems
17. evaluate the effectiveness of the information systems, to make recommendations for improvements

Develop and maintain marketing information systems

Knowledge and understanding

You need to know and understand:

1. your organisation's marketing strategies and plans and the potential applications of marketing information systems
2. how to determine the organisational requirements of the information systems
3. the different types of marketing information systems available and how to match them to organisational requirements and available resources
4. the data components that might be included within a marketing information systems
5. how to consult with users, stakeholders and decision makers and the roles that these play in developing a marketing information systems
6. the importance of developing a business case and the components that should be included
7. how to obtain agreement for implementation of an information system and why obtaining stakeholder or sponsor support is required
8. how to specify the functionality of the information systems to meet your organisation's requirements within timescales and budget
9. the importance of planning the development of the information systems and the colleagues that need to be involved to ensure that the plan is specific, measurable, achievable, realistic, and time-bound (SMART)
10. how to ensure full integration with other organisational information systems, the problems that may be encountered and how to resolve them
11. the types of internal and external systems specialists available and how to consult with them
12. how to check the quality, validity and reliability of information before adding it to the information systems
13. the importance of information accuracy and the impact that inaccurate information may have on your organisation
14. the implications of retaining out of date information for your organisation and customers
15. how to ensure the security of confidential data
16. the techniques that can be used to monitor system usage
17. how to seek feedback from users and evaluate its effectiveness

Develop and maintain marketing information systems

- against the organisation's requirements
18. the ways that you can identify and recommend improvements to the information system
 19. the legal, regulatory and ethical requirements relating to the collection, storage and use of information

Develop and maintain marketing information systems

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Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about planning, obtaining and evaluating stakeholder feedback. You agree requirements with decision makers and identify stakeholders who provide the feedback. You use formal and informal processes to obtain quantitative and qualitative feedback. The standard also involves planning to obtain feedback and implementing your plan to meet agreed target dates. You assess the currency, reliability and validity of the feedback information provided. You use the feedback to identify trends and patterns that align with the agreed requirements, assess any wider implications of your findings and recommend appropriate actions. This standard is for marketing professionals who plan, obtain and evaluate stakeholder feedback.

Plan, obtain and evaluate stakeholder feedback

Performance criteria

You must be able to:

1. agree the reasons for obtaining feedback with decision makers
2. identify the stakeholders to seek feedback from
3. identify the quantitative and qualitative feedback that is required
4. select formal and informal processes to obtain the required feedback
5. plan to collect feedback from stakeholders following organisational procedures
6. implement your plan and collect feedback within the agreed target date
7. maintain confidentiality and security when collecting feedback
8. assess the currency, reliability and validity of the feedback
9. identify trends and patterns relevant to the agreed purpose
10. evaluate the feedback to assess any wider implications for your organisation
11. share the feedback with other business functions and stakeholders, where appropriate
12. define actions arising from the feedback
13. recommend actions to decision makers to respond to the feedback
14. follow legal and organisational policies and procedures when obtaining feedback

Knowledge and understanding

You need to know and understand:

1. the reasons that your organisation has for obtaining feedback from stakeholders and how it is used
2. the variety of stakeholders from whom feedback can be gathered and how to engage them as groups and individually
3. the different types of feedback that can be collected from internal and external stakeholders
4. the importance of obtaining feedback confidentially and securely following your organisation's procedures
5. the formal and informal organisational processes for obtaining feedback
6. the importance of planning your approaches for obtaining feedback and the impact that this has
7. the analysis techniques that can be used to identify patterns and trends in feedback, and the technology that can support analysis
8. the factors to consider when assessing the currency, reliability and validity of feedback and why this is important
9. how to identify the interests of those providing feedback and determine conflict of interest and potential bias
10. the implications of conflicts of interest and bias on the reliability and validity of feedback
11. how to evaluate the implications of feedback for the organisation
12. how to recommend actions for your organisation in response to feedback
13. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Plan, obtain and evaluate stakeholder feedback

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Relevant Occupations	Marketing and Sales; Marketing and Sales Manager; Marketing Associate; Marketing associate professionals; Marketing Officer
Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about developing a customer-focused organisation. It includes identifying the ways that your organisation works with customers and developing a vision to make it more customer focused. You align your ideas with your organisation's values, brand and image and agree the approach with decision makers. The standard covers identifying and communicating your organisation's expected skills and behaviours to colleagues and role-modelling this yourself. You also influence policies, procedures and systems to continually improve customer-focussed approaches. The standard is for marketing professionals who develop a customer-focused organisation.

Develop a customer-focused organisation

Performance criteria

You must be able to:

1. identify how your organisation currently works with existing and target customers
2. develop a vision for developing a customer focused organisation
3. check that the vision is consistent with your organisation's values, brand and image
4. identify the expected staff skills and behaviours to create a customer-focused organisation
5. agree the vision for a customer-focused organisation with decision makers
6. communicate the vision to colleagues and customers
7. communicate your organisation's expected skills and behaviours to colleagues
8. demonstrate customer-related behaviours to role-model your organisation's expectations to colleagues
9. support colleagues to implement customer-focused skills and behaviours
10. challenge colleague behaviours that conflict with your organisation's expectations of them
11. influence the organisation's policies, procedures and systems to ensure that they are customer-focused
12. evaluate your organisation's goals to ensure customer-focused approaches
13. monitor and review goals, policies, systems and procedures against the vision
14. identify improvements to values, goals, policies, systems and procedures
15. implement changes to continually improve customer-focused approaches

Develop a customer-focused organisation

Knowledge and understanding

You need to know and understand:

1. the concept of organisational culture and how this influences the way that an organisation operates and presents itself to customers
2. your organisation's strategy for maintaining existing customers and attracting new ones
3. how to develop a vision for a customer-focused organisation
4. your organisation's values, brand and image and the impact that this has on existing and potential customers
5. the techniques that can be used to profile existing customers
6. the ways to identify target potential customers and understand their needs and expectations
7. the methods that can be used to communicate your organisation's vision and values to colleagues and customers
8. the importance of supporting the development and maintenance of colleagues expected skills and behaviours
9. the methods that can be used to influence goals, policies, systems and procedures to align with your organisation's customer-focused vision
10. how to identify behaviours that will support your organisation's values
11. the ways of influencing colleagues to change their behaviours when there are conflicts with your organisation's expectations
12. the goals, policies, systems and procedures that support the development of a customer-focused organisation
13. the importance of monitoring and reviewing how customer-focused your organisation is
14. the ways to identify and implement improvements
15. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Develop a customer-focused organisation

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Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about carrying out marketing activities in ways that comply with legal, regulatory and ethical requirements, and organisational values. It includes developing policies and procedures to ensure that these requirements are met, making sure that appropriate colleagues and stakeholders understand the implications for the organisation if policies and procedures are not followed and the importance of keeping up to date with current developments and best practice. The standard is for marketing professionals who have responsibility for ensuring that marketing activities comply with legal, regulatory and ethical requirements, and organisational values.

Performance criteria

You must be able to:

1. establish your organisation's values including any related competencies and guidelines
2. develop marketing policies and procedures to ensure that the organisation meets all current legal, regulatory and ethical requirements
3. confirm that marketing activities are aligned with your organisation's values
4. implement marketing policies and procedures in your organisation
5. communicate the marketing policies and procedures and to colleagues and stakeholders
6. check that colleagues and customers understand the policies and procedures
7. identify the implications for the organisation if marketing policies and procedures are not followed
8. monitor the use of marketing policies and procedures to check they are being adhered to
9. provide support to colleagues who are using the policies and procedures
10. encourage feedback from colleagues and stakeholders and take appropriate action if marketing policies and procedures are not met
11. maintain your knowledge of best practice regarding legal, regulatory and ethical requirements in marketing
12. review marketing policies and procedures in accordance with organisational requirements
13. update marketing policies and procedures to take account of new developments and best practice

Knowledge and understanding

You need to know and understand:

1. your organisation's values and any related competencies, and how to align these to your marketing activities
2. the importance of aligning marketing activities to your organisation's values
3. the legal, regulatory and ethical requirements that relate to marketing activities
4. the importance of aligning marketing policies and procedures with legal, regulatory and ethical requirements
5. how to develop marketing policies and procedures that take account of current legal, regulatory and ethical requirements
6. the communication techniques that can be used to share policies and procedures with colleagues and stakeholders
7. the potential implications for your organisation if marketing policies and procedures are not followed
8. how to communicate the impact of not following policies and procedures to colleagues and stakeholders and agree actions
9. the methods of monitoring the use of marketing policies and procedures
10. the actions that can be taken if marketing policies and procedures are not followed
11. the sources of information on current developments and best practice regarding legal, regulatory and ethical requirements in marketing
12. the importance of updating policies in accordance with new developments and best practice

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Overview

This standard is about assessing market opportunities and developing a business case. It includes identifying the ways in which markets operate and the needs for your organisation's products or services. You assess cultural and behavioural factors that impact on markets and make a realistic assessment of opportunities and threats to the organisation when entering, or expanding within, markets. The standard also includes developing a business case and marketing plan for a specific market. You consult with sources of expertise and forecast the potential return on investment (ROI). You assess opportunities and recommend a strategy for developing the market to decision makers. The standard is for marketing professionals who assess market opportunities and develop a business case.

Assess market opportunities and develop a business case

Performance criteria

You must be able to:

1. identify how markets operate, including any barriers to trade, entry or expansion
2. assess the environments and outlook of selected market opportunities
3. assess market needs for products or services
4. identify associated opportunities for your organisation linked to market needs
5. analyse how potential customers perceive and use the types of products or services offered by your organisation
6. assess the purchasing potential of customer groups within markets
7. assess the potential impact of cultural or behavioural factors on customers
8. identify potential competitors in markets
9. assess the strengths and weaknesses of potential competitors' marketing strategies and tactics
10. define your organisation's current business strengths and weaknesses
11. identify opportunities and threats for your organisation based on its strengths and weaknesses within current markets
12. define and agree the marketing objectives and develop a business case and marketing plan for a specific market
13. specify the physical, human and financial resources required to achieve the market potential
14. consult with internal and external sources of expertise
15. produce a forecast of return on investment (ROI)
16. identify the risks to the organisation of developing the selected market
17. recommend a strategy for developing the market, including possible options
18. state the risks, costs and benefits of possible options
19. identify the target customer groups, based on your assessment of their purchasing potential
20. present the business case and marketing proposals to decision makers
21. agree marketing proposals and actions with decision makers

Assess market opportunities and develop a business case

Knowledge and understanding

You need to know and understand:

1. the legal, regulatory and ethical requirements relating to your organisation's products and services within the market
2. the current and emerging trends and developments in the sectors that your organisation operates within
3. the potential barriers to trade, entry or expansion to markets and how these are overcome
4. the factors to consider when assessing the environment and outlook of markets
5. how to assess the needs of the different markets for the products and services that your organisation provides to identify opportunities
6. the importance of understanding how customers perceive and use the products and services that your organisation provides
7. how cultural and behavioural factors can influence the actions of potential customers and the impact this may have
8. how to identify competitors and compare their marketing approaches to your own organisations
9. how to conduct a PESTLE analysis to explore how political, economic, social technological, legal and environmental factors can influence the selected market
10. how to complete a SWOT analysis to identify and assess strengths, weaknesses, opportunities and threats to your organisation
11. how to develop a business case and marketing plan in accordance with your organisation's requirements
12. the different types of resources that are required to deliver marketing plans
13. the sources of internal and external expertise available to assist with developing market opportunities
14. the topics to be covered within a business case and marketing plan,
15. the different ways of entering or developing markets and their implications for the organisation
16. the risks associated with entering or developing new and existing markets and ways to mitigate them
17. how to develop possible options for marketing strategies and the ways to assess the best solution

18. the importance of identifying specific target customer groups based on an assessment of their purchasing potential
19. how to present a business case to decision makers and agree actions

Assess market opportunities and develop a business case

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Create or evolve a marketing strategy for an organisation

Overview

This standard is about creating or evolving a marketing strategy in accordance with an organisation's objectives and business plan. You review the organisation's current marketing approaches considering legal requirements, codes of practice and organisational policy. You take external and internal influences and trends into account and agree marketing strategy development timescales with decision makers. You create or evolve a marketing strategy and develop the criteria against which the strategy will be evaluated. You also assess risks and identify mitigating actions to manage these. The standard includes obtaining the agreement of decision makers to implement your strategy. The standard is for marketing professionals who create or evolve marketing strategies.

Create or evolve a marketing strategy for an organisation

Performance criteria

You must be able to:

1. identify the organisation's current marketing approaches
2. assess the current marketing strategy, if available
3. review existing marketing strategy against organisational needs
4. agree the timescales for the development of the new marketing strategy with decision makers
5. formulate strategic marketing objectives aligned to the organisation's overall strategy and business plan
6. identify the external and internal influences and constraints that affect marketing strategy development
7. analyse external and internal influences and trends to develop the marketing strategy
8. create or evolve the marketing strategy within the timescales agreed
9. assess the risks associated with the marketing strategy
10. outline how the risks will be mitigated
11. specify the criteria that the strategy will be evaluated against
12. seek advice and guidance from internal and external sources of expertise
13. assess the impact of the marketing strategy on other organisational functions
14. consult with stakeholders to gather feedback on the marketing strategy using the specified evaluation criteria
15. obtain decision-makers' agreement on the strategy
16. make adjustments to the strategy following feedback, in accordance with organisational needs
17. follow legal requirements, codes of practice and organisational policies and procedures when creating or evolving the marketing strategy

Knowledge and understanding

You need to know and understand:

1. the importance of researching the organisation's current marketing approaches and how to evolve this to develop their strategy
2. the situations when a new marketing strategy will need to be created and how to communicate this to decision makers
3. how to develop a marketing strategy that is based on an organisation's existing approaches
4. how to develop a new marketing strategy and the different approaches and formats that this may have
5. how to establish the links between a proposed marketing strategy and the organisation's overall strategy and business plan
6. how to assess the likely impact of the marketing strategy on other organisational functions
7. the current legal requirements, codes of practice and organisational policies and procedures
8. how to identify and consider the external and internal influences and constraints that could affect the development of the marketing strategy
9. the types of risks (market, competitor, stakeholder and business) associated with marketing strategies and how these can be mitigated
10. the internal and external sources of advice and expertise and how to access them
11. how to develop evaluation criteria to help decision makers take a structured approach to assessing your proposed marketing strategy
12. the ways to consult with stakeholders to gather their feedback about your proposed marketing strategy
13. how to gain support and agreement to a marketing strategy from the decision makers
14. how to make adjustments to the strategy and the circumstances when this will be required
15. the legal requirements, codes of practice and organisational policies and procedures that apply when creating and evolving marketing strategies

Create or evolve a marketing strategy for an organisation

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Relevant Occupations	Marketing and Sales; Marketing and Sales Manager; Marketing Associate; Marketing associate professionals; Marketing Officer
Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about developing a brand strategy. It includes agreeing the rationale and target market for the brand. You identify potential competing brands and interpret research to establish brand meaning, value and its promise. You confirm the characteristics that the brand is intended to communicate and collaborate with colleagues to select a name or design for the brand in accordance with its aims, objectives and purpose. The standard also includes registering and protecting the brand name and design in accordance with legislation when required and following organisational policies and procedures throughout. The standard is for marketing professionals who develop brand strategy.

Performance criteria

You must be able to:

1. agree the rationale for developing a brand with stakeholders
2. summarise the rationale for establishing the brand
3. identify the potential target markets for the brand
4. review existing brands in the market to identify potential competitors
5. interpret research to establish the brand's meaning, its values and promise
6. make recommendations to stakeholders based on research
7. confirm the final aims, objectives and purpose of the brand with stakeholders
8. agree the audience and target market for the brand
9. outline the main characteristics that the brand is intended to communicate
10. identify the benefits of the products and services to be associated with the brand
11. collaborate with colleagues to select a name and design for the brand that communicates the agreed characteristics
12. confirm that the brand name and design fits the target market and aligns with the aims, objectives and purpose of the brand
13. check that the name and design does not infringe existing brands
14. demonstrate that the name and design can be legally registered and protected if required
15. contribute to the development and publishing of brand guidelines
16. register and protect the brand name and design, if required
17. follow current regulatory and ethical requirements, codes of practice and organisational policies when developing a brand

Develop brand strategy

Knowledge and understanding

You need to know and understand:

1. the principles and methods for developing brand strategy
2. how to agree and summarise the rationale for establishing a brand with stakeholders
3. the issues to consider when deciding whether to brand products and services and how to make decisions about progressing the ideas
4. how to establish a target market for a brand using consumer and competitor research
5. the role of brand identity in marketing products and services and the potential impact of successful and unsuccessful branding
6. how new brands are affected by other existing brands and how to consider these when developing a brand strategy
7. the importance of the characteristics that make up a brand and how to ensure that they are integrated with organisational requirements
8. the ways that brand attributes can deliver benefits to the consumer
9. the issues to consider when selecting a brand name and design and how to manage them
10. the purpose of registering and protecting a brand name and design and how to do this
11. the potential consequences for your organisation and client of infringing existing brands
12. the contents of brand guidelines and how to develop them with colleagues and external specialists
13. the current regulatory and ethical requirements, codes of practice and organisational policies when developing a brand

Develop brand strategy

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Originating Organisation	Instructus
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Relevant Occupations	Marketing and Sales; Marketing and Sales Manager; Marketing Associate; Marketing associate professionals; Marketing Officer
Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about managing brand identity and corporate reputation. It includes promoting brand awareness and ensuring that all staff understand the importance of behaving in ways that are consistent with brand characteristics and values. You take action to manage brand feedback and ensure that business continuity plans reflect the need to manage the brand and protect the organisation's reputation. You also gather information on factors that affect customers' perceptions of a brand, adjust brand image in accordance with feedback, and manage negative feedback from customers. You develop plans to promote the brand in accordance with the organisation's marketing strategy, protect corporate reputation by ensuring brand guidelines are followed and monitor the success against agreed criteria. This standard is for marketing professionals who manage brand identity and corporate reputation.

Performance criteria

You must be able to:

1. promote awareness of the brand by communicating the brand characteristics and values internally and externally
2. confirm employees understanding of the brand characteristics and values
3. check that employees know the importance of behaving in ways that are consistent with the brand characteristics and values
4. assess the risks to the brand and corporate reputation and how these will be mitigated
5. check that business continuity plans take account of the need to manage the brand and protect the reputation of the organisation
6. gather valid and reliable information on perceptions of the current or proposed brand
7. take action to manage feedback on the brand
8. gather information on factors likely to affect customer perceptions of the proposed brand
9. assess the validity and reliability of the information gathered
10. adjust the brand image based on feedback from customers and stakeholders
11. communicate the brand image to customers
12. monitor the promotion of the brand image and identify strengths and weaknesses of the image
13. adapt promotional activities in accordance with the brand image's strengths and weaknesses
14. manage negative feedback from customers related to the brand
15. specify the actions that demonstrate the brand characteristics to customers
16. present brand characteristics to stakeholders
17. develop a plan to promote the brand in accordance with the organisation's marketing strategy
18. maintain the desired brand positioning to maximise return on investment
19. protect the brand, ensuring that brand guidelines are followed
20. monitor the brand image and success of the brand against agreed criteria
21. use the outcomes of brand monitoring to inform future brand development
22. follow current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to

brand identity and corporate reputation

Knowledge and understanding

You need to know and understand:

1. the range of methods that are available to promote the characteristics of a brand and their advantages and disadvantages
2. how to ensure that all staff understand why their behaviour needs to be consistent with brand characteristics and values
3. how to assess the risks to the brand and corporate reputation
4. the ways of mitigating risks to the brand and corporate reputation and the circumstances in which these should be used
5. the different sources of valid and reliable information on perceptions of the brand
6. how to track perceptions of the brand
7. the sources of information on customer perceptions
8. how to assess the validity and reliability of information on perceptions of the brand
9. the differences between customer demands, expectations, satisfaction and loyalty
10. the methods for promoting the characteristics of a brand and their advantages and disadvantages
11. the branding principles and methods that are used to promote and maintain corporate reputation
12. the role of branding identity in marketing organisational products and services
13. the importance of maintaining the desired brand positioning to maximise return on investment (ROI)
14. the contents of brand guidelines and their role in protecting the brand
15. how to develop criteria to monitor and evaluate the success of the brand and corporate reputation
16. the methods that can be used to monitor the success of a brand against agreed criteria
17. the ways that the outcomes of brand monitoring can inform future actions for brand development
18. the current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to brand identity and corporate reputation

Manage brand identity and corporate reputation

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Relevant Occupations	Marketing and Sales; Marketing and Sales Manager; Marketing Associate; Marketing associate professionals; Marketing Officer
Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about developing and implementing organisational marketing plans. It includes selecting information from marketing audits and confirming marketing objectives. You agree budgets for marketing activities and confirm the overall approach. You produce a marketing plan and establish the criteria by which the success of the plan will be evaluated. You identify resources, taking responsibility for the delivery of the plan, making necessary adjustments in accordance with the marketing strategy. You also identify good practice and areas for improvement. The standard is for marketing professionals who develop and implement organisational marketing plans.

Develop and implement organisational marketing plans

Performance criteria

You must be able to:

1. select information from marketing audits
2. confirm marketing objectives with decision makers as set out in the agreed marketing strategy
3. confirm the agreed budget for marketing activity with budget holders
4. identify and confirm the needs and characteristics of target customers
5. define the overall approach to carrying out marketing activities
6. evaluate potential marketing methods that are relevant to the target markets and the budget
7. assess the risks to marketing plans and how these might be mitigated
8. specify the actions and resources required to implement marketing plans
9. itemise the evaluation criteria for marketing plans
10. seek advice and guidance from internal and external sources of expertise
11. identify the human, physical and financial resources needed to implement marketing plans,
12. agree human, physical and financial resources requirements with decision makers
13. produce a marketing plan that summarises methods, actions, resources, timescales, budget and criteria
14. set up monitoring procedures to provide evaluation information
15. consult with stakeholders to gather feedback
16. amend marketing plans in accordance with feedback
17. agree the final marketing plan with decision makers
18. identify the stakeholders in the implementation process and gain their commitment
19. implement marketing plans, steering and influencing the implementation process to meet the agreed objectives
20. revise the marketing plan to align with the organisation's overall marketing strategy and needs
21. update stakeholders on revisions to the marketing plan and the impact on their activities
22. identify marketing good practice and areas for improvement during implementation of marketing plans
23. communicate marketing good practice and areas for improvement

to stakeholders

Develop and implement organisational marketing plans

Knowledge and understanding

You need to know and understand:

1. the current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to developing and implementing marketing plans
2. the content of marketing audits and how to make use of this information
3. how to confirm and clarify marketing objectives with decision makers
4. how marketing objectives link to marketing strategy
5. the importance of working within a budget and how to confirm this within organisational budget holders
6. the organisation's existing and target customer base and their needs and expectations
7. the range of marketing methods and how to select the most appropriate for the target market and agreed objectives
8. the types of risk to the marketing plan and how these might be mitigated
9. how to determine actions and resources required to meet agreed marketing objectives
10. the importance of identifying and agreeing resources to support the implementation of marketing plans
11. how to identify stakeholders and the human, physical and financial resources needed to implement the marketing plan
12. the internal and external sources of expertise that can provide advice and guidance
13. the areas that need to be included in a marketing plan and how to format this in accordance with organisational requirements and guidelines
14. how to develop monitoring arrangements to track progress against marketing implementation plans
15. the ways to gather information that can help evaluate the implementation of marketing plans
16. your organisation's structure and business processes in relation to marketing planning and implementation
17. how to influence implementation of the marketing plan with stakeholders
18. the sources of information for developing good practice in marketing and how to share this with colleagues

19. the methods for monitoring marketing plan implementation and the circumstances in which adjustments are required
20. how to make adjustments to the marketing plan during implementation and who may be consulted
21. how to identify and improve the development and implementation of marketing plans within your organisation

Develop and implement organisational marketing plans

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Relevant Occupations	Marketing and Sales; Marketing and Sales Manager; Marketing Associate; Marketing associate professionals; Marketing Officer
Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Identify market segments

Overview

This standard is about identifying market segments. You research the motivations, attitudes and behaviours of customers and use the outcomes to identify distinct clusters of customers. You identify measurable market segments then propose and test ideas to evaluate their potential stability, accessibility and profitability. You also make recommendations linked to return on investment (ROI) for the organisation. The standard is for marketing professionals who identify market segments.

Identify market segments

Performance criteria*You must be able to:*

1. prepare for researching the motivations, attitudes and behaviours of customers
2. identify the motivations, attitudes and behaviours of customers through research
3. identify distinct clusters of customers based on motivations, attitudes and behaviours
4. create a profile of established clusters to identify their distinguishing characteristics
5. identify market segments that are measurable in terms of size, buying power and profile
6. propose test plans for market segments
7. test ideas for market segments in accordance with the test plan
8. assess the viability of identified market segments, considering their potential profitability, stability and accessibility
9. recommend target segments that are likely to achieve the required returns on investment (ROI) for the organisation to decision makers
10. consult stakeholders on recommendations
11. amend recommendations in accordance with feedback
12. follow current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures when identifying market segments

Identify market segments

Knowledge and understanding

You need to know and understand:

1. how to prepare to conduct marketing research covering the motivations, attitudes and behaviours of customers
2. the importance and value of market segmentation when developing marketing strategy
3. what constitutes a market segment and how this differs from customer classification
4. the characteristics that might be relevant to establishing potential market segments
5. how to conduct research into customer motivations, attitudes and behaviours from which valid and reliable conclusions can be drawn
6. the factors that make market segments distinct and the reasons for determining distinctive segments
7. how to develop test plans to trial ideas with market segments
8. the different factors to consider in assessing the viability of identified market segments
9. how to forecast potential returns on investment (ROI) for target market segments
10. the mechanisms used to consult with stakeholders on your recommendations
11. how to amend recommendations taking account the feedback you have received
12. the current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures when identifying market segments

Identify market segments

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Originating Organisation	Instructus
Original URN	CFAMAR17
Relevant Occupations	Marketing and Sales; Marketing and Sales Manager; Marketing Associate; Marketing associate professionals; Marketing Officer
Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about developing new products or services. It includes agreeing a strategy in accordance with the organisation's overall marketing strategy and objectives. You generate ideas for new products or services. You test your ideas and develop business cases for new products or services and consult with stakeholders then present your ideas to decision makers. The standard also requires you to follow legal, regulatory and ethical guidelines. The standard is for marketing professionals who are involved in the development of new products or services.

Performance criteria

You must be able to:

1. agree a new product or service strategy that is in accordance with your organisation's marketing strategy and objectives
2. generate ideas for new products or services
3. identify the ideas that have most potential to meet customer and business needs
4. propose market test plans for products or services
5. test ideas for new products or services in accordance with the test plan
6. assess the market and profit potential of the new products or services
7. assess the nature of potential threats posed by competitors
8. prepare a business case for new the products or services
9. create a risk assessment for the new products or services
10. justify your recommendations for the development of the new products or services
11. consult with stakeholders on the business case to gather feedback
12. review assessments and feedback and update your business cases
13. present business cases to decision-makers
14. agree actions for the new products or services with decision makers
15. follow current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures when developing the new products or services

Knowledge and understanding

You need to know and understand:

1. your organisation's short, medium and long-term marketing strategies and objectives
2. the legal, regulatory and ethical requirements that relate to the development of new products or services
3. the contents of a new product or service strategy
4. the different sources of ideas for potential new products or services
5. the methods for identifying customer behaviour and customer and business needs
6. how to match ideas generated with customer and business needs
7. the importance of test plans and how to develop them
8. the advantages and disadvantages of different types of market tests and trials
9. how to assess the market and profit potential of the new products or services
10. the methods for identifying and analysing competitor activity
11. the different forecasting techniques that can be used and how to apply them in exploring the potential for new products or services
12. how to prepare valid business cases in accordance with organisational requirements
13. how to develop risk assessments and why this is important
14. how to consult with stakeholders and agree actions
15. the current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures when developing the new products or services

Develop new products or services

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Original URN	CFAMAR19
Relevant Occupations	Marketing and Sales; Marketing and Sales Manager; Marketing Associate; Marketing associate professionals; Marketing Officer
Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about developing and implementing a pricing policy for an organisation's products or services. You specify the pricing policy in accordance with the marketing strategies and objectives and take account of internal and external factors. You monitor the effectiveness of the policy and evaluate it against agreed criteria. You make justified recommendations for changes to the pricing policy with decision makers. The standard is for marketing professionals who develop and implement pricing policy.

Performance criteria

You must be able to:

1. specify a pricing policy for products or services in accordance with your organisation's overall marketing strategy and objectives
2. check that the pricing policy takes account of internal and external factors
3. agree the pricing policy with decision makers
4. monitor the effectiveness of the pricing policy against agreed criteria
5. develop criteria for measuring the effectiveness of pricing policy
6. agree criteria for measuring the effectiveness of pricing policy with decision makers
7. evaluate the effectiveness of the pricing policy against agreed criteria
8. assess the potential impact of pricing changes on stakeholders and the organisation
9. propose pricing policy changes to decision makers, making justified recommendations
10. follow current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures when developing and implementing pricing policy

Develop and implement pricing policy

Knowledge and understanding

You need to know and understand:

1. the pricing policy against your organisation's marketing strategy and objectives
2. how to price products or services
3. the internal and external factors that need to be considered when developing pricing policies
4. the types of cost involved and how these can impact on pricing policy
5. the methods that can be used to monitor pricing policy, when this should be done and how to capture information
6. how to develop and agree criteria for measuring the effectiveness of pricing policy
7. how to evaluate the effectiveness of pricing policy using agreed criteria to analyse information and draw conclusions
8. the situations when you should recommend that prices are increased and decreased
9. the importance of exploring the effects of price policy changes on stakeholders and the organisation
10. how to assess the potential impact of price policy change on the organisation
11. the current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures when developing and implementing pricing policy

Develop and implement pricing policy

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Originating Organisation	Instructus
Original URN	CFAMAR20
Relevant Occupations	Marketing and Sales; Marketing and Sales Manager; Marketing Associate; Marketing associate professionals; Marketing Officer
Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Identify distribution channels

Overview

This standard is about identifying distribution channels. It includes determining the organisation's objectives for its channels and the potential constraints they may have. You identify intermediaries and analyse target customer requirements from a channel. You also assess available distribution channels and identify those that support achievement of marketing objectives. The standard requires you to identify and mitigate risks and seek feedback from decision makers. The standard is for marketing professionals who identify distribution channels.

Identify distribution channels

Performance criteria

You must be able to:

1. determine the organisation's objectives for its channels of distribution
2. identify the potential constraints of distribution channels
3. identify the distribution options available, in accordance with organisational marketing strategy and objectives
4. identify intermediaries that might be required and their responsibilities
5. analyse target customer requirements from a distribution channel
6. assess potential distribution channels
7. assess the likely return on investment, costs, benefits and risks
8. identify ways of mitigating potential risks
9. outline the preferred options for distribution channels, justifying the recommendations made
10. seek feedback from decision makers on recommendations and action any changes they require
11. follow current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures when supporting the identification of distribution channels

Identify distribution channels

Knowledge and understanding

You need to know and understand:

1. the legal, regulatory and ethical requirements that relate to the distribution of products and services
2. the role of distribution in fulfilling an organisation's marketing objectives
3. the types of distribution channels, and their strengths, weaknesses and potential risks
4. the types of intermediary involved in distribution and their potential roles
5. how to mitigate potential risks and the circumstances when mitigating actions should be taken
6. the range of methods that can be used to analyse customer requirements from a distribution channel
7. the factors to be considered when assessing distribution channels, including return on investment (ROI), costs, benefits and risks
8. the importance of identifying and mitigating risks and how to do this in accordance with organisational procedures
9. how to justify recommendations for preferred distribution channels and consult with decision makers
10. how to agree actions with decision makers and make revisions to outline proposals
11. the mechanisms that can be used for consultation with stakeholders

Identify distribution channels

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Relevant Occupations	Marketing and Sales; Marketing and Sales Manager; Marketing Associate; Marketing associate professionals; Marketing Officer
Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about managing a portfolio of products or services to maintain competitiveness. It includes collecting and analysing performance data to identify trends and returns on investment. You assess the market share for a product or service and the stage of the lifecycle that a particular product has reached. You also assess the options and make recommendations for the management of the portfolio. You agree plans with stakeholders and implement them, monitoring and evaluating performance against the criteria and review them to respond to market changes. The standard is for marketing professionals who manage products or services portfolios to maintain competitiveness.

Performance criteria

You must be able to:

1. collect performance data for products or services
2. analyse performance data to identify trends and returns on investment
3. assess the market share of products or services to identify associated trends
4. assess the stage of the lifecycle that the products have reached
5. review the distribution channels and pricing policies
6. forecast potential future sales growth and market share
7. assess the options and justify recommendations for the management of the portfolio
8. present recommendations for the management of the portfolio to stakeholders
9. agree plans with actions and timescales for managing the portfolio with stakeholders
10. agree a budget for managing the portfolio with stakeholders
11. implement the agreed plan for the management of the portfolio
12. develop evaluation criteria to measure success
13. agree the evaluation criteria with stakeholders
14. monitor the performance of products or services against agreed plans
15. evaluate the performance of products or services against agreed criteria
16. monitor and assess the impact of competitor activities
17. revise plans to respond to competitor activities
18. follow the legal, regulatory and ethical requirements that relate to the management of products or services

Knowledge and understanding

You need to know and understand:

1. the methods of collecting and analysing performance data
2. how to identify trends when analysing performance data
3. the importance of returns on investment when analysing performance data
4. the product lifecycle and how to assess which stage a product has reached
5. the techniques used for forecasting sales growth
6. the techniques used for forecasting returns on investment and market share
7. the factors to consider when reviewing distribution channel and pricing policy
8. how to develop plans for managing a portfolio
9. the stakeholders involved in managing products or services and when to consult them
10. the different strategies for managing a portfolio and the circumstances in which these might be preferred
11. how to implement, monitor and evaluate performance of products and services against agreed criteria
12. how to monitor and assess competitor activities and their potential impact
13. the types of action that may be necessary to mitigate the impact of competitor activities and identify how to determine when they are required
14. the legal, regulatory and ethical requirements that relate to the management of products or services

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Original URN	CFAMAR22
Relevant Occupations	Marketing and Sales; Marketing and Sales Manager; Marketing Associate; Marketing associate professionals; Marketing Officer
Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about developing strategies and plans for marketing campaigns and activities. You evaluate customer trends and behaviour patterns. You set objectives and budgets that are consistent with the organisation's overall marketing strategies. You plan and define a realistic budget and identify resources to deliver marketing campaigns and activities. You also produce strategies and plans to achieve the objectives and agree these with decision-makers. The standard is for marketing professionals who develop strategies and plans for marketing campaigns and activities.

Performance criteria

You must be able to:

1. set objectives that are consistent with the organisation's marketing strategies and plans
2. identify the customer or audience segments at which the campaigns and activities are aimed
3. define key performance measures for marketing campaigns and activities
4. evaluate the trends and behaviour patterns of the target customers or audience and their implications for the campaigns and activities
5. define realistic budgets for campaigns and activities
6. identify the resources required to deliver the campaigns and activities
7. assess the strengths and weaknesses of different approaches to achieving objectives, taking account of potential returns on investment
8. forecast demands for products or services
9. develop contingency plans to deal with variations from the forecasts
10. seek advice and guidance on your forecasts from internal and external sources of expertise
11. produce strategies and plans to achieve objectives, aligned to the target markets
12. outline methods for monitoring and reporting outcomes against the objectives
13. consult with stakeholders on the strategies and plans
14. amend the strategies and plans in accordance with feedback
15. agree the strategies and plans with decision-makers
16. follow the current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to developing marketing strategies and plans

Knowledge and understanding

You need to know and understand:

1. the organisation's existing and potential customer base and their needs and expectations
2. how to develop objectives in accordance with the organisation's overall marketing strategy and plan
3. the key performance measures for marketing campaigns and activities
4. how customer trends and behaviour patterns can affect campaigns and activities
5. how to identify customer or audience segments for the organisation's products or services
6. how to assess strengths and weaknesses of different approaches to achieving the objectives, considering the potential returns on investment (ROI)
7. the different methods of forecasting demand for products or services
8. how to develop contingency plans to address variances from forecasts
9. the internal and external sources of expertise that can provide advice and guidance and how to access them
10. the importance of monitoring and reporting on outcomes following organisational guidelines
11. the ways that stakeholders can be consulted and the benefits of each approach
12. how to develop key performance measures and monitoring and reporting arrangements
13. the importance of consulting with stakeholders about your strategies and plans
14. how to amend strategies and plans in accordance with the feedback received
15. the current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to marketing

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Original URN	CFAMAR23
Relevant Occupations	Marketing and Sales; Marketing and Sales Manager; Marketing Associate; Marketing associate professionals; Marketing Officer
Suite	Marketing
Keywords	Marketing, sales, marketing management, market research, advertising, public relations

Overview

This standard is about developing and implementing marketing campaigns and activities in accordance with agreed strategies and plans. It includes confirming the objectives, budget and timescales for campaigns and activities and the needs and characteristics of target customers. You provide creative marketing ideas that meet the requirements of the campaigns and activities. You confirm the availability of necessary resources and staff and brief them about their roles and responsibilities. It also covers developing and agreeing appropriate marketing materials, delivering the campaign and activity, addressing variances and recording and reporting on outcomes. The standard is for marketing professionals who develop and implement marketing campaigns and activities, working alone or as part of a team.

Performance criteria

You must be able to:

1. confirm the marketing objectives as set out in the agreed strategies or marketing plans
2. agree the budget and timescale for the development of creative content
3. confirm the availability of required resources and staff with the decision makers
4. identify the needs and characteristics of target customers
5. define the key messages that need to be conveyed to customers
6. produce the evaluation criteria for the creative content
7. develop creative ideas by working with colleagues and team members
8. provide creative marketing ideas to meet the requirements of the campaigns and activities
9. evaluate ideas using your criteria to identify those that appeal to target customers
10. produce implementation plans for marketing campaigns and activities
11. brief staff on their roles and responsibilities in accordance with the campaign and activity strategies and plans
12. develop marketing materials in accordance with campaign and activity strategies and plans
13. agree marketing materials with stakeholders
14. implement your plans within budget and timescales
15. manage responses from customers in accordance with agreed organisational processes and procedures
16. monitor marketing activities against plans and budgets
17. identify variances during implementation and take actions to keep to agreed budgets and timescales
18. update stakeholders on progress, developments and issues as agreed during planning
19. report on the outcomes of the campaign or activities in accordance with organisational processes and procedures
20. follow current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to developing and implementing marketing campaigns and activities

Knowledge and understanding

You need to know and understand:

1. the organisation's current strategy and marketing plan
2. how to develop marketing objectives that align with marketing strategies
3. the organisation's existing and potential customer base and their needs and expectations
4. the importance of defining key messages for campaigns and activities and the impact this has on customers
5. the popular culture and social trends that impact on marketing campaigns and activities
6. how to work with colleagues and team members to develop campaigns and the benefits of collaborative working
7. the techniques that can be used to generate creative ideas and how to make best use of them
8. how to generate ideas that will differentiate the organisation and its products or services from those of its competitors
9. how to test and evaluate creative ideas
10. how to develop ideas which are innovative, distinctive and memorable and will meet the requirements of campaigns and activities
11. how to evaluate ideas against agreed criteria to determine which will appeal most to customers
12. the range of marketing methods available and how to match them to a marketing campaign and activity
13. the importance of checking that staff understand their roles and responsibilities within a particular campaign and activity
14. the types of marketing materials that support campaigns and activities and how to produce them
15. how to monitor activities against the strategies, plans and budgets
16. the types of risks and variances that can occur and the actions that can be taken to address these
17. the methods for recording and reporting outcomes in accordance with organisational requirements
18. the importance of updating stakeholders on progress
19. the ways that campaign outcomes are reported to meet organisational requirements and complete the campaign
20. the current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to the

creative content of marketing campaigns and activities

Develop and implement marketing campaigns and activities

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Overview

This standard is about forecasting, reviewing and evaluating performance of marketing activities. It includes forecasting, and identifying the indicators and metrics for reviewing and evaluating the success of marketing activities. You agree the key points at which marketing activities should be monitored and collect valid, reliable and comprehensive data. You analyse reasons for variations in performance and take actions to address them. The standard includes establishing and agreeing an evaluation framework, methodologies and resources and evaluating qualitative and quantitative data. You also assess the impact of marketing activities against agreed targets and measures and report on your evaluation findings. The standard is for marketing professionals who forecast, review and evaluate the performance of marketing activities.

Performance criteria

You must be able to:

1. identify organisational indicators and metrics for evaluating the success of marketing activities
2. provide forecasts against identified indicators and metrics
3. agree the indicators, metrics and forecasts with stakeholders
4. assess the impact of external factors on marketing performance
5. check that the indicators and metrics match the specific marketing outcomes to be monitored
6. agree timescales and key points for monitoring marketing activities
7. gather feedback from stakeholders
8. review marketing outcomes using agreed indicators and metrics
9. identify reasons for variations in performance and take actions to address them
10. agree specific, realistic and measurable evaluation targets and measures with stakeholders
11. design an evaluation framework
12. agree the most appropriate evaluation methodology and associated resources with stakeholders
13. collect valid, reliable and comprehensive data, including feedback from stakeholders
14. apply agreed methods to evaluate quantitative and qualitative data against agreed targets and measures
15. assess the impact of marketing activities and outcomes against agreed targets and measures
16. evaluate the quality, cost-effectiveness and cost-efficiency of the marketing activity against agreed targets and measures
17. report on the findings of the evaluation in the agreed format
18. identify improvements to inform future work
19. outline actions based on the evaluation results
20. follow current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to forecasting, reviewing and evaluating marketing activities

Knowledge and understanding

You need to know and understand:

1. the indicators and metrics against which the success of marketing activities can be measured
2. the range of methods that can be used for forecasting and how to select them
3. the organisational processes and approaches for forecasting
4. the political, environmental, social, technological, legal and economic factors that may impact on marketing performance
5. how to ensure that the indicators and metrics selected match the marketing activities
6. how to determine the timescales and key points at which marketing activities should be monitored
7. the different sources of valid and reliable data and how they are analysed
8. the importance of valid and reliable data
9. how to use indicators and metrics to review marketing outcomes
10. the actions that might be taken to address variations in performance following your organisation's guidelines
11. the circumstances when actions to address variations in performance might arise
12. the contents of an evaluation framework and how to develop this
13. the different methods that can be used for evaluation and how to select those that match the circumstances
14. how to apply evaluation methods
15. the types of improvements that can be identified through evaluation
16. how to use evaluation evidence to inform decisions about further actions
17. the importance of evaluating the quality, cost effectiveness and cost-efficiency of marketing activities
18. how to create action plans based on the evaluation results
19. the current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to marketing

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