

BSB 7.0

**BSBMKG433**

**UNDERTAKE  
MARKETING  
ACTIVITIES**

# **BSBMKG433**

## **Undertake marketing activities**

Release 1

## **Learner Guide**

Aspire Version 1.1



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## Before you begin

This Learner Guide is based on the unit of competency *BSBMKG433 Undertake marketing activities*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: [www.training.gov.au](http://www.training.gov.au).

## How to work through this Learner Guide

This Learner Guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the Learner Guide you need to read, and which Practice Tasks and Learning Checkpoints you need to complete. The features of this Learner Guide are detailed in the following table.

Feature of the Learner Guide	How you can use each feature
Learning content	Read each topic in this Learner Guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples	These highlight key learning points and provide realistic examples of workplace situations.
Practice Tasks	Practice Tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Summaries	Key learning points are provided at the end of each topic.
Learning Checkpoints	There is a Learning Checkpoint at the end of each topic. Your trainer will tell you which Learning Checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

## Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table provides definitions for each foundation skill.

Foundation skill area	Foundation skill description
Reading	<ul style="list-style-type: none"> <li>Interprets textual information obtained from a range of sources and determines how content may be applied to organisational requirements</li> </ul>
Writing	<ul style="list-style-type: none"> <li>Integrates information from a number of sources to develop material that supports purposes and format of documentation, using suitable grammatical structure and clear, logical language</li> </ul>
Oral Communication	<ul style="list-style-type: none"> <li>Participates in a variety of spoken exchanges using suitable language and non-verbal features</li> </ul>
Numeracy	<ul style="list-style-type: none"> <li>Collates and analyses numeric information relating to costs, timeframes and other activities</li> </ul>
Self-management	<ul style="list-style-type: none"> <li>Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader goals of work environment</li> <li>Takes responsibility for outcomes of routine decisions related directly to own role</li> </ul>
Problem solving	<ul style="list-style-type: none"> <li>Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts</li> </ul>
Planning and organising	<ul style="list-style-type: none"> <li>Develops plans to manage tasks with an awareness of how they may contribute to longer term operational and strategic goals</li> </ul>
Technology	<ul style="list-style-type: none"> <li>Identifies functions and key features of common digital systems and tools and operates them effectively to complete routine tasks</li> </ul>

## What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1: Prepare to undertake marketing activity	1A Identify marketing task requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Review marketing activities	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Develop, document and seek approval for action plan	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2: Coordinate marketing activities	2A Identify and access resources according to action plan	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Contribute to assigning responsibilities and assist marketing personnel	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Monitor the implementation of marketing activities according to the activity plan	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3: Review marketing activities	3A Measure and record outcomes against the marketing plan	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Review results against expected marketing plan outcomes	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Prepare a report of marketing activities and share it with relevant personnel	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident



## Topic 1 | Prepare to undertake marketing activities

- 1A Identify marketing task requirements
- 1B Review marketing activities
- 1C Develop, document and seek approval for action plan

# 1A Identify marketing task requirements

It's vital that marketing activities in organisations align with the broader marketing context in the organisation.

To prepare and complete marketing activities, you will need to have a basic understanding of marketing concepts and how they apply to the organisation's marketing efforts, as outlined in the marketing plan and organisational policies. This will include being familiar with marketing terms and how they apply to your organisation.

## The marketing concept

The marketing concept is built on the premise that an organisation's effort is focused on satisfying customer needs and achieving their corporate goals simultaneously.

The marketing concept is based on the idea that instead of persuading customers to buy what the organisation has produced, a marketing-oriented organisation aims to identify and produce what the organisation's customers want or need.

The table below outlines five concepts in the field of marketing that have evolved over time: production, product, selling, marketing and societal marketing.

<b>Production</b>	<ul style="list-style-type: none"> <li>The production concept was the earliest form of a marketing concept. Small producers made a product, which they sold for a profit. Like it sounds, it is focused on the production aspect of creating a product.</li> <li>The production concept doesn't focus particularly on customer's needs or wants. It focuses on low price and availability being attractive instead. It is the basis of mass production of product, where cheap production costs lead to a cheaper selling price.</li> <li>An example of the production concept is out-sourcing production to overseas manufacturing centres to lower business costs, which lowers the quality of the finished product.</li> </ul>
<b>Product</b>	<ul style="list-style-type: none"> <li>The product concept relates to the product itself rather than its production. It highlights quality, performance or innovative features in a product and in doing so, caters to customers' needs. It is based on the idea that continuous improvement and quality of their products will mean repeat business.</li> <li>Apple provides a good example of the product concept. Even though customers can buy a smartphone from another company that performs as well for a lower price, many customers continue to buy new releases of iPhones. The product concept falls short when customers want a new solution, rather than an updated version of the same product.</li> </ul>

<b>Selling</b>	<ul style="list-style-type: none"> <li>▪ The selling concept is based on the idea that you must convince a customer to buy your product. This can be through large scale advertising or selling techniques such as the hard sell. The selling concept focuses on increasing sales, whether the customer needs the product or not. The selling concept focuses on the company's existing products.</li> <li>▪ An example of this concept is Coca Cola's strategy of spending huge amounts of money on advertising despite the fact that customers are already very aware of their products.</li> </ul>
<b>Marketing</b>	<ul style="list-style-type: none"> <li>▪ The marketing concept focuses on customer needs. This concept is also known as the customer-first approach.</li> <li>▪ The marketing concept requires close knowledge of the target market and focuses on figuring out its needs, and meeting them effectively. It is about creating lasting customer relationships based on value and satisfaction. The marketing concept starts at what the customer wants, and then works backwards to create the product. It is about understanding the customer and being more effective and efficient at producing what they want.</li> <li>▪ An example of this is Samsung. They create their products by considering both their customers and competitors.</li> </ul>
<b>Societal marketing</b>	<ul style="list-style-type: none"> <li>▪ The societal marketing concept builds upon the marketing concept. Societal marketing is based on the principle that we should deliver value to customers in a way that is sustainable and improves society's well-being. It focuses on building long-term relationships with customers by meeting their needs, producing better products, and contributing to society.</li> <li>▪ Societal marketing believes that we have a moral responsibility to promote what is good for people, over what they may want. It is the opposite strategy from that of food fast companies.</li> <li>▪ One example of societal marketing is The Body Shop. They are well known for being against animal testing, and they advocate for community trade, transparent supply chains and minimising waste.</li> </ul>

Another important factor in marketing is customer value. Customer value is about the difference between a customer's impression of the benefits of the product and the costs of obtaining the product.

The value can be:

- functional (as provided by features of the product or the flexibility of services)
- monetary (perceived value for money by a customer)
- social (e.g. self-perception of a higher social status by buying branded products)
- psychological (e.g. a 'feel-good' experience from using ethical brands).

Each product or service should create value by satisfying customers' needs and generating benefits for them.

Creating and delivering for customers should be the driving force of an organisation's marketing activities, and a guiding principle for designing marketing strategies and marketing plans.

## Researching marketing practices

Before planning specific marketing activities, you need to understand your organisation's marketing approach by looking at the context in which the organisation operates and researching sources of marketing information.

The research sources will be both internal and external:

- **Internal sources** are your organisation's marketing plans, sales reports, customer feedback and relevant policies and procedures. Looking at internal sources will give you a more in-depth understanding of the marketing mix that your organisation delivers and the customer base it serves.
- **External sources include** information gathered by reviewing your organisation's competitive activities, industry trends and macro environmental forces.

## Customer profile

Customer-centric or customer-focused organisations that use the marketing concept or societal marketing approach aim at delivering customer value as their highest priority. To do this, organisations need to segment the market and identify their target customer so they can find out what they value. An effective way to target an ideal customer is to develop a customer profile or buyer persona, which is a vivid description of a fictional customer based on their demographic, social and cultural background, values and interests.

To create the customer profile, organisations should consider the following:

### Demographic

- └ The age, gender, race, education and residential area of your ideal customers. For example, a mobile coffee van may primarily target 25-45 year-old office workers and morning commuters.

### Psychographics

- └ This relates to behaviours and beliefs, including personality and lifestyle. For example, you should consider hobbies and interests or entertainment choices in order to understand how to communicate promotional messages and build rapport.

### Socioeconomics

- └ This includes household income and the area your customers live in. For example, a landscaping business's ideal customer would be one with a large lawn and garden, who is more likely to buy professional lawn care.

## Benefits sought

These can be tangible or intangible benefits sought by your ideal customer. Identify their biggest fears and anxieties, and how your product or service could help to alleviate their concerns.

For example, make-up companies appeal to image conscious customers by suggesting that their products help them look flawless on social media.

There are a range of profile and persona templates available online. An example of a free digital resource is available here: [aspirelr.link/customer-profile](https://aspirelr.link/customer-profile)

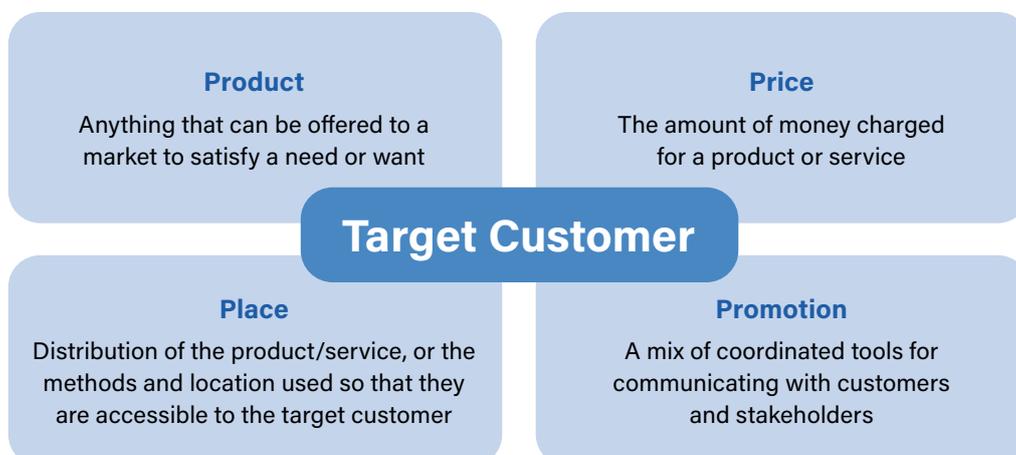
You can also segment and profile business buyers, also called B2B (business to business) customers, using a similar approach. This could involve researching:

- geographic (location or geographic spread of the business)
- demographic (industry or company size)
- benefits sought (user status, usage rate, or loyalty status)
- operating characteristics (the preferred way of doing business) and similar.

Gaining an in-depth understanding of the target customer (business or personal) will allow you to prepare the marketing activities you wish to implement.

## The marketing mix

The marketing mix is a marketing strategy tool describing a set of actions that companies use to promote their product or brand in the market. The traditional marketing mix consists of four things that the organisation blends to produce the response it wants in the target market: product, price, place and promotion.



## Product

Products include more than tangible objects such as cars, food items or mobile phones. The term 'products' can also include services, events and travel destinations.

Products can be classified into consumer products and industrial products:

Consumer products	Industrial products
<p>Consumer products include:</p> <ul style="list-style-type: none"> <li>convenience products (also called FMCG – 'fast moving consumer goods') such as toothpaste and fast food that are typically low priced and widely available</li> <li>shopping products such as major appliances, furniture and clothing, which require more consideration of brand and price</li> <li>specialty products, such as luxury goods that are distributed in exclusive outlets and are premium priced</li> <li>unsought products, such as life insurance, that have little interest or low awareness.</li> </ul>	<p>Industrial products are purchased with the purpose of further processing or for use in conducting a business. They include:</p> <ul style="list-style-type: none"> <li>materials and parts, such as raw materials (cotton, livestock) or natural products (iron ore, timber) and are sold directly to users</li> <li>capital items such as equipment (generators, elevators), portable tools and office equipment</li> <li>supplies and services that include operating supplies (paper, lubricants), maintenance items (paint, brushes), and business services (such as window cleaning, legal consulting, etc.).</li> </ul>

Cited in Armstrong, Kotler, & Opresnic (2019), "Marketing: An Introduction", 14th global ed., Pearson.

## Price

Price is the only element of the marketing mix that produces revenue. Prices are flexible, because unlike product features or distribution channels, they can be changed quickly.

Setting the right price starts with good knowledge of customers perceptions of value.

There are three main pricing strategies:

### Customer value-based pricing

This pricing strategy uses buyers' perceptions and not the product's cost as the key to pricing. Pricing begins with analysing consumer needs and value perceptions, and the price is set to match the consumer's perceived value. For example, Tiffany & Co. jewellery or premium French perfume brands.

### Cost-based pricing

Cost-based pricing is about setting prices based on costs for producing, distributing and selling the product, with a standard markup added on. Companies with lower costs can set lower prices which results in smaller margins but more sales.

### Competition-based pricing

This pricing strategy is about setting prices based on competitors' prices. This approach focuses less on production costs or the product's perceived value.

When introducing new products to the market, companies often apply two broad strategies:

- **skimming pricing** (setting a high initial price to increase revenues – for example, new-to-the market smartphone models)
- **penetration pricing** (setting a low initial price in order to attract a large customer base or increase a market share – for example, Ikea, which uses market penetration strategies to enter new markets).

## Place

The kind of products or services an organisation sells determines how they are distributed. Companies may decide to:

- sell directly and maintain full control of the process and price, for example, through an e-commerce channel or in-person
- sell through a reseller, wholesaler or retailer, which allows them to have a wider distribution. Some resellers may request that the product be sold under their brand or have specific requirements regarding product supply and payment terms.

Other marketing decisions related to the 'place' element of the marketing mix are about market coverage and intensity of distribution:

Intensive distribution	Selective distribution	Exclusive distribution
The widest distribution for a product or service – selling in as many locations as possible. This is commonly used by large manufacturers for consumer products, for example, supermarkets.	A distribution strategy used for selling products of a higher price and quality. This distribution method might require retailers to be trained on product knowledge and building customer relationships.	This distribution strategy gives exclusive rights to sell the company's products and services to one retailer in a geographic area. It is usually used by companies offering specialty products and promoted as prestigious brands, for example, Rolex.

## Promotion

Companies communicate their value propositions to customers using the promotional mix, which is a blend of advertising, public relations, personal selling, sales promotion and direct marketing tools.

<b>Advertising</b>	Any form of non-personal presentation by an identified sponsor. For example, broadcast, print, internet, and outdoor advertising.
<b>Public relations</b>	Building good relations and creating a positive corporate image. PR tools include press releases, sponsorships, special events and websites.
<b>Personal selling</b>	Personal presentation by a sales representative for the purpose of making a sale. Tools may include trade shows and virtual presentations.
<b>Sales promotion</b>	Short-term incentives to encourage the purchase of a product, such as discounts and coupons.
<b>Direct marketing</b>	Direct connection with the target customer to obtain an immediate response, using telemarketing, the internet and social networking sites.

## Services marketing in the marketing mix

Services fall under the 'product' category of the marketing mix, but there are significant differences in how they are treated compared with tangible products, such as a smartphone. Services include activities such as depositing money at the bank, flying on a plane, watching a movie or dining at a restaurant.

Distinctive features of services include:

- perishability: services cannot be stored
- intangibility: services create customer experiences that are not tangible – they cannot be touched or tasted

- inseparability: services can be delivered and consumed at the same time
- variability: services can vary in standard or quality from one provider to the next or from one occasion to the next.

As most service products cannot be inventoried or stocked, customers may need to wait for the service (for example, getting a haircut). Customers can also experience different quality or standards of the same service (for instance, having a different hair stylist at the same salon).

Services are more difficult to standardise, therefore developing a service operations system is very important for providing value. As it is more complex, services marketing adds another layer to the marketing mix, outlined in three more elements:

<b>People</b>	Customer service staff or other employees who deal directly with customers, such as sales reps. They contribute to the overall customer experience.
<b>Physical evidence</b>	Any components that communicate the brand, such as signage, business cards, equipment, uniforms and venue design, as well as the whole service landscape.
<b>Process</b>	Steps that the customer goes through to acquire the service – the so-called ‘customer journey’ – and all touchpoints of experience. For example, a hotel stay starts with the internet booking or agent contact, and continues with the front desk interaction, check in and payment, transfer of luggage and getting to the room etc.

## Brand and positioning

Most organisations aim to establish a strong relationship with their customers through their brand. Brand refers to more than just a name and a logo, it represents everything that a product or service means to customers and is integral to the marketing concept. Brands vary in the amount of value and power they hold in the marketplace.

International brand consultancy Interbrand ranks the top 100 global brands every year. In 2020, Apple remained the world’s most valuable brand with an estimated value of almost US\$232 billion. A brand with a high brand value (brand equity) is a valuable asset to a company. This is achieved by carefully designed and coordinated marketing activities.

One of the key brand strategies involves brand positioning. There are different approaches to positioning a brand, for example, Lexus cars are positioned by emphasising a desirable benefit, such as quality, whereas Apple relies less on tangible attributes and more on emotional aspects, such as excitement and customer identity, such as a having passion for innovation.

Organisations must manage their brands carefully. Communication of the brand to customers must be consistent, therefore, and each marketing activity has to be carefully prepared and coordinated with this in mind.

## Product knowledge

Organisations that adopt the marketing concept aim at delivering customer value. For this, they need a team that has the product knowledge to support and satisfy customers. The key aspects of product knowledge are product features and benefits.

Product features	Product benefits
<ul style="list-style-type: none"> <li>▪ design and specifications</li> <li>▪ quality</li> <li>▪ options (colour, size)</li> <li>▪ packaging</li> <li>▪ service levels</li> </ul>	<ul style="list-style-type: none"> <li>▪ safety</li> <li>▪ performance</li> <li>▪ environmental responsibility</li> <li>▪ value for the price</li> <li>▪ peace of mind</li> </ul>

Sales representatives have product knowledge when they fully understand and can effectively communicate with customers about the product or service – its features, benefits, uses and support needs.

The table below shows examples of product knowledge of the latest Apple iPhone.

### Product feature

Product features and attributes set products apart in the market.

For example, new features of the iPhone 12 include water resistance up to 6 meters for 30 minutes and a new ceramic shield..

### Product use

Product use is a measurement of how a product is used and its performance efficiency.

For example, the iPhone 12 smart HDR 3 uses ML to adjust white balance, contrast, texture and saturation in every photo.

### Product benefits

Product benefits refer to the perceived or actual value that customers get from the product.

For example, the iPhone 12 ceramic shield provides increased durability, and the new camera takes more impressive images.

### Product support needs

Product support includes everything that can help maximise after-sales satisfaction, such as parts, services, warranty and customer experience support.

AppleCare products provide additional hardware service options and expert technical support, and user resources.

Adapted from Apple Insider (2021), Quiller Media, [appleinsider.com/inside/iphone-12](https://appleinsider.com/inside/iphone-12), viewed 20 Feb 2021

To improve your product knowledge, you can use three simple techniques:

- talk to your co-workers or make an effort to visit your customer care team to learn more about specific customer needs
- read marketing materials such as product brochures, customer service procedures, marketing plans and the company website.
- talk to your customers directly to better understand their perceived service value and expectations so you can find out the features that matter to them.

## Policies and procedures

Organisational policies and procedures need to be considered in relation to marketing activities. Codes of ethics ensure adherence to organisational values and ethical conduct of employees, including the ethical use of data.

Organisational requirements relevant to marketing activities may include:

<b>Licensing or franchise policy</b>	<ul style="list-style-type: none"> <li>• A framework for licensing organisational IP, for example, product brand name and character licencing.</li> <li>• The franchise policy may include a requirement for retailers not to discount branded products in order to maintain high perceived brand value, for example, luxury accessories.</li> </ul>
<b>Code of ethics</b>	<ul style="list-style-type: none"> <li>• A set of rules, behavioural norms and practices that are unique to the organisation. The code defines how employees should act on a daily basis and reflects the core values and culture of the organisation. It may include industry standards and relate to ethical business practices.</li> </ul>
<b>Marketing policies and procedures</b>	<ul style="list-style-type: none"> <li>• Some organisations develop marketing policies and procedures with the purpose of managing their print and online publications, including marketing, advertising, branding and recruitment activities.</li> <li>• For example, Melbourne Institute of Technology uses a policy for conducting marketing and promotional activities, to ensure they comply with the MIT brand. Marketing procedures define the use of corporate identity and contain approval processes for developing content and assessing sponsorships.</li> </ul>

<b>Brand management policy</b>	<ul style="list-style-type: none"> <li>Organisational rules of visual and written communication, including brand guides. Brand guides cover verbal and visual brand communication, including the composition and design of visual communication – for example, specific colours, fonts, layouts, imagery and iconography.</li> </ul>
<b>Reporting procedures</b>	<ul style="list-style-type: none"> <li>Reporting procedures may outline the timelines of reporting incidents, sales underperformance and media coverage of the organisation. They may include the requirements for specific formats and templates used in marketing reports or rules for distributing reports.</li> </ul>
<b>Purchasing policy and procedure</b>	<ul style="list-style-type: none"> <li>A policy and procedure supporting the central purchasing function in large organisations. It may include procurement, raising purchasing orders, and the process for payment and payment terms. This policy and procedure may be relevant to purchasing materials or hiring equipment for marketing campaigns.</li> </ul>
<b>Sales procedure</b>	<ul style="list-style-type: none"> <li>Outlining the requirements for a seven-step sales process: prospecting, preparation, approach, presentation, handling objections, closing and follow up.</li> </ul>
<b>HR policy</b>	<ul style="list-style-type: none"> <li>Policies for recruiting and remuneration of temporary staff employed for the duration of a marketing campaign. For example, the terms of payment and conditions of work.</li> </ul>

An example of a purchasing policy and procedure is available here: [aspirelr.link/vu-purchasing-policy-procedure](https://aspirelr.link/vu-purchasing-policy-procedure)

## Legislative requirements

Organisations must comply with legal obligations in planning and undertaking marketing activities, for example, anti-discrimination, work health and safety (WHS), employee privacy and confidentiality.

*Work Health and Safety Act 2011 (Cth) and state WHS acts*

Work Health and Safety acts provide a framework to protect the health, safety and welfare of all workers at work. It also protects the health and safety of all other people who might be affected by the work. WHS influences many aspects of marketing activities such as public events or trade fairs, for example, a safe use of electric equipment including wiring and extension leads, ensuring evacuation procedures from the venue, not exceeding capacity of attendees, etc.

### Privacy Act 1988 (Cth)

All personal information must not be made public or used for marketing purposes without the consent of the individual. Distribution of information or promotional materials should protect privacy (for example, contact details or images). Further information can be found here: [aspirelr.link/oaic-privacy-act](https://aspirelr.link/oaic-privacy-act)

### Anti-discrimination acts

Anti-discrimination Acts such as *the Commonwealth Age Discrimination Act 2004*, *Racial Discrimination Act 1975*, *Disability Discrimination Act 1992* and *the Sex Discrimination Act 1984* ensure that all written, verbal and nonverbal interactions are free from derogatory, abusive and harmful words relating to age, race, gender, abilities or sexual orientation.

This legislation impacts written and oral language used in marketing communications, selection of images, portrayal of social or racial groups in advertising and examples, etc.

### Copyright Act 1968

Copyright refers to the legal right of the owner of intellectual property. It applies to reproduction and work such as visuals, sound and text, and requires seeking authorisation to reproduce such work. Images and citations need to be correctly attributed to the authors.

### Competition and Consumer Act 2010 (Cth)

Formerly the Trade Practices Act, the law deals with competition, fair trading and consumer protection. It states that organisations must not mislead or deceive clients, hinder legitimate competition, make false claims or use bait pricing.

## Marketing plans

**The marketing plan is an operational document for introducing and delivering the organisation's product or service to the target market.**

A marketing plan helps organisations to focus on their priorities when planning marketing activities. It should define the marketing objectives of the company, outline strategies and tactics to achieve them, and identify resources and timelines.

Below is a summary of a marketing plan structure and the sources of information used for its development:

Section	Key terms and descriptions	Sources of research information for developing a marketing plan
Executive summary	Summary of main goals, recommendations and points for executive reading. A table of contents follows this section	N/A
Current marketing situation	Discussion of the overall market situation, including the macro environment and industry trends and the organisation's current situation	External sources such as Australian Bureau of Statistics (ABS), industry associations and industry reports, and internal company performance data, such as sales reports, supply chain reports
Target market description	Analysis of the market segments and decisions on the target market, discussion of segmentation strategies	Internal customer relationship management database, internal sales data to analyse purchasing rate and frequency, primary research such as customer surveys, focus groups
Product review	Summary of the main features for all the organisation's products or product lines	Internal documents on marketing activities and observation research on customer behaviour
Competitive review	Identification of direct and indirect competitors and description of their market positions and brand strategies	Statistical data from ABS, industry report on competitors' activities, commercial intelligence collected by the company, qualitative insights from customer feedback and surveys
Channels and logistics	Overview of each channel and distribution arrangements	Internal information such as supply chain data and information on previous market performance
SWOT analysis	Analysis of internal strengths and weaknesses and external threats and opportunities	Interpretation of market research and internal analysis
Objectives and issues	Broad corporate goals and specific measurable objectives for at least two years of operation	N/A
Marketing strategy	Analysis of the marketing mix components (product, pricing, distribution, communication) and brand positioning	N/A
Marketing research	Measuring and analysing customers' attitudes, brand awareness research to determine effectiveness of media	Feedback from suppliers and customers and primary research tools such as surveys

Section	Key terms and descriptions	Sources of research information for developing a marketing plan
<b>Action programs</b>	Action plans or operational plans to be used for the next 6 months to achieve stated objectives and ensure tracking	Collecting information from the organisational departments and teams to ensure implementation
<b>Budgets</b>	Projected revenues, break-even calculations, profitability analysis, and estimates of variable and fixed costs	Internal data from finance and sales departments
<b>Controls</b>	Control measures to monitor quality and customer satisfaction, as well as to identify early warning signs and risk management actions	Collecting sales and customer service data, conducting customer satisfaction surveys

Adapted from Armstrong, Kotler, & Opresnic (2019), "Marketing: An Introduction", 14th global ed., Pearson.

While preparing to undertake marketing activities, organisational marketing plans can provide you with a wealth of information on the context in which the company operates. Examining the current marketing plan will help you to identify the actions planned and resources available to achieve marketing objectives.

## Developing a marketing plan

The purpose of developing a marketing plan is to ensure that marketing activities in the organisation are relevant and timely, and promote an organisation's objectives. The process for marketing planning varies and depends on the company size, operational scope and financial capabilities.

The Australian Government provides support to businesses and recommends a step-by-step process in developing a marketing plan:

### Step 1: Look at the industry structure

Find out about your industry, industry associations, statistics and benchmarks to help you understand how your business's performance compares to others in the industry

**Step 2: Conduct market research**

Gather and organise information about your target market and consumer needs, and understand where your business fits within the market.

Undertake primary (first-hand) or secondary (publicly available) data research to understand your target customers, their problems and needs.

**Step 3. Define your market and customer profile**

Divide the market into segments using characteristics such as gender, location, income, preferred media channels or other descriptive variables. Evaluate each segment and determine their needs. Identify your preferred market segment so that you do not waste resources on market segments that won't buy your products or service.

**Step 4: Conduct a SWOT analysis**

Identify your business's internal strengths and weaknesses and external opportunities and threats (SWOT) that can impact on your business. A SWOT analysis can help you to discover how your business can improve and identify practices or other market players.

**Step 5: Study the competition**

By analysing your competition you can find out how your organisation compares and what potential threat they present to your business. You can identify direct competitors (who offer the same product or services as you) or indirect competitors (who sell different products but may satisfy the same consumer need).

The more you know about your competitors the better you'll be at identifying the potential opportunities available for your business.

**Step 6: Set goals and objectives**

Think long-term and figure out your main business goals, then specify immediate objectives that your business wants to achieve. For example, increasing sales by 50% during a specific period of time.

**Step 7. Outline marketing strategies and activities**

Once the objectives are set, identify marketing activities that suit your business and customers. Marketing strategies are defined using the marketing mix, specific pricing, promotional and distribution strategies for your specific product serving your target market.

**Step 8: Set a marketing budget**

When developing your marketing budget, make sure you accurately calculate your spending money on the requirements of your current marketing objectives. Select the options that will be most effective in reaching your target market.

**Step 9. Update your marketing plan**

Many factors can impact on your marketing results. It is important to keep monitoring marketing trends and marketing outcomes and evaluate how the organisation is reaching its marketing objectives. Marketing plans are living documents that may need change as your business and market change.

Adapted from the Australian Government Business (2020), viewed 20 Feb 2021, available [business.gov.au/planning/business-plans/how-to-write-your-marketing-plan](https://business.gov.au/planning/business-plans/how-to-write-your-marketing-plan)

## Identifying task requirements according to marketing plans

Marketing tasks must be consistent with the overall marketing plan of the organisation, which should align with the organisation's marketing concept.

A **task** is a function or an assigned piece of work to be finished within a certain time.

**Task requirements** are quality criteria and refer to physical, functional or administrative needs that should be covered by the assigned resources.

To be effective in identifying marketing task requirements, you will need a sound understanding of the following aspects of your organisation:

### 1. Knowledge of the target market

- Who is your ideal customer?
- What is your customer profile (persona)?
- How do you know their needs and wants?

### 2. Specific product knowledge

- What type of product are you selling (consumer or industrial)?
- What need is your product or service satisfying?
- What problem is your product or service solving?
- What are the product features, benefits and uses?
- What does the brand stand for? What is the brand's promise to customers?
- How is your brand positioned in the market?

### 3. The marketing mix

- How is the ideal customer (your target market) served and customer value created using a combination of marketing components:
  - The 4P for a **physical product**: product, price, place and promotion
  - The 7Ps for a **service**: product, price, place, promotion, people, process, physical evidence

The marketing plan provides a framework for identifying marketing tasks for implementation, in the context of the organisation's marketing environment.

To identify the tasks, analyse the following sections of the marketing plan in more detail:

<b>Objectives</b>	<ul style="list-style-type: none"> <li>• What are the corporate or organisational goals that the company wants to achieve?</li> <li>• What are specific measurable objectives for the next year or 6 months?</li> </ul>
<b>Marketing strategy</b>	<ul style="list-style-type: none"> <li>• What marketing mix strategies are planned?</li> <li>• Are there any product or service delivery changes planned?</li> <li>• Are there any changes in pricing or distribution strategy?</li> <li>• What are the marketing communication or brand communication objectives? What are the communication messages and media channels?</li> </ul>

<b>Action programs</b>	<ul style="list-style-type: none"> <li>• What is the operational plan for the next 6 months?</li> <li>• What results are expected from the implementation of the marketing plan?</li> <li>• Who or which departments are managing the operations?</li> <li>• What is the timeline for implementation?</li> <li>• Who are the responsible staff or department?</li> </ul>
<b>Budgets</b>	<ul style="list-style-type: none"> <li>• What resources (budget and staff) are available?</li> <li>• Can you hire temporary staff for marketing support?</li> </ul>
<b>Controls</b>	<ul style="list-style-type: none"> <li>• How will customer satisfaction will be managed?</li> <li>• How is risk managed?</li> </ul>

Reviewing and finding answers to these questions will help you to identify specific tasks that need to be completed.

Some examples of how marketing task requirements may apply to marketing activities are listed below:

<b>Marketing objective</b>	<b>Marketing mix strategy</b>	<b>Marketing activities and task requirements</b>
To increase product sales by 20% in the next financial year	To review product distribution channels for efficiency	Distribution strategy adjustment may require contacting retailers and reviewing sales data per each retailer. The tasks need to be undertaken in compliance with: <ul style="list-style-type: none"> <li>• organisational reporting procedure</li> <li>• brand management policy and code of ethics</li> <li>• the Competition and Consumer Act .</li> </ul>
To increase brand awareness by 20% among industrial customers during the marketing campaign	To build industry relationships and network and promote the brand	Promotional strategy implementation may include preparation for a local or international trade fair. This marketing activity will include tasks that will require: <ul style="list-style-type: none"> <li>• consideration of budgets and resources assigned in the marketing plan</li> <li>• approvals for hire of casual support staff according to the HR policies</li> <li>• compliance with the Privacy Act and anti-discrimination legislation.</li> </ul>

After reviewing the marketing activities outlined in the marketing plan you will be able to:

- understand the marketing mix strategy
- understand how customer needs will be met by using the elements in the marketing mix
- make a note of the budget allocated to each activity
- discuss your expected outcomes from the marketing activities
- outline the projected sales or customer satisfaction outcomes
- follow reporting procedures and evaluate success.

## Example

### Identifying task requirements

Rita is a marketing assistant in the transport company TransCoast. They provide heavy haulage transport services and offer containers and trailers of various sizes and shapes to meet their clients' transportation needs.

Although the company has a long history and an established brand name, its current marketing plan has set key marketing promotional objectives for the next 12 months. One of their objectives is to maintain and grow corporate brand awareness among the transport association network.

TransCoast has assigned a marketing budget of \$20,000 for promotional activities. The marketing department has planned a three month promotional campaign, which includes advertising and PR.

Rita identifies that her key tasks when coordinating marketing activities will be communicating with media companies, monitoring the advertising schedule and ensuring that the content published meets organisational policies and legislative requirements.

## Practice Task 1

### Question 1

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Which of the following terms directly relate to the five marketing concepts? Tick all that apply.

- Production marketing
- The 'hard sell' technique
- Policies and legislative requirements
- Societal marketing
- Product knowledge

### Question 2

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Which of the following statements about task requirements for marketing activities are correct? Select yes or no for each one.

- a) Brand management policy is relevant to identifying task requirements      >> Yes      >> No
- b) Competition and Consumer Act 2010 (Cth) is a legislative requirement for marketing tasks in all organisations      >> Yes      >> No
- c) Marketing tasks must be consistent with the marketing plan      >> Yes      >> No
- d) The Trade Practices Act is a requirement for marketing activities      >> Yes      >> No

### Question 3

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List four internal or external sources of information to consult when researching marketing practices.

## Question 4

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Draw a line to match each of the following terms to their correct definition (one relates to two definitions).

- |                       |  |
|-----------------------|--|
| » Marketing procedure | » A set of rules, behavioural norms and practices unique to the organisation that reflect core values and culture              |
| » Brand style policy  | » A process for managing marketing publications and social media   |
| » Code of Ethics      | » Timelines for reporting and format requirements for marketing reports  |
| » Reporting procedure | » A process for managing promotional activities and the approval process for developing content                                |
| » Marketing procedure | » Requirements for verbal and visual communication, such as specific colours, fonts, layouts, and fonts in marketing materials |

## Question 5

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Which of the following statements about products and services are correct? Select yes or no for each one.

- |  |       |      |
|--|-------|------|
| a) Specialty products refer to low cost items that you can purchase at the supermarket | » Yes | » No |
| b) The term 'product performance' refers to a product's efficiency                     | » Yes | » No |
| c) Services are part of the product marketing mix                                      | » Yes | » No |
| d) Product benefits are attributes and features of the product                         | » Yes | » No |

## Question 6

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List four examples of marketing practices in organisations.

## Question 7

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Which of the following statements relate to task requirements for marketing activity? Tick all that apply.

- Budget
- Organisational policies
- Marketing mix strategies
- SWOT analysis
- Priorities

# 1B Review marketing activities

When preparing to undertake marketing tasks, you will need to review marketing activities in the broader marketing context.

When reviewing past marketing activities, you will need to familiarise yourself with the external market environment. This includes macroenvironmental and industry trends as well as the competitive landscape.

The marketing plan details marketing activities to be implemented during a set period of time – usually a year. It is helpful to evaluate the success of previous marketing activities set out in the last marketing plan, so you are able to see what was and was not effective.

Although sales and profits are the most commonly used measures of marketing effectiveness, there are a range of other indicators as well, such as:

<b>Lead generation and conversion rate</b>	<p>Lead generation refers to the initiation of customer interest or enquiries during a marketing activity for sales leads.</p> <p>Reviewing past email campaign activities may help to identify how many new customers were attracted or how many new customers were gained through referrals.</p>
<b>Customer loyalty</b>	<p>Customer loyalty is about choosing one organisation's products and services consistently over the competitors' offerings. Customer loyalty results in customer retention, which is more profitable than going to the effort of gaining new customers.</p>
<b>Website traffic</b>	<p>Website analytics measure increases or decreases in website traffic and may answers questions such as:</p> <ul style="list-style-type: none"> <li>▪ Which days of the week or times of the day generate the most traffic?</li> <li>▪ How many repeat visitors is the website getting?</li> <li>▪ Which mobile devices are visitors using?</li> <li>▪ Which are the most and least popular pages of the website?</li> <li>▪ What is the average time spent per page or per visit session?</li> </ul>
<b>Social media analytics</b>	<p>Social media platforms provide some analytics concerning publicity, for example:</p> <ul style="list-style-type: none"> <li>▪ What were the most popular posts?</li> <li>▪ How many new followers did a certain activity attract?</li> <li>▪ How many shares did the activity generate?</li> </ul>
<b>Promoter score</b>	<p>The net promoter score (NPS) is used to measure the willingness of customers to recommend a company's products or services to others. It also measures customer overall satisfaction with a company's product or service and customer loyalty to the brand.</p>

Remember that all marketing activities need to be aligned and reviewed against the marketing objectives that were set in the marketing plan. Measuring past performance of individual initiatives or tasks on their own may distract you from the broader organisational objectives that they were created to fulfil.

## The external marketing environment

Marketing activities may need adjustment or re-evaluation due to the changing marketing environment.

The external marketing environment includes macroenvironmental forces. Macroenvironmental factors affect all organisations in the industry and impact the ability of all competitors to market products and services effectively.

All organisations must monitor their external environment and consider what might affect the business and marketing strategies. A common framework to scan the macroenvironmental forces impacting on organisations is a PESTLE analysis, which examines political, economic, social, technological and environmental trends.

- The political environment refers to laws, government agencies and regulations.
- Economic trends involve changes in unemployment, GDP, and currency fluctuations that impact export businesses.
- Social and demographic trends reveal population growth and structure, and changing social and cultural norms.
- Technological trends show new technology and innovations that change the marketing landscape.
- Environmental trends include regulations on the use of energy sources and recycling, as well as increasingly unstable climate conditions and extreme weather events.

The success of the PESTLE analysis depends on the quality of the research data. Reliable information sources include:

- statistical information from the Australian Bureau of Statistics on population and buying trends
- government reports on the economy, changes in interest rates, projected GDP growth or employment rates
- industry association publications and websites, industry group reports, and databases (such as IBISWorld)
- reputable publications such as Euromonitor and Statista.

More and more companies are going beyond what government regulations dictate and developing marketing practices that support environmental sustainability and thriving communities. Socially responsible behaviour of organisations falls under the societal marketing concept. Such organisations are responding to customer demands with more socially responsible production and management practices.

## Industry trends

An industry is a group of companies competing in the market, for example, the agricultural industry, telecommunications industry, healthcare industry, etc. Industries can be classified into further industry categories or sectors. For example, the agricultural industry can be segmented into dairy, cereals, citrus growing and others.

Assessing industry trends allows organisations to identify growth opportunities and develop business and marketing strategies based on this information.

IBISWorld, an industry and market research database, provides information and analysis on more than 700 industries worldwide. According to IBISWorld, the fastest growing industries in Australia by revenue growth in 2021–2022 are:

The fastest growing industries in Australia by revenue growth (2021–2022)
<ul style="list-style-type: none"> <li>▪ rice growing (186%)</li> <li>▪ cotton growing (121%)</li> <li>▪ grain growing (46%)</li> <li>▪ nickel ore mining (40%)</li> <li>▪ fishing (24%)</li> <li>▪ scenic and sightseeing transport (22%)</li> <li>▪ babysitting and other personal services (15%)</li> </ul>

Source: IbisWorld (2021), [ibisworld.com/australia/industry-trends/fastest-growing-industries/](https://ibisworld.com/australia/industry-trends/fastest-growing-industries/) viewed 20 February 2021.

Industry trends can be assessed by evaluating the following factors:

- drivers of industry performance
- demand for services
- revenues and revenue projections
- the industry profitability level
- number of competitors in the industry
- required conditions for the industry to function.

Below are some examples of supermarket and groceries industry trends:

#### Industry performance

Drivers of industry performance include household disposable income. For example, for the supermarket industry a lower disposable income may mean more demand on home-brand products. Weak population growth may result in weaker sales across the whole sector.

#### Industry outlook

This includes historical performance and the industry projections short term and longer term. For example, supermarket and grocery industry revenue is projected to increase annually by 2.0% during 2021–2026, to \$134.1 billion. Profitability in the industry is projected to increase over the next five years, despite weak household incomes and high unemployment in the short term.

#### Demand determinants

This relates to how much demand, and customer motivation for shopping, is going to change in the short term. For example, in the supermarket industry sector, convenience is vital to store selection and is the key to maximising the amount spent. Time conscious consumers are less price sensitive.

#### Operating conditions

Operating conditions include how labour- or capital-intensive the industry is, and how automated it is. For example, Coles and Woolworths have invested in automated warehouses and Woolworths is estimates to require as many as 1,000 fewer employees across Victoria. Operating conditions include how concentrated an industry is, and how difficult it is for new businesses to enter the industry.

Fluctuations in industry conditions may require some adjustments to marketing strategies, for example, product pricing or distribution. This, in turn, may require changes in planned marketing activities.

## Competitive activity

Organisations need to respond to the actions of competitors and be prepared to outperform them. This requires understanding the following key areas:

<b>Direct and indirect competition</b>	<ul style="list-style-type: none"> <li>Direct competitors are other businesses that offer the same product or service. For example, Woolworths and Coles are direct competitors.</li> <li>Indirect competitors are businesses whose products and services are different but could satisfy the same customer need, for example, take-away food outlets and grocery markets.</li> </ul>
<b>Market share and level of competition</b>	<ul style="list-style-type: none"> <li>Market share is the percent of total sales in an industry generated by a particular company. For example, Woolworths holds 37% of the market and Coles 28% in the supermarket segment. The larger the market share other companies hold, the less opportunity there is for new entrants.</li> </ul>
<b>Basis for competition</b>	<ul style="list-style-type: none"> <li>Companies compete on different factors, for example in Australia, large supermarkets primarily compete on price because consumers are price sensitive.</li> </ul>
<b>Product offerings</b>	<ul style="list-style-type: none"> <li>The type of product or service offered by competitors, and their features and benefits. These factors will influence how your organisation's products and services are marketed.</li> </ul>
<b>Industry life cycle</b>	<ul style="list-style-type: none"> <li>Industries, like products, go through life cycles and stages of introduction, growth, maturity and decline. Businesses capture opportunities when the industry is in the growth stage. Competing in a declining industry requires companies to come up with new marketing strategies.</li> </ul>
<b>Competitors' marketing strategies</b>	<ul style="list-style-type: none"> <li>The marketing mix strategies of competitors and the impact of their competitive activity on your organisation. This may involve using the same communication media to compete for the customers' 'share of mind', being aware of the changing pricing and distribution strategies.</li> </ul>

## Example

### Competitors

The Australian Football League (AFL) is the most popular sporting league in Australia in terms of attendances, television ratings and revenue. Who are the AFL's competitors? At first glance it could be assumed that the AFL doesn't have any competitors – after all, it is the only elite Australian Rules competition in the world.

In fact, the AFL is in direct competition with the other major football codes in Australia such as the National Rugby League (NRL), Super 14 and increasingly, A-League Soccer. However, the AFL is also in indirect competition with all other sporting codes, not only for fan attendance but also for corporate support and sponsorship. The spending budgets of fans and sponsors are limited, and these groups have a large range of choices on how they spend their money.

In addition, the AFL also faces indirect competition from other organisations offering entertainment in one form or another. Every weekend, people make a decision about how to spend their entertainment budget and the AFL must compete with cinemas, museums, concerts and many other forms of entertainment.

## Assess planned marketing activities

The purpose of evaluating industry trends and competitive activity is to assess whether any adjustments are required in the planned marketing activities outlined in the marketing plan.

For example, in a growing industry the company may decide to take on new business opportunities and increase distribution intensity. However, if macroeconomic trends indicate a slowing of economic growth and decreasing purchasing power of consumers, marketers may decide to provide more value by bundle pricing or packaging capacity.

Reviewing past marketing activities indicates which strategies have been effective in the past and therefore whether these strategies might be improved. Companies may select any aspect of their marketing practice for review, and compare previous marketing performance with the planned activities in relation to the broader industry and competitive environment.

Remember that the marketing objectives might have changed, and the review should consider whether or not previously effective activities are still relevant in the context of the changing industry and competitive landscape.

An example of a review of marketing activities is provided below:

Organisational marketing practice	Previous marketing activities	Planned marketing activities
Provision of services (production)	Customer feedback indicated not enough post-purchase customer care compared to direct competitors.	More customer service staff may need to be hired to meet customers' expectations.
Selling	High quality lead generation resulting from artificial intelligence (AI) and apps.	With the automation trend in many industries, more emphasis will be required on mobile-friendly devices and generating website traffic.
Product benefits and branding	Customers were historically more interested in the product specifications and features.	Industry trends indicate customers are becoming environmentally aware and the demand on recycling is increasing. The company needs to provide device upcycling or trade-in services as part of the promotional strategy.

## Example

### Reviewing marketing activities

Aaron is a new marketing coordinator in a large catering company, Fresh Bite Catering. The company provides services to corporations located in metropolitan areas employing at least 50 staff.

Aaron is given the task of preparing for the implementation of the marketing plan. He reviews past marketing practices to check if any adjustments are required to the marketing plan. His industry research suggests that companies have adapted new ways of working in the post-COVID economy.

The industry trend analysis indicates new customer needs around food hygiene, such as individual packaging of meals, while at the same time, customers' increased environmental awareness calls for the replacement of plastic containers and cutlery with compostable alternatives. He notices that direct competitors of Fresh Bite advertise high hygiene standards. Customer feedback shows that strict hygiene controls are now a minimum expectation for any catering service.

As a result of his analysis, Aaron identifies the need to emphasise the company's social corporate responsibility in the promotional materials and communication channels. This will help to create a competitive advantage for Fresh Bite. The advertising message of some of the marketing materials will need to be changed, and they will also need to find suppliers of environmentally friendly packaging.

## Practice Task 2

### Question 1

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List four macroenvironmental forces that affect organisations.

### Question 2

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Which of the following statements about industries are correct? Select yes or no for each one.

- |  |       |      |
|--|-------|------|
| a) An industry is a group of companies competing in the market and aiming to satisfy similar customer needs. | » Yes | » No |
| b) Assessment of industry trends allows companies to identify growth opportunities.                          | » Yes | » No |
| c) Macroenvironmental forces do not impact on industry trends.   | » Yes | » No |
| d) Organisations should not change their planned marketing activities according to industry fluctuations.    | » Yes | » No |
| e) Industry performance is measured by revenues and profitability.   | » Yes | » No |

### Question 3

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Give three examples of how competitive activities can be assessed.

### Question 4

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Number each step from 1 to 6 in the order you would follow to review marketing activities.

- Gather information about the results of the previous marketing activities
- Check how the industry and competitors' strategies have changed
- Select an aspect of marketing practice for review
- Locate marketing objectives for the past marketing activities
- Identify marketing activity for review
- Compare previous performance according to the marketing objective for the activity

# 1C Develop, document and seek approval for action plan

After the organisational requirements for the tasks have been identified, the next step is to develop and document an action plan.

An action plan is a checklist of the tasks involved to achieve the marketing objectives set out in the marketing plan. The action plan should take into consideration your key findings from the trend analysis and competitive review, and cover these points:

- implementation tasks for each marketing objective and activity
- outcomes and expectations
- people responsible (human resources required)
- implementation timeline (deadlines and milestones)
- financial resources
- measures to evaluate progress.

## Document marketing activities in the action plan according to task requirements

In your action plan, specify and document all marketing activities for the implementation of the marketing plan.

The best way of documenting your action plan is to break down each marketing activity into smaller tasks or sub-tasks. Then specify the resources needed, such as people, budget and time for completion. The details should be comprehensive enough to allow others to understand the scope of the activity and the actions.

Best practice action planning includes these steps:

### 1. Define your end goal

Locate your organisation's marketing plan and find the marketing objectives. Well-written marketing objectives should be SMART (specific, measurable, achievable, relevant and time-framed).

### 2. List the steps for each marketing activity

Create a list of all the tasks to be performed, their due dates and the people responsible for implementing them. Make sure that each task is clearly defined. Break down larger tasks/marketing activities into smaller tasks and sub-tasks.

### 3. Prioritise tasks and specify deadlines

Reorganise the list by prioritising tasks. Add deadlines and make sure they are realistic. You may need to consult with senior managers to understand the capacity of other employees before deciding on the deadlines.

### 4. Set milestones

Milestones are mini goals that lead to your key marketing objective. Space out your milestones so that the team stays motivated during the marketing project.

### 5. Identify the necessary resources

List the resources required to complete the tasks. If they are currently not available, make a plan to acquire them. Include your budget and mark the cost of each task.

### 6. Create a visual template

Use a table format or a flowchart such as a Gantt chart to communicate all the elements of the action plan, tasks, deadlines and resources. Make your template clear and accessible to all of the team.

### 7. Monitor and update

Mark completed tasks as 'done' and those that are still pending or delayed as 'incomplete'. A clear template will help you to identify gaps and look for solutions. Update your action plan regularly. Use co-author software for document collaboration and to make the plan accessible for all team members.

There are a range of formats of business marketing action plans that organisations can use. The key sections of an action plan are outlined below:

<b>Marketing objective</b>	Identify the marketing objective which the activity is aligned to. For example, a marketing objective 'to increase brand awareness by 50%' may involve promotional activity such as advertising or email marketing.
<b>Marketing activities and tasks</b>	Each marketing activity, depending on the scope, may be broken into smaller tasks. For example, a website sales promotion may require implementation of more than one task: SEO (search engine optimisation), content development, data analytics and reporting.

<b>Financial resources</b>	Review the marketing budget breakdown and estimate the costs for each marketing activity. Cost estimates are usually based on labour hours, materials and equipment.
<b>People (human resources)</b>	People in the organisation or casual workforce (such as consultants) need to be identified in the action plan and responsibilities assigned to each task.
<b>Other material resources (or in-kind resources)</b>	Other material or in-kind resources such as the use of printers, meeting rooms or vehicles, display stands and other items need to be listed.
<b>Time</b>	Time is also a resource and needs to be carefully planned. Devising a timeline is a common practice in action planning, along with indicating the key milestones against which the progress will be measured.
<b>Measure of success</b>	Indicators of how the success can be measured. For example, when launching a company's website, a targeted number of hits per month might be specified (e.g., 2000 per calendar month).

Free examples of action plans and software of editable templates are available online:

- [aspirelr.link/marketing-action-plan](https://aspirelr.link/marketing-action-plan)
- [aspirelr.link/creatly](https://aspirelr.link/creatly)

Remember to follow organisational policies and procedures when developing an action plan to meet the task requirements, for example:

- consult with your manager or team before allocating tasks and responsibilities
- follow your human resources procedure when advertising and hiring casual staff for marketing campaigns
- follow the budgeting procedure when estimating costs and allocating budgets.

Below is an example of a marketing action plan structure for a gym franchise that can be adapted to organisational needs:

<b>Marketing objective:</b>					
<b>To increase membership subscriptions by 20% in the next 6 months</b>					
<b>Activity</b>	<b>Tasks</b>	<b>Responsible</b>	<b>Timeframe</b>	<b>Resources</b>	<b>Budget</b>
Membership promotion	design flyers print flyers display in gyms	marketing assistant Dimitris	1–15 March	laptop printers	\$500
	EDM (electronic direct mail) follow up	sales assistant Claire	1–15 April	laptop email list	\$300

## Seek approval for action plans from relevant personnel

The last step in preparing for the implementation of the action plan is to obtain approval from the relevant people in the organisation.

Depending on your type of organisation, its structure and your role in it, approval may be required from a several people or departments. For example, budget expenses may need to be approved by the senior manager and the finance department.

Approval is always required at the beginning of the marketing activity but may also be required during the marketing campaign. One reason could be that adjustments are necessary due to changing industry conditions. You may need to prepare a short report to justify the changes or request for additional funding.

Approvals are required to ensure that:

- resources are available for the marketing activity and related tasks
- there is a commitment to the implementation of the marketing initiative
- the marketing action plans align with the organisation's marketing plan
- there is clarity in the task requirements and implementation approach.

Larger organisations often have several levels of authority for expenses or when budgets exceed a certain amount. Personnel who may be involved in approving a marketing action plan may include:

- business owners
- managers or team leaders
- marketing coordinators.

Double check financial allocations with your manager or team leader to confirm there are no hidden costs (for example, posting or printing).

Remember to follow relevant organisational policies and procedures such as:

- purchasing policy and procedure – if there is a need to obtain quotes or raise purchasing orders
- human resources policies, – if there is a need to hire casual staff during a campaign
- reporting policy – if there is a specific format required or approvals need to be distributed internally.

## Example

### Documenting action plan for marketing activities

Astha is a marketing officer in a medium size food manufacturing company, Soul Food. It's her responsibility to manage sales and promotional activities in the company. The company employs only a small sales team who are all permanent employees. For marketing campaigns, however, Astha needs to contract an agency or hire casual staff to undertake marketing tasks, such as conducting product tastings in supermarkets.

The sales team, however, is very enthusiastic and sometimes come up with their own initiatives and ideas. Last year the leader of the sales team, Dean, hired a start-up company to run a new product launch. Although the ideas of the contracted company were innovative, Dean forgot to include the cost of equipment hire into the budget, which caused a lot of issues for Astha in managing the yearly marketing budget.

This year, Astha has developed a detailed action plan to align each marketing activity with tasks, budgets, responsibilities and timelines. She called a meeting and explained the plan to the sales team, including how the purchasing policy and procedure applied to it, in order to avoid costly misunderstandings.

## Practice Task 3

### Question 1

Which of the following statements relate to marketing action plan structure? Tick all that apply.

- People responsible
- Financial resources
- Deadlines
- Operating conditions
- In-kind resources

## Question 2

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List two examples of policies or procedures relevant to the development of marketing action plans.

## Case study

Hannah is a marketing assistant in a large retail company that sells kitchen appliances. The marketing manager, Claire, asked Hannah to review the marketing activities from the previous year and to develop an action plan for marketing activities, according to the newly approved marketing plan. The marketing plan set specific objectives for the following financial year, focusing on improving customer experience and promoting a new product line. Marketing activities are planned for each marketing objective. These include running a Mother's Day in-store sales promotion campaign. Hannah needs to work on the action plan for the sales promotion.

## Question 1

---

List the steps Hannah could follow to develop an action plan for the marketing activities.

## Summary

- The marketing concept implies that an organisation's effort is focused on satisfying customer needs and achieving their corporate goals simultaneously. Historically, the marketing concept developed through these five stages: product, production, selling, marketing and societal marketing.
- The marketing concept is based on the principles of creating customer value, integrating organisational functions, and achieving profits while satisfying customer needs.
- The purpose of the marketing plan is to ensure that marketing activities in the organisation are relevant and timely, and achieve the organisation's objectives.
- A customer profile or persona is a description of an ideal customer based on their demographic, social and cultural background, values and interests. Gaining an in-depth understanding of the target customer enables companies to focus their marketing efforts and achieve business objectives.
- The marketing mix is a set of actions that companies use to promote the product to the market. For tangible products, the marketing mix consists of the 4Ps: product, price, place and promotion. For services, marketers use an extended marketing mix of 7Ps: product (service), price, place, promotion, people, physical evidence and process. Each of the marketing mix elements have a suite of strategies that are adjusted to meet customer needs and achieve marketing objectives.
- Product and service knowledge includes an in-depth understanding of product features, benefits, and use. To build a relationship with the target customers, organisations need to invest in marketing activities that create a strong brand that creates a perception of the product or service as valuable in the customer's mind in relation to competitors' offerings.
- To undertake marketing activities, marketers need to first identify task requirements such as specific product knowledge, target market, marketing objectives in the marketing plan, and organisational policies. Then they need to review past marketing activities, industry trends and competitors' activities that affect their business, and check if the external environment context has changed since the last planning cycle.
- All action plans should be aligned with the objectives and strategies outlined in the marketing plan.

## Learning Checkpoint 1

### Prepare to undertake marketing activity

#### Part A

1. Which of the following are the components of a marketing plan? Tick all that apply.

- Executive summary
- SWOT analysis
- Competitive review
- Policies and procedures
- Budgets

2. List two organisational policies or procedures and three legislative requirements that may apply to marketing task requirements.

3. Which of the following factors can be used to assess industry trends? Select yes or no for each one.

- |   |       |      |
|---|-------|------|
| a) Number of competitors in the industry sector | » Yes | » No |
| b) Demand for services                          | » Yes | » No |
| c) Industry revenues and revenue projections    | » Yes | » No |
| d) Intensive distribution of products           | » Yes | » No |
| e) Marketing objectives                         | » Yes | » No |

4. List three sources that could be used to research information on industry trends and competitive activity.

5. Number each step from 1 to 6 in the order you would follow to develop an action plan for marketing activities.

- Identify resources, including budget, for each task
- Update action plan regularly when tasks are completed
- Locate a marketing plan and identify specific marketing objectives.
- Prioritise the tasks and specify deadlines and milestones
- Create a list of all tasks to be performed for each marketing activity
- Seek approval for the action plan

6. Which of the following statements are correct regarding approvals of actions plans for marketing? Select yes or no for each one.

- |   |       |      |
|---|-------|------|
| a) Approvals are required to ensure that resources identified for marketing activities are available and related to tasks.                            | » Yes | » No |
| b) Approvals help to ensure that action plans align with the organisation's marketing plan.   | » Yes | » No |
| c) Approvals are always required at the beginning of the marketing activity but are not required during the implementation of the marketing activity. | » Yes | » No |
| d) Approvals of action plans need to follow organisational procedures.  | » Yes | » No |

7. Draw a line to match each of the following statements to the production or the societal marketing concept.
- |                                  |   |
|----------------------------------|---|
| » The production concept         | » The company makes products so that it can create functional, social or monetary value and help to achieve the company's objectives. |
| » The societal marketing concept | » Product packaging is designed for the customer's convenience and should meet environmental requirements.                            |
| » The societal marketing concept | » The company sells products that it can make.  |
| » The societal marketing concept | » The customer relationship is a transaction and happens when the sale is made.   |
| » The production concept         | » Customer satisfaction before and after sales leads to a profitable long-term relationship and should be achieved in an ethical way. |
8. Which of the following statements about the marketing concepts are correct? Select yes or no for each one.
- |  |       |      |
|--|-------|------|
| a) The selling concept is based on aggressive selling and carries high risks.  | » Yes | » No |
| b) The risk of the product concept is that focus is placed on the continuous improvement of the product rather than the actual needs of customers. | » Yes | » No |
| c) The product concept holds that consumers will not buy enough company's products unless they are heavily promoted.                               | » Yes | » No |
| d) The product concept tends to be adopted by companies when the demand for the product exceeds the supply.  | » Yes | » No |
| e) The selling concept starts with defining the market and customer needs.   | » Yes | » No |

- List three features of services that distinguish them from physical products.

## Part B

Read the case study and answer the questions that follow.

### Case study

Choco Dream is a new business that offers premium organic chocolate products. The company has a small flagship store in the Melbourne CBD and runs in-store promotions from time to time to generate sales. Their sales were negatively impacted, however, when customer demand decreased as COVID lockdowns forced people to work from home. Mira is the store manager and she is responsible for all sales promotions and the overall marketing effort. It's up to her to come up with a solution to tackle the falling sales. Mira engages Stefano, a young marketing graduate, to help her with the marketing plan. She briefs him on the new planned product development, and tells him that the company's products are 'for everyone' because who doesn't love chocolate!?

Stefano takes a methodological approach to the task. He identifies that the company keeps making improvement to the product, such as redesigning the packaging and adding new product lines. But he queries who is the target segment for Choco Dream? What needs can the company meet in order to achieve their business goals and grow? Is the entire industry, including their competitors, affected by the change?

Stefano writes a marketing objective 'to increase sales by 30% in the next 6 months'. He reasons that adding an e-commerce function to the Choco Dream website will help to achieve the goal but needs to gain more understanding of all marketing elements and market trends.

- What should Stefano do to find out more about the industry trends and competitors? List two sources of industry and competitor information.

2. Identify the current elements of the marketing mix for Choco Dream.

3. List one way for Stefano to profile Choco Dream's target customer.

4. Identify two aspects of product knowledge that Stefano will need in order to develop marketing action plan.

5. Stefano decides to create an action plan to introduce online shopping. Complete the sections in the action plan below for the given marketing activity:

Marketing Objective: To increase sales by 30% in the next 6 months					
Activity	Tasks	Responsible	Timeframe	Resources	Budget
Enabling e-commerce function on website					





## Topic 2 | Coordinate marketing activities

- 2A Identify and access resources according to action plan
- 2B Contribute to assigning responsibilities and assist marketing personnel
- 2C Monitor implementation of marketing activities according to activity plan

## 2A Identify and access resources according to action plan

To successfully implement marketing strategies, organisations need to allocate resources for each marketing activity.

Allocation of resources is first considered when developing an action plan. The next step is to identify and access the time, people (human resources), and money resources required, and to manage priorities.

### Identifying resources

There are a range of resources that may be required to implement the marketing plan. It depends on the marketing mix strategy.

A marketing resource is any kind of asset that can be used in marketing activities. Marketing resources take many forms, including money (budget), time, staff, materials, technologies, digital assets, brand styles and suppliers.

**Marketing resources** are all assets that can be used by the marketing function to implement marketing strategies.

Below is a summary of the most common marketing resources used to implement marketing activities:

<b>Money</b>	All marketing functions cost money, and no organisation has unlimited funds. All companies want to maximise return on investment and to minimise the cost to achieve their outcomes. The choice of suppliers of materials, media exposure and external marketing expertise is likely to depend on the available budget.
<b>Time</b>	Time is sometimes overlooked as a marketing resource, especially if a company is using internal – so-called ‘in-house’ – resources to reduce costs. However, there can be other perspectives on the use of time as a resource, for example, when allocating the time of employees on marketing activities while they are juggling other work priorities.
<b>People</b>	People resource is about expertise. The marketing expertise may be accessible in the company (in-house), however, some expertise is specific and may not be needed in the company's daily operations, for example, the design of software apps for a particular marketing campaign.

<b>Outsourced resources</b>	Outsourcing is the business practice of hiring a party outside your organisation to perform services that the organisation cannot do in-house, for example, distribution and supply chain management, market research, promotional content creation, media planning, IT solutions and other services that support marketing activities. Outsourcing may be beneficial for short-term projects or when specific expertise is required.
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## Accessing budget resources

As part of the overall business planning and budgeting process, senior management will determine the funds to be allocated to the marketing department. The overall budget allocated directly to marketing will determine the scope of marketing activities. A small marketing budget will require a more economical approach to achieving marketing or promotional objectives, while a large marketing budget allows for the use of expensive high-reach media, such as television advertising or billboards.

There are three key approaches to budgeting in marketing:

Percentage of sales	Affordability	Objective and task
<p>In this model the marketing budget is based on a fixed percentage of sales from previous years.</p> <p>For example, if the company's sales are \$1 million and 10% is allocated each year, the marketing budget would be \$100,000.</p>	<p>With this approach, the organisation works out its spending on all other items and then allocates whatever is leftover to marketing.</p> <p>This approach does not recognise that marketing is an investment designed to generate sales and meet customer needs, and therefore requires specific expenditure from the outset.</p>	<p>This budgeting method recognises that marketing is an investment rather than an expense.</p> <p>'Objective and task' budgets are set based on the organisation's marketing objectives. Each marketing activity is identified and costed and resources are allocated accordingly.</p>

The approach that allocates the marketing budget based on percentage of sales is common but can be disadvantageous when sales drop. The objective and task method is preferred when achieving marketing objectives is prioritised, but most companies compromise and apply some type of a blended approach.

The marketing budget for a given year is often calculated based on the allocated budget and the actual amounts spent in the previous year. As such, you may need to evaluate last year's budget to request new funding.

Below is an example of a monthly marketing budget:

Master Marketing Budget						
	January 2021		February 2021		March 2021	
	Budget (\$)	Actual (\$)	Budget (\$)	Actual (\$)	Budget (\$)	Actual (\$)
Market Research	60.00	40.00	60.00	90.00	60.00	40.00
Owned Media (Blog)	20.00	20.00	20.00	0.00	20.00	10.00
Video Advertising (YouTube)	160.00	130.00	160.00	100.00	160.00	270.00
Social Media Advertising (Facebook)	40.00	36.00	40.00	50.00	40.00	32.00
Marketing Platform (HubSpot)	50.00	50.00	50.00	50.00	50.00	50.00
Creative/Design Software (TBD)	20.00	20.00	20.00	10.00	20.00	0.00
Recruitment (Freelance)	40.00	40.00	40.00	40.00	40.00	40.00
Recruitment (Full-Time)	8,300.00	9,100.00	8,300.00	9,100.00	8,300.00	9,100.00
Hardware	150.00	150.00	150.00	150.00	150.00	150.00
<b>TOTAL</b>	<b>\$8,840.00</b>	<b>\$9,586.00</b>	<b>\$8,840.00</b>	<b>\$9,590.00</b>	<b>\$8,840.00</b>	<b>\$9,692.00</b>

To create and access a marketing budget for specific activities, consider the procedures or policies related to budget and fund management. For example, to access marketing funds, you may be required to build a business case in the form of a presentation or a short report linking the tasks and outcomes for approval.

## People resources

The marketing department or marketing team are the people responsible for the implementation of marketing strategies and activities. However, many organisations have other employees who have the expertise or are interested in contributing to marketing activities. One way to involve them could be to put a list or roster together of who can help with specific tasks, for example, to create a survey to research the customer experience of new product features.

Staff availability needs to be considered before allocating people to marketing tasks. For example, staff members may not be available on particular days and times for many reasons, including work duties, scheduled leave and the terms of their employment. Remember to check any potential irregularities and plan for contingencies and back up if necessary.

If a team member is given more than one task in a marketing project to work on simultaneously, conflicting work priorities can mean the team member faces pressure to complete the task on time. This may impact on their commitment and motivation. In such situations you may consider outsourcing or negotiating their availability with senior managers so they are able to prioritise one marketing task over the other.

To identify and access human resources for marketing activities, consider the following:

<b>The number of staff</b>	<ul style="list-style-type: none"> <li>• How many people are required to complete this activity or task?</li> <li>• Do they all need to be involved at the same time?</li> </ul>
<b>Expertise and skills</b>	<ul style="list-style-type: none"> <li>• What skills and expertise are required for the task?</li> <li>• Can people be trained for the task? How quickly?</li> <li>• Are there any tasks for which there is a gap in knowledge or skills?</li> <li>• Can the skills or expertise be outsourced?</li> </ul>

The nature of the marketing activity will determine the number and type of people required for marketing strategy implementation. For example, a product launch for B2B (industrial) clients may involve all of the in-house marketing team, plus a guest speaker and outsourced catering staff. A pop-up stand in a local shopping centre to launch a new consumer product may only require one or two sales or promotional staff.

When accessing people resources and their expertise for marketing activities, remember to check relevant work policies such as the maximum hours employees can work, whether overtime is allowed, and the penalty rates that may be incurred that would affect the budget. You may need to allocate only a limited number of hours in each day for a staff member to work on a marketing activity.

Another consideration is outsourcing services and the use of contract labour. The use of contactors can be beneficial for short-term projects or when specific expertise is required.

## Managing time resources and priorities

Time is another resource for the business that needs to be allocated and should be managed in the same way as other resources. Action plans should therefore specify the time required for completing each marketing activity and task.

Time management issues relevant to marketing activities include flexibility, prioritisation, inter-dependency and managing the availability of all stakeholders.

<b>Flexibility</b>	Time management in marketing activities can be affected by unforeseen circumstances or events that are out of your control. Each marketing task should be given a time estimate, however, planning a more flexible timeframe will allow you to absorb delays and take advantage of idle time as it occurs.
<b>Prioritisation</b>	It is likely that you will have tasks scheduled that run simultaneously or overlap. This can place demands on the people involved in both tasks, so certain tasks will need to be prioritised to ensure an adequate allocation of time.
<b>Inter-dependency</b>	<p>Certain tasks in the marketing activity will rely on the completion of other tasks. For example, promotional material can be distributed only after the design is approved and it has been printed. These situations can be stressful or can create idle time that is ideally used as a resource for other tasks.</p> <p>In some situations, the same person or workgroup may be assigned different tasks. Conflicting work priorities of team members may put pressure on team members, and require negotiation and agreement between the teams or departments.</p>
<b>Availability</b>	For some marketing activities, organisations involve external suppliers or outsourced services. Working with external stakeholders requires effective communication on a continual basis to coordinate marketing activities, especially if there are any changes to the marketing schedule or tasks. Asking for changes at late notice to external providers may be difficult or impossible and may also incur additional charges, causing a budget blow out.

Managing deadlines and priorities affects the success of the marketing plan implementation. No matter how well you plan, all business activities may be affected by changes. One of the biggest challenges is prioritising tasks.

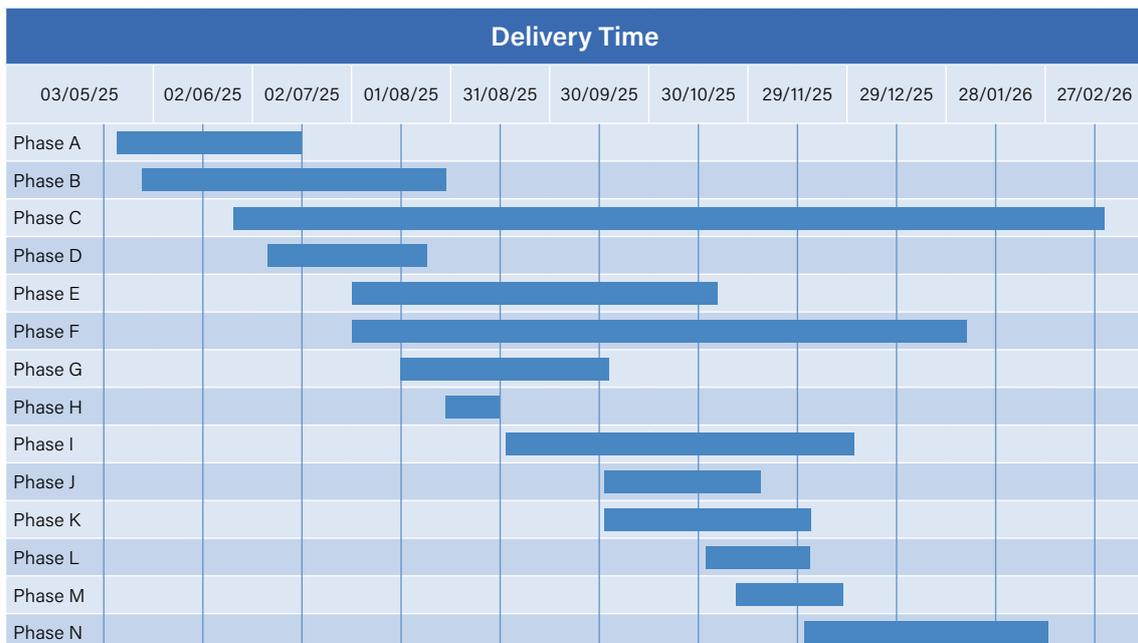
To help you manage the tasks and deadlines, here are some tips on how to choose what to prioritise.

How to prioritise:

- Collect a list of conflicting tasks that need to be done. Do not worry about the order of items at this stage.
- Identify urgent tasks (those which need immediate attention, for example, a deadline for a press release) vs important tasks. This will require considering whether the tasks are inter-dependent.
- Assess the impact to the business of a given task. For example, some tasks may be imperative to achieve the marketing objectives, such as designing and printing sales materials for a sales pitch to a large client. Look for the impact of your work and how many stakeholders are involved.
- Order the task list. Productivity research suggests that starting lengthier tasks earlier can be a more effective use of time, although sometimes it is worth doing a small task quickly to check it off the list.
- Know when to cut. After you prioritise the tasks, estimate how much you can do that day. Seek support for high impact, urgent tasks that you are worried about not being able to complete in time.

Taking control of your time will help you to manage your workload and complete tasks on time. When you set a certain amount of time to complete each task, plan the timeline and outline the key milestones for achieving it. Schedule deliverables before the completion date.

Below is an example of an activity delivery timeline:



Free project schedule templates are available online: [aspirelr.link/smartsheet-project-schedule](https://aspirelr.link/smartsheet-project-schedule)

Free time management tracking apps (such as Toggl and MLO) can:

- help you to use your time more productively by identifying the activities that ‘steal’ your time
- remind you of tasks to do
- automatically track how much time you spend on different projects or tasks (Toggl)
- generate to-do lists (MLO, MyLifeOrganized).

## Outsourcing resources

Some resources that you need to access can be outsourced. Tasks associated with this may include finding suppliers, IT solutions, freelance creative agents and other services.

Some examples are included below:

<b>Suppliers</b>	<ul style="list-style-type: none"> <li>• Suppliers for products or services used in promotional activities, such as hiring equipment for a trade fair, finding packaging manufacturers, etc.</li> <li>• Printers of labels or promotional materials</li> </ul>
<b>IT solutions</b>	<ul style="list-style-type: none"> <li>• Software developers for specific tasks, such as a customised database</li> <li>• IT technicians for promotional events</li> <li>• IT consultants to capture customer experience</li> <li>• Specialised technology and equipment</li> </ul>
<b>Freelance consultants</b>	<ul style="list-style-type: none"> <li>• Supply chain management consultant to set up distribution channels</li> <li>• Copywriters or art directors to develop advertising material</li> </ul>
<b>Agencies</b>	<ul style="list-style-type: none"> <li>• Market research agencies to conduct focus groups to determine customers attitudes towards brands</li> <li>• Media agencies or brokers to buy media time on TV or radio</li> <li>• Travel agencies for interstate or international travel related to brand promotion</li> </ul>

## Contingency planning

**Contingency planning is a pre-emptive approach that allows you to prepare for unforeseen events and thus minimise their impact.**

Contingency planning gives you a ‘Plan B’, a back-up action plan for carrying out activities when circumstances change. For example, a marketing initiative may be affected by staff illness or resignation, industrial action, or the loss of a supplier. Due to unexpected events, the marketing budget may be exceeded and a back-up solution may be required. Contingency planning saves time in the long run and helps you to react quickly to events that may undermine the marketing plan.

The key questions to be considered:

- What could go wrong with this particular activity? What delays could arise?
- What action should be taken to address these issues should they occur?
- What might be done instead of the planned task?
- Is there a substitute for the function or service?

Contingencies may cover:

<b>Time</b>	<ul style="list-style-type: none"> <li>▪ schedule overruns</li> <li>▪ changed deadlines</li> </ul>
<b>Cost</b>	<ul style="list-style-type: none"> <li>▪ unexpected expenses</li> <li>▪ budget exceeded</li> <li>▪ budget cuts due to crisis</li> </ul>
<b>Resources</b>	<ul style="list-style-type: none"> <li>▪ loss of supplier</li> <li>▪ resignation of internal expert staff member</li> <li>▪ machinery breakdown</li> <li>▪ crash of computer system</li> </ul>
<b>Environmental</b>	<ul style="list-style-type: none"> <li>▪ emergency events such as fire or flood</li> <li>▪ global or national political events</li> <li>▪ pandemic</li> </ul>

## Contingency budget

A contingency budget is a sum of money set aside at the start of a marketing activity to be used in case of need. The amount of the contingency budget depends on the overall budget and on the level of risk associated with the marketing activity.

The marketing plan has a budget allocation for the marketing activities, and this budget amount may help you to work out a reasonable contingency for each marketing task in the action plan.

Some organisations have a set formula for contingencies, however, you may use another approach, for example:

- checking what contingencies were needed in previous marketing activities
- adding 10% to the allocated budget as a contingency fund.

A brief example of a contingency plan is included below:

Marketing activity	Tasks	What could go wrong	Contingency plan
B2B relationship building through personal visits and sales presentations	<ul style="list-style-type: none"> <li>Make accommodation arrangements for sales staff travelling interstate</li> <li>Schedule meetings with clients</li> </ul>	<ul style="list-style-type: none"> <li>Sample products not ready on time</li> <li>Accommodation not available with organisation's preferred provider</li> </ul>	<ul style="list-style-type: none"> <li>Use alternative supplier (contact potential suppliers and draw up a list in advance)</li> <li>Use online sample images during the presentation and mail out a sample pack when available</li> <li>Use an alternative supplier (get prices and draw up list in advance)</li> <li>Add 10% budget contingency for the task</li> </ul>

Benefits of contingency planning include:

- allowing for better decisions to be made in emergency situations by focusing on getting the planned activities completed on time.
- helping to avert initial panic and move quickly into recovery mode.
- minimising losses when disruptions occur, for example, a timely back up plan in case the order placement app is not working
- improving the trust of customers in the organisation and fostering brand loyalty by demonstrating that they are capable of handling issues without affecting service to customers.

## Example

### Accessing resources

Eric is a young digital entrepreneur and has three other people in his team. He needs to conduct market research to understand his customers' buying behaviour. Team member Lam has some experience in developing surveys but his main area of expertise is SEO marketing. The group reach an agreement that at this stage, the first marketing priority of the business is to use SEO to generate leads and to develop a new app. That means there are conflicting priorities and limited resources that can be allocated for the market research.

The team decide to explore other options and request quotes from providers. They estimate the cost of Lam's hourly rate and the time required for him to complete the market research task. Although it would have been cheaper to do the research in-house, the business progress would slow down because Lam would not be working on SEO and app development, which are more valuable activities. The team decide to outsource a freelance research consultant to conduct their market research.

## Practice Task 4

### Question 1

Which of the following statements are correct? Select yes or no for each one.

- |   |       |      |
|---|-------|------|
| a) Marketing resources are all assets that can be used by the marketing function. | » Yes | » No |
| b) Marketing resources can be outsourced.   | » Yes | » No |
| c) Time is a resource staff can allocate themselves.                              | » Yes | » No |
| d) Prioritisation means doing the easy tasks first.                               | » Yes | » No |

## Question 2

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Number the steps from 1 to 5 in the order you would follow to prioritise tasks and deadlines.

- Order the tasks in sequence
- Compile a list of tasks to be done to implement the action plan
- Assess the impact on the business and how the task will help to achieve marketing objectives
- Identify the most urgent tasks
- Estimate the time needed for each task

## Question 3

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List two approaches to budgeting for marketing activities.

## Question 4

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Which of the following items relate to identifying and accessing human resources for marketing activities? Tick all that apply.

- The number of people required to complete the tasks
- Expertise required to complete the tasks
- Outsourcing the expertise required to complete the task
- Planning contingencies for budget overruns
- Training staff for specific tasks

## Question 5

---

Which of the following statements about contingency planning are correct? Select yes or no for each one.

- |  |       |      |
|--|-------|------|
| a) Contingency planning is a pre-emptive approach.   | » Yes | » No |
| b) Contingency planning helps organisations to react quickly and save time when unforeseen events occur. | » Yes | » No |
| c) Contingency planning should be done after the disruptive event occurs.                                | » Yes | » No |
| d) Contingency planning identifies actions that can be taken to address delays.                          | » Yes | » No |

## 2B Contribute to assigning responsibilities and assist marketing personnel

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While senior managers are responsible for determining the human resources that are available for implementing the marketing strategy, you will be contributing to marketing activities and supporting marketing teams.

You may be asked to assign responsibilities and functions to employees and external providers, and assist them in managing marketing activities.

### Marketing personnel

Marketing personnel are people working in such fields as advertising, public relations, media planning and sales strategy. In your role, you may be collaborating and assisting marketing specialists from different marketing fields, depending on the type of business or organisation you work for.

For example, you may be working with:

#### Digital marketers

- search engine optimisation (SEO) specialists
- web content writers
- web producers
- pay-per-click managers
- e-commerce marketing managers

#### Market researchers

- market analysts
- market research managers
- insights analysts
- market research interviewers

### Advertisers

- └ advertising coordinators
- art directors and creative directors
- online advertising executives
- promotions and events coordinators

### Product and brand managers

- └ product managers
- brand managers
- brand development managers
- brand partnership managers
- portfolio marketing managers

### Media specialists

- └ social media managers
- media planners
- media buyers

### Customer experience specialists

- └ customer success managers
- customer relations specialists
- user experience analysts

There are many job titles associated with marketing roles in different organisations. Marketing is a collaborative discipline by nature, so there will always be some overlap between roles.

## Assigning responsibilities and functions

Assigning responsibilities for a marketing activity increases efficiency and productivity.

When everyone's responsibilities are assigned, members of the work group have a clear understanding of their role and tasks, and can use their professional strengths to their full potential.

An organisation's employees, casual staff and outsourced workforce (such as consultants and freelancers) need to be identified for the completion of each task in the action plan

Task responsibilities are assigned to a person or group by identifying an individual staff member or a job role (position) and matching the task requirements, for instance:

Activity	Tasks	Responsibility
End of financial year (EOFY) sales promotion	Identifying products for sales promotion and determining pricing tactics	Sales manager (Sally) Product manager (Ali)
	Developing and producing POS (point of sales) materials for retail centres	Marketing manager to outsource Graphic designs and production services
	Communicating with retail channels and wholesale agents Emailing client lists	Marketing manager (Peter) Marketing assistant (Ralph)

Note that organisation practices in assigning functions and responsibilities may vary, depending on the type of the organisation and leadership style. Some large and established companies may have very rigorous procedures, while start-ups or entrepreneurial organisations may have a more flexible approach.

Tips for assigning responsibilities and functions are listed below.

### How to assign responsibilities and functions:

- determine an activity and which tasks need to be done
- identify individual and group strengths and weaknesses
- reflect on who was successful in the past performing similar functions and who may be able to step up into a new role
- consider who can coach or mentor others in the group for future career progression
- refer to the job description and align responsibilities
- consider job design adjustments, if practical
- ask your team for feedback to understand better what is working and not working.

Common challenges in assigning tasks to staff arise from personality types, work preferences, conflicting priorities and limited budgets. The success of the process can also depend on effective communication between the senior management and marketing personnel. This can be achieved by:

- scheduling marketing project meetings
- reporting on the marketing activities status and progress
- facilitating discussions where everyone has the opportunity to share their views
- communicating with all involved about the marketing activities.

In your role, you may be contributing to the allocation of responsibilities by assisting your senior manager to implement marketing processes and communicate to internal and external stakeholders.

Your areas of contribution may include but not be limited to:

<b>Coordinating internal information</b>	<ul style="list-style-type: none"> <li>• collecting information relevant to task requirements</li> <li>• checking work priorities and providing staff availability information for marketing activity schedules</li> <li>• negotiating timeframes of staff for specific activities</li> <li>• communicating to internal staff in a timely manner</li> <li>• scheduling internal meetings</li> </ul>
<b>Coordinating external information</b>	<ul style="list-style-type: none"> <li>• collecting information on external suppliers if in-house resources are insufficient</li> <li>• assisting senior management in outsourcing and assigning job functions by preparing and comparing quotes</li> <li>• scheduling external meetings relevant to technical capabilities or expertise required for the marketing activities</li> </ul>
<b>Reporting</b>	<ul style="list-style-type: none"> <li>• updating information relevant to marketing activities and task priorities</li> <li>• updating contact information of service providers</li> <li>• updating contingency plans relevant to delegation of responsibilities</li> <li>• using digital technology to enable information sharing</li> </ul>

## Communicating effectively when assigning responsibilities and functions

Effective communication in coordinating all marketing activities is important to ensure that your messages are received as they are intended and that miscommunications are avoided.

Effective oral communication in assigning responsibilities and functions will help you to:

- build rapport, collaboration and trust
- reduce, and easily clarify misunderstandings

- reduce errors and mistakes
- resolve tension and potential conflict.

Be mindful of how you express your ideas when you are interacting with others and use appropriate language, for example:

Spelling and grammar	Use of vocabulary	Use of passive and active voice
<ul style="list-style-type: none"> <li>• Structure written and spoken sentences to communicate information clearly.</li> <li>• Spell check all written communications.</li> <li>• Speak clearly and concisely in meetings.</li> <li>• Utilise a clear logical structure in reports and other documentation.</li> </ul>	<ul style="list-style-type: none"> <li>• Use marketing terms appropriately. For example, a 'sales promotion' is different from a 'promotional strategy' and 'product' is not a substitute word for 'brand'.</li> <li>• Avoid technical jargon when communicating to external stakeholders to prevent misunderstandings, for example, SEO may be confused with CEO by non-professional staff.</li> </ul>	<ul style="list-style-type: none"> <li>• Avoid using the passive voice ('the catalogue was finished by the designers') where possible, as the active voice ('the designers finished the catalogue') communicates more clearly who did what.</li> </ul>

To avoid any misunderstandings when assigning responsibilities and functions, listen carefully and use verbal and non-verbal communication skills.

**Active listening** allows the listener to seek clarification and resolve potential misinterpretations of what was heard.

Active listening is about listening to words and the tone and intonation behind the words, observing body language and giving responses to acknowledge the person who is talking. This can be practiced by:

- using verbal nods to show you are listening (e.g. *'Ah'* or *'I see'*)
- using short phrases to encourage the speaker to continue (e.g. *'Could you say more about that?'*)
- reflecting back by summarising (*'I understand this task is almost done'*).

**Questioning** can be used to obtain information and to check for understanding

Asking the right question at the right time will help you to fully understand the task requirements and details of an activity, for example:

- asking a probing question to gain more information or follow up on the action (*‘Where is this information on the production process coming from?’*)
- narrowing down information on the preferred option (*‘Out of these three media brokers, which is your preferred supplier for the campaign?’*)
- asking open question gives you access to an in-depth understanding, for example, *‘What is the new B2B selling process?’*, while closed questions can be effectively used for checking in during a meeting, for example: *‘Does anyone have questions about the brand positioning before we discuss implementation?’*

If you want to make sure that colleagues have understood your message, you can paraphrase their comments or question back, for example, *‘Would you like me to repeat the proposed functions of our team for the action plan?’*

Non-verbal communication accounts for up to 65% of all interpersonal communication and may impact the effectiveness of your oral communication. When communicating with your co-workers, be mindful of your body language and observe the body language of others.

Eye contact	Facial expressions	Gestures and body movement
<ul style="list-style-type: none"> <li>• Eye contact helps to establish rapport and measure the listener’s reaction. When discussing the action plan or explaining functions and responsibilities, try to establish eye contact with each person.</li> </ul>	<ul style="list-style-type: none"> <li>• Facial expressions communicate emotions such as confusion, dissatisfaction and approval. It is also thought that people blink more rapidly when they are distressed. Pay attention to other’s facial expressions, as they may be a good indication of how your suggestions or ideas are being received.</li> </ul>	<ul style="list-style-type: none"> <li>• Gestures are hand or body movements that express meaning or reinforce a message. For example, crossed arms may indicate defensiveness. Or a staff member in a meeting may not say anything overtly but show that they are disengaged by fidgeting and looking away from a co-worker who is speaking.</li> </ul>

## Using technology to assign responsibilities and functions

In your role, you will be using a variety of digital technologies to contribute to the assigning of responsibilities and functions.

This may include using a range of tools, such as:

<b>Schedule planning tools</b>	<ul style="list-style-type: none"> <li>Using electronic calendars to keep track of staff availability</li> <li>Maintaining a team calendar and scheduling internal meetings</li> <li>Using digital time-planning tools</li> </ul>
<b>Digital communication tools</b>	<ul style="list-style-type: none"> <li>Using digital databases for outsourcing</li> <li>Researching websites and obtaining online quotes</li> <li>Using digital reporting tools</li> <li>Using collaborative software</li> </ul>
<b>Digital planning tools</b>	<ul style="list-style-type: none"> <li>Using digital project-planning tools for task planning and prioritising</li> <li>Using shared authoring systems for assigning and reporting on tasks</li> </ul>

The selection of digital apps and software is growing, and there is a wide choice of apps available for iOS, Android and desktop applications.

## Assist required personnel in managing marketing activities

After the resources required for marketing activities have been acquired and responsibilities assigned, your role will be to assist other marketing specialists to implement the action plan.

Depending on the marketing strategy and the size of the company, you may be delegated a range of tasks, such as:

- coordinating external contractors, such as design or IT services
- arranging production delivery schedules for suppliers and obtaining approvals
- coordinating administration tasks for marketing events.

Marketing coordination functions usually involve contributing to the team effort; however, you may also be asked to work independently on tasks in the marketing action plan.

A practical way of approaching this work is to define the scope of the task and break it down into sub-tasks. To ensure the activity runs smoothly, you may wish to create a checklist.

For example, if your role is to assist with running a promotional competition, your checklist may look like this:

Sub-tasks	Completed Yes/No	
Obtain the necessary permit to run the competition	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Source competition prizes	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Organise for the legal team to draft terms and conditions	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Design and print promotional flyers	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Organise for the promotional merchandise to be created and delivered	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Brief the PR team to write the press-release	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Prepare the digital competition forms	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Test the competition app and ensure it is ready for use	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Another technique to break down tasks is to use a visual aid such as Gantt chart, which is a type of bar chart that illustrates a project schedule. It represents the relationship between tasks and time and is widely used by project managers.

You can develop these manually or use Microsoft Project.

The table below describes the features of a Gantt chart and explains how it may assist in implementing each marketing activity:

### 1. Marketing activity details

The Gantt chart shows details of the marketing activity such as:

- major tasks that make up the activity
- dependence between tasks – that is, whether one task must be completed before another can commence
- a time line for each task and for the overall activity.

### 2. Activity implementation details

A Gantt chart assists in implementing each marketing activity by:

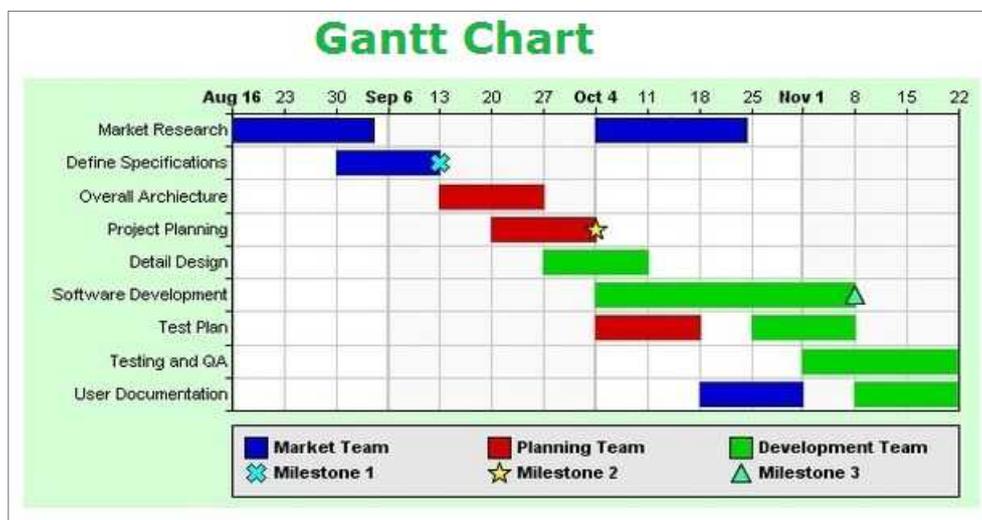
- determining the time required to complete each task and the overall activity
- identifying the relationships and dependencies between tasks to ensure time is managed effectively
- acting as a benchmark for monitoring and reporting on marketing activities
- helping you to delegate tasks.

### 3. Visual representation

A complete Gantt chart illustrates:

- the minimum time required for each task and the overall marketing activity
- the correct sequence of tasks
- tasks that can be done at the same time
- slack or float time (when no tasks are being performed).

Below is an example of a Gantt chart for a new product development project, indicating key milestones from market research to market testing.



Source: Tasko Consulting (2021), [taskoconsulting.com/gantt-chart](https://taskoconsulting.com/gantt-chart) accessed 2 March 2021.

The Gantt chart can be as complex or simple as required. It is set out with tasks listed on the left-hand column of the chart, which can be broken down into subtasks. The columns to the right are used to create a timeline and can represent any frequency of time, such as a day, a week, or a month.

## Alignment with the marketing mix

Even a small marketing task needs to be performed from a perspective of delivering value to the customer and at the same time achieving broader marketing objectives.

While your role in coordinating marketing activities is mostly related to contributing to the marketing efforts and providing assistance to other marketing teams and specialists, remember that everything you do has to be consistent with the organisation's marketing concept and marketing strategy.

Every operational decision that you make when implementing marketing activities needs to be customer-centred. The marketing concept implies that organisations should not focus on what they can produce or what they can sell, but rather integrate all departmental functions in order to create customer value. For example, decisions on outsourcing and selecting suppliers should take into consideration which supplier can help your organisation to provide functional, monetary or social value and build brand equity, rather than selecting the first one on the list or the cheapest supplier.

Key marketing concepts to guide you in undertaking marketing activities are listed below:

<b>Target market</b>	Consider how consistent the implementation choices and decisions are with your target market. Always remember your customer profile (or persona), and their needs and expectations.
<b>Product</b>	Continue improving your product knowledge, whether it is serving a B2B or B2C market. Remember that services are products with intangible features, which adds more complexity in providing customer experience to your target market.
<b>Brand positioning</b>	Brand positioning helps to establish a strong relationship with the target market and create brand loyalty. Every step in the implementation of the marketing activities needs to be consistent with the brand image and its positioning compared to the competitors' offers. This may apply to using images, colours, and training freelancers on brand values.
<b>The marketing mix</b>	The marketing mix is a set of coordinated actions relating to product, price, promotions and distribution strategies. All marketing mix components need to work together, and change in one of the elements may require adjustments to all other components to deliver value to the target market.

For example, when coordinating teams that are working on improving a product or service, communicate any adjustments to distribution channel members as well as marketing communication teams to maintain the integrity of the brand.

## Taking responsibility and problem solving

A variety of professional skills are required to meaningfully contribute to the implementation of the marketing plan, including communication, problem solving and self-management skills.

**Problem solving** skills refer to the ability to handle difficult situations and identify solutions

At every career level, employees are expected to solve problems and make appropriate decisions. In your role, you will be expected to recognise certain kinds of challenging situations and address the problem by finding a solution.

To solve operational problems associated with coordinating and implementing marketing activities, you will use a combination of skills, for example:

- the ability to identify the cause of the issue such as a lag in the schedule or a slump in customer satisfaction – which may involve questioning and listening to other workers and stakeholders, or researching to gather more information
- the capacity to think through potential solutions and make decisions as to how to proceed – requiring you to consult with other team members or senior managers
- the ability to communicate with others effectively and choose the best channels for communication, for example, phoning or speaking face-to-face in cases where immediate action is required.

Organisations expect junior marketing staff to work independently when needed and take responsibility for the decisions related to their own role. When assisting other marketing personnel in managing marketing activities, discuss your role in the marketing project and what the reporting procedure is with your senior management. This will enable you to identify any skill gaps, improve your capabilities, and grow your professional competence and contribution to the organisation.

Below is an example of a problem-solving process:

<b>1</b>	<b>Identify the problem</b>	To identify the problem, you need to investigate the current situation and assess who the problem is affecting as well as looking at contributing factors and where they are coming from.
<b>2</b>	<b>Generate options</b>	Generate options for potential solutions. This may require more research or collaboration with your peers and management.
<b>3</b>	<b>Choose a solution</b>	Analyse each solution and select the best one. This will require decision making skills, and evaluating criteria such as urgency or impact of the solution.
<b>4</b>	<b>Take action</b>	Take action to implement your preferred option. You may need to collaborate and communicate with other stakeholders.
<b>5</b>	<b>Review and monitor</b>	Monitor how the solution is working, ask for feedback, and determine if any further action is required.

In your role, you will be continuously solving problems and making decisions related to:

- prioritising and managing tasks
- responding to requests
- responding to new and changing circumstances
- dealing with other teams and departments
- selecting the most effective tools and techniques to implement activities.

## Example

### Problem solving in managing marketing activities

Beauty 2 You is a small business selling organic personal and skin care products in local health outlets. Jo is the new marketing coordinator who is responsible for assisting sales manager Will in managing supply chain activities.

During a sales promotion campaign that Beauty 2 You is running, it is crucial that the supply chain of products to outlets runs smoothly and without interruption. Unfortunately, one of the partnering outlets complains to the sales manager that the delivery of products has been inconsistent.

Jo assumes that the problem lies with a new distributor who does not pick up deliveries on time. She has texted them reminders but for some reason collection patterns are not improving. Jo decides she needs to investigate further and uncovers that the issue is due to a faulty software update which caused some of their communications to get stuck on the server.

Jo speaks to Will to brainstorm some options to solve the problem. They come up with four options, which include manual checking of listings, doing a phone follow up, emailing and using another distributor. Considering the urgency and the impact of the problem, Will and Jo take the decision to schedule regular check-ins and phone calls with the designated driver. The following couple of days Jo monitors the deliveries and is satisfied that their chosen solution is working.

## Practice Task 5

### Question 1

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Which of the following statements about assigning responsibilities are correct? Select yes or no for each one.

- |   |       |      |
|---|-------|------|
| a) Assigning responsibilities increases efficiency of marketing activities.             | » Yes | » No |
| b) There will only be one person who assigns responsibilities.                          | » Yes | » No |
| c) Each task in the action plan should have a responsible person identified.            | » Yes | » No |
| d) Common challenges in assigning tasks to staff are related to conflicting priorities. | » Yes | » No |

### Question 2

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List two digital tools that can be used for assigning responsibilities and functions.

### Question 3

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List three examples of communication skills that can be used to avoid misunderstandings and mistakes in implementing action plans.

## Question 4

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Draw a line to match the problem-solving process stages to the appropriate step.

- |                                   |   |
|-----------------------------------|---|
| » Find solutions                  | » Gather more information on the situation or problem                       |
| » Find solutions                  | » Listen to the customers and your team to learn more about the situation   |
| » Identify the cause of the issue | » Identify options for actions  |
| » Identify the cause of the issue | » Collaborate with the team to establish criteria for selecting the options |
| » Choose a solution               | » Make a decision and take action   |
| » Implement the solution          | » Evaluate options according to the selection criteria                      |

Read the case study, then answer the questions that follow.

### Case study

Jason is a junior marketing officer assisting marketing manager Yui to implement the marketing plan of a retail fashion brand eXcite. The marketing plan has established a strategic marketing goal to build customer brand loyalty. This means that the organisation needs to improve customer experience and retain more customers. Yui has briefed her marketing team that the marketing objective her team needs to focus on is 'to increase customer retention by 20% in the next 12 months'.

Currently, a range of activities are planned for the financial year, and Jason is assigned to work with the customer experience team on the customer experience (CX) program. In his role, Jason will be helping to coordinate customer feedback activity and communicating the outcomes to Yui and CX manager Fiona.

The customer experience team and marketing team were asked to come up with more ideas to achieve the marketing objective. The CX team brainstormed many ideas with the customer service consultants on the floor, who proposed bringing many coloured balloons into the retail store to entertain customers and to play electronic style music. They are very excited to implement them.

## Question 1

List three people at eXcite that Jason will be working with and assisting with the implementation of marketing activities.

## Question 2

Develop a checklist for Jason to break down the customer feedback activity into smaller sub-tasks.

Sub-tasks	Completed Yes/No	
	» Yes	» No

### Question 3

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Identify three guiding principles (or criteria) to evaluate the ideas brainstormed by the customer experience team.



## 2C Monitor the implementation of marketing activities according to the activity plan

Monitoring progress according to the activity plan is critical to implementing marketing activities.

To monitor something, is to check on its progress. In this context, it is important to monitor the progress and delivery of a marketing project or task. To monitor something involves using information gathered to assess how the intended objectives have been met. Monitoring is also a tool to identify and control risks.

Monitoring the progress of marketing activities

We have already seen that marketing activities should be broken down into a series of tasks and sub-tasks. The progress of each team member needs to be monitored to ensure they are playing their part in implementing the overall marketing activity.

As each team member performs their tasks, there are several factors that must be monitored, as outlined below.

<b>Quality</b>	<ul style="list-style-type: none"> <li>Just because a task has been completed does not necessarily mean that it has been completed to the standard required. Quality of work needs to be assessed and coaching members of the marketing team may be required if the expected standard has not been met.</li> <li>If a task has not been performed to standard, this can affect the outcome of the marketing activity.</li> </ul>
<b>Time</b>	<ul style="list-style-type: none"> <li>Marketing outcomes and work activity plans must have set time frames for completion. Monitoring people's progress ensures that deadlines are met, as resources can be reallocated if someone is falling behind or a delay occurs.</li> <li>Monitoring is particularly important when the completion of a task by one team member is essential for another team member to meet their deadline.</li> <li>All tasks must be completed on time in order to meet the final deadline for the marketing activity.</li> </ul>
<b>Budget</b>	<ul style="list-style-type: none"> <li>Expenditure must be carefully monitored to ensure budget blow-outs are avoided or at least picked up early. This allows the organisation to meet or reduce the additional cost, or reallocate funds to cover it.</li> <li>If tasks are not performed to budget, then the marketing activity may have to be downgraded.</li> </ul>
<b>Marketing strategy</b>	<ul style="list-style-type: none"> <li>As well as monitoring individual tasks, you must also keep sight of the whole picture. This involves having an overview of how the tasks, and the marketing activities they support, fit into the organisation's marketing mix.</li> <li>Tasks must align with the marketing plan and strategic marketing objectives.</li> </ul>

Monitoring marketing activities requires:

- identifying marketing tasks
- identifying metrics so you can measure outcomes
- identifying tools and methods for monitoring performance
- checking the progress regularly
- ensuring that people are doing their tasks to an acceptable quality
- making sure that the tasks support the marketing outcomes and fulfil the marketing objectives.

## Monitoring tools

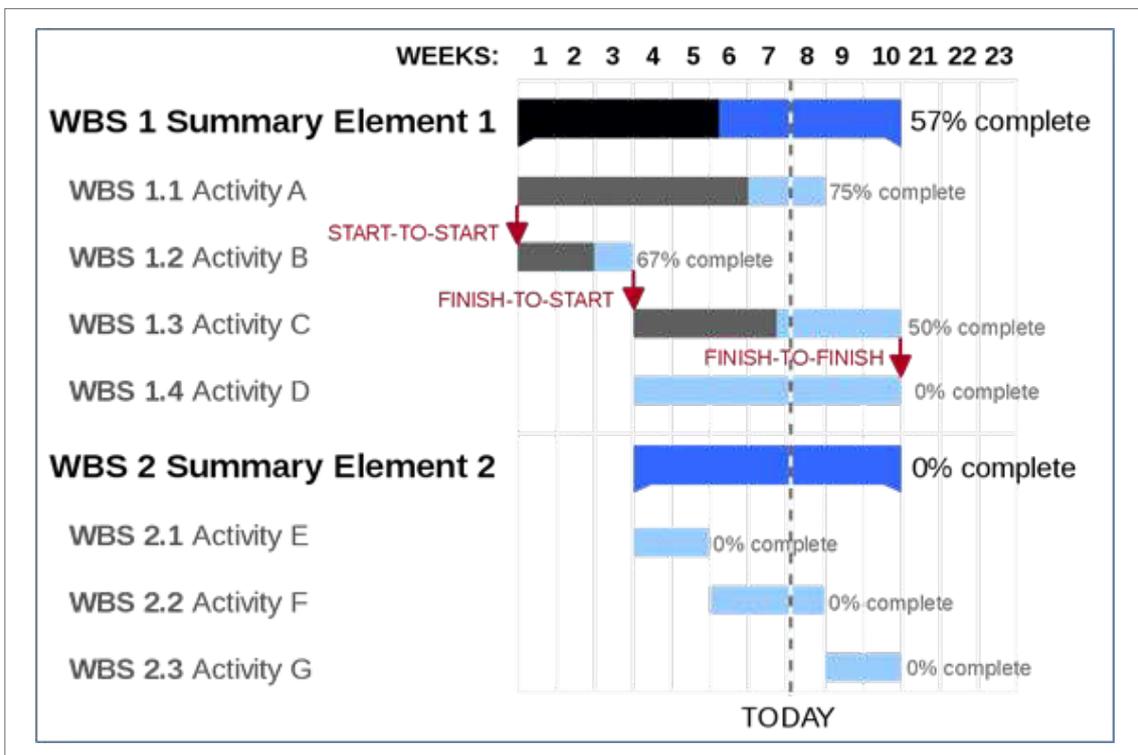
To keep up to date with the team's progress in implementing marketing activities, you can monitor the performance and discuss it in a regular meeting.

Progress meetings are a great way to ask and receive feedback on the tasks and the challenges people are facing, and to maintain consistent communication between all personnel involved.

Below are some examples of tools for monitoring the implementation of marketing activities:

Monitoring tools
<ul style="list-style-type: none"> <li>▪ Formal progress reviews</li> <li>▪ Informal discussions on the completion of tasks</li> <li>▪ Checklists for tasks</li> <li>▪ Visual charts such as Gantt charts</li> <li>▪ Collecting work samples</li> <li>▪ Peer review of completed tasks</li> <li>▪ Manager's review of tasks</li> </ul>

Visual planning tools such as Gantt charts enable you to see the project ahead and monitor for contingencies. This layout can make it easier for the marketing team to visually anticipate issues that may arise and cause a problem during the implementation.



Source: Wikimedia Commons, 2020.

## Example

### Monitoring implementation of marketing activities

Anne is a marketing coordinator in a furniture manufacturing company, and she is assisting her team to implement a spring promotional campaign. The campaign involves updating product information on the company's website and emailing their newsletter using the company's database.

Anne has created a simple Gantt chart to monitor the implementation of tasks in preparation for the launch. The chart will enable Anne to check the progress of all tasks at a glance.

Tasks	Responsibilities	May										
		Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	
		11	12	13	14	15	16	17	18	19	20	
Prepare cost estimate and get approvals	Anne											
Write copy	Freelance copywriter											
Proofreading and approval	Stephanie (marketing manager)											
Uploading new copy and images onto company website	Peter (IT consultant)											
Email copy	Anne Stephanie											
Database listing compiled	Anne											
Mailout	Anne											
Customer survey questionnaire	Ali (marketing officer)											
Survey distribution	Anne											

## Practice Task 6

### Question 1

---

Which of the following statements about monitoring the implementation of marketing activities are correct? Select yes or no for each one.

- |  |       |      |
|--|-------|------|
| a) The progress of each team member should be monitored.   | » Yes | » No |
| b) Monitoring is a regular activity.   | » Yes | » No |
| c) Visual tools such as Gantt charts are mandatory in monitoring the implementation of activities. | » Yes | » No |
| d) A monitoring review should be conducted every week.   | » Yes | » No |
| e) Checklists can be used for monitoring progress.   | » Yes | » No |

### Question 2

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List three aspects of a task that should be monitored according to the activity plan.

### Question 3

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Number each step from 1 to 6 in the order you would follow to monitor marketing activities.

- Checking the progress regularly
- Making sure that the tasks support intended marketing outcomes and objectives
- Identifying marketing tasks
- Identifying tools and methods for monitoring performance
- Identifying factors for monitoring and metrics to measure outcomes
- Ensuring and verifying quality of implementation

## Summary

- To successfully implement marketing activities, organisations need to allocate money, time and people resources to each activity. Some resources may need to be outsourced, which can be a more time- and cost-effective way to achieve marketing goals.
- Managing time as a resource will help you to complete tasks on time, although it may sometimes be challenging to prioritise and navigate conflicting needs or staff availability. Digital software can be used to track time and milestones effectively.
- Contingency planning helps the team to prepare for unforeseen events and minimise their impact. Each marketing activity in the action plan should have contingencies in place related to time, cost, and resources.
- Assigning responsibilities for a marketing activity increases efficiency and helps every group member to have a clear understanding of their role and tasks. Effective listening, questioning and technical skills are helpful for coordinating communication and allocating tasks to people.
- Assistance in marketing activities may include a variety of tasks such as coordinating contractors, schedules and performing administration functions. A practical approach to undertake such work is to define the task and then break it down into subtasks. Using visual project management tools can help you to see tasks and timelines at a glance.
- Monitoring progress of tasks against the activity plan is critical because it helps you to assess how the intended marketing objectives have been met and to control risks. Factors to monitor include quality of work, timeframes for completion, expenditure and staying on track with the overall marketing strategy.

## Learning Checkpoint 2

### Coordinate marketing activities

#### Part A

1. Identify two key types of resources that need to be accessed to implement marketing activities.

2. Which of the following statements relate to identifying resources for an action plan? Tick all that apply.

- Organisations should only specify marketing specialists as a resource in the action plan.
- The choice of suppliers may depend on the budget.
- Outsourcing may help to solve conflicting work priorities.
- Organisational policies may impact on resource allocation.
- Deliverables in the action plan should be scheduled before the due date.

3. List two benefits of contingency planning.

4. Select true or false for each of the following statements:

- |  |        |         |
|--|--------|---------|
| a) A budget allocation is the amount of funding designated to each marketing activity.   | » True | » False |
| b) Organisations analyse budget and actual spent to evaluate the effectiveness of the money spent and to improve resource allocation for marketing activities. | » True | » False |
| c) Percentage of sales is the best method to budget for marketing activities.  | » True | » False |

## Part B

Read the case study and answer the questions that follow.

### Case study

Taste Biz is a growing convenience food chain that has stores in the metropolitan areas of all states. Their marketing performance results are encouraging, and the company has decided to invest \$700,000 into marketing activities in the next financial year.

The marketing department has developed a marketing strategy with a focus on using social media to promote new product lines. The marketing team consists of the manager, Tom, two marketing officers Ling and Justin, and marketing coordinator Julius. The sales team collaborates with the customer service team; however, the marketing department operates in a more autonomous manner.

The marketing plan indicates that a new product line of nutritious smoothies is planned for April–May. The sales team is preparing for the launch, and the marketing department is responsible for producing the promotional materials for the campaign. The department does not have expertise in social marketing and SEO strategies, and will need to acquire the expertise in a very short time. The deadline for the launch is tight, and everybody is anxious.

1. In his role, Julius needs to identify and access resources for the social media campaign. Suggest two ways how he should approach the task.

2. Identify one digital tool that Julius could use in assigning responsibilities and functions.

3. Currently, sales and customer departments are working in a coordinated manner, but communication with the marketing team is irregular. What could Julius do to contribute to Taste Biz marketing goals more effectively? List two suggestions.

4. Julius is assigned to help with the promotional campaign on social media. List two approaches that Julius could take to assist his team.

5. To assign functions and responsibilities to relevant personnel, Julius needs to clarify marketing task requirements. Give one example of a communication skill he needs to apply.

6. When coordinating in-coming data on sales from different states, Julius regularly encounters a problem that some specific information is not included. This results in multiple follow-up emails which sometimes impacts on other tasks. Suggest one method Julius could use to solve the issue and provide one example of this method.

Taste Biz does not currently have social marketing expertise. Marketing manager Tom approved the budget for outsourcing to freelance consultants for the promotional campaign. The media campaign will start in a week and is scheduled to run for two months, according to the approved media plan. New marketing content will need to be uploaded on three digital platforms. For each platform, the images need to be adjusted to the required format. New written content also needs to be created every week.

7. How can Julius monitor the implementation of the promotional campaign? Suggest one tool and provide an example of how it could be used.



## Topic 3 | Review marketing activities

- 3A Measure and record outcomes against the marketing plan
- 3B Review results against expected marketing plan outcomes
- 3C Prepare a report and share it with relevant personnel

## 3A Measure and record outcomes against the marketing plan

Measuring outcomes against the marketing plan allows marketers to identify effective strategies and areas of underperformance, and suggest improvements.

The effectiveness of marketing activities is measured by comparing the outcomes obtained against the marketing plan. The process is similar to the review process you undertook of previous marketing activities before implementing the marketing plan, only now you will be able to use actual information collected during the monitoring stage for the review. This will give a more detailed picture of what worked and what didn't.

The process of measuring outcomes includes:

### 1. Identify key areas of measurement

The structure of the marketing plan clearly outlines key marketing strategies, such as product development, building brand equity or introducing new distribution channels.

In a well-prepared marketing plan, specific marketing activities are aligned to each marketing objective. For example, a promotional campaign is designed to build brand awareness, and a sales promotion is carried out to support the launch of a new product.

### 2. Specify units of measurement

After identifying the activities for measurement, make a decision on what exactly you will measure.

For example, to measure the effectiveness of a promotion campaign, you may need to measure brand awareness or recall, i.e. the proportion of customers who know or can recognise the brand.

Website traffic can be measured using website data analytics on visitors' engagement and hits, measured by 'click per minute', and 'cost per click'. You can also measure customer engagement by counting the number of online enquiries made during the marketing activity.

### 3. Select measurement methods and techniques

Different marketing activities will require different methods of measurement. For instance, customer engagement in an online marketing campaign can easily be measured using data analytics, and does not require a direct contact with customers.

If you want to gauge customers' experience in interacting with your brand, however, you may need to organise focus groups or conduct a customer survey.

The key way of measuring the effectiveness of particular marketing activities is to compare the outcomes against the marketing objectives they were undertaken to achieve.

The most common areas of measurement include:

<b>Sales and market performance</b>	<ul style="list-style-type: none"> <li>• increase of sales in dollars or in volume (sales units)</li> <li>• number of leads generated and lead conversion rate</li> <li>• number of new customers (especially for B2B services)</li> <li>• increase in the company's overall market share or an increase in the market share of a particular product line</li> </ul>
<b>Customer value</b>	<ul style="list-style-type: none"> <li>• increased customer loyalty measured by customer retention</li> <li>• better customer perception of service or product experience</li> <li>• better perceived financial, social or functional value of service offering</li> </ul>
<b>Brand equity</b>	<ul style="list-style-type: none"> <li>• improved brand awareness measured by brand recall</li> <li>• improved perception of brand image as measured by qualitative research</li> <li>• increased level of brand loyalty among consumers</li> </ul>
<b>Promotion effectiveness</b>	<ul style="list-style-type: none"> <li>• number of product or service trials (e.g. test drives of a new car model)</li> <li>• website traffic</li> <li>• engagement by customers on social media</li> </ul>
<b>Distribution and supply chain</b>	<ul style="list-style-type: none"> <li>• increase in number of distributors or percentage of new distributors</li> <li>• improvement of customer delivery times</li> </ul>

## Sales and profit

Sales and profits are clear indicators of marketing and business success. For companies servicing the business-to-business (B2B) segment, sales effectiveness can be measured by lead generation and conversion rate. Leads can be generated by a variety of marketing activities such as email marketing or social media promotions. Companies may want to measure how many new clients they gained through referrals, or calculate the lead conversion rate or cost-per-lead, for example:

Lead conversion rate	Cost per lead
If the campaign brought 1000 new visitors from which the company got 10 leads, that is a 1% conversion rate.	<p>If the budget for the marketing activity was \$1,000, which generated 10 leads, the cost per lead is \$100.</p> <p>It is important to note that this measurement does not measure the quality of leads, and the fact that only a few actual sales may result out of 10 leads.</p>

Marketing activities may be interdependent, and sometimes there can be a lag between the implementation of a marketing activity and its outcomes, for example, between a brand awareness campaign and its impact on sales. If sales and profits are analysed too soon after implementation, the full effect of the marketing activity may not be captured.

## Customer value

Creating customer value is critical for organisations that are using the marketing concept. The idea of customer lifetime value (CLV) is one way to measure the value of loyal customers to the company and can be calculated using the formula:

- $CLV = \text{average sale per customer} \times \text{average number of times a customer buys per year} \times \text{average retention time in years for a typical customer}$

## Promotion effectiveness

Promotional activities can be measured in different ways. One of them is the net promoter score (NPS). The NPS measures the willingness of customers to recommend a company's products or services, as well as a customer's overall satisfaction with a company's product or service, and their loyalty to the brand.

NPS can be measured by customer experience satisfaction surveys, the results of which place customers into three groups: promoters, passives and detractors. Promoters are loyal and enthusiastic customers, passives are satisfied but not enough to write a review and willingly promote the company, and detractors are customers who have had a negative experience. The NPS is calculated by subtracting the percentage of detractors from the percentage of promoters.

For example,

- if 50% of respondents were Promoters, and 10% were Detractors, the NPS is a score of 40.

Promotional activities that include the use of media channels can be measured by the concepts of 'reach' and 'frequency' as well as cost per contact, CPM – cost per mille (thousand), cost per Click, and other metrics. Media channels can range from radio, print and TV to online media such as website banners, popups, and Instagram engagement. Reach refers to the size of the target market reached by the promotional campaign or advertising, and frequency indicates how often they could have been exposed to the brand message. If the media channels used are not based on the customer profile, it is likely that much of the media budget will be wasted, as the wrong people will be receiving the message.

## Brand awareness and positioning

Brand awareness measures the proportion of the target market that is familiar with the brand. Keeping in mind that a brand is more than a product or service in itself, brands create relationships with customers. The stronger the association, the more likely it is that customers will continue buying the brand and bring profit to the company through repeat purchases (loyalty).

Brand equity is measured by recall, for example, how many customers remember a brand spontaneously when asked about it, or with a prompt, or not at all. A questionnaire with simple yes/no questions can be used to measure awareness.

Brand positioning refers to customers' perception of the brand when compared against competitors' offerings. Perceptions and attitudes are more difficult to measure and surveys may need more complex and probing questions such as, 'What do you feel when using product X?' and, 'How much do you enjoy service Y compared to service Z'.

## Qualitative and quantitative measurements

Some aspects of buyers' behaviour are difficult to measure because they relate to customers' perceptions, or associations they have with a product that may influence them. It is important to distinguish between quantitative data (something that can be counted or measured) and qualitative data (something unquantifiable, such a feeling or experience):

Quantitative data	Qualitative data
<p>Quantitative data is information that can be counted or measured, such as percentage of sales, cost per lead, and percentage of customers who are aware of your brand.</p> <p>This can be expressed in numerical or statistical data, for instance, media effectiveness is measured by reach, which is expressed as a percentage of the target market, and frequency, which is the number of times someone has been exposed to the brand.</p>	<p>Qualitative data is information that relates to something intangible, such as an experience or association. In this context, it relates to customer associations, the emotions they experience when using the service or product, and the psychological or social value that a service has given them.</p> <p>Qualitative data is difficult, if not impossible to express in numbers, and usually needs to be collected in interviews and focus groups, or by analysis of social media engagement (customers' posts or reviews).</p>

More information on specific measures for measuring marketing activities can be viewed here: [aspirelr.link/active-campaign-marketing-report](https://aspirelr.link/active-campaign-marketing-report)

## Using digital technology

Digital technology can provide an effective way of measuring campaign effectiveness and customer experience. Some tools and techniques that can measure the effectiveness of marketing activities are:

Measurement techniques include:

- online surveys using questionnaire apps
- customer experience feedback apps
- virtual focus groups in real time, via a conferencing platform such as Zoom
- data analysis of interaction on digital platforms
- website data analytics

The advantages of using online platforms for surveys include free limited access, easy-to-use tools to build questionnaires and time efficiency. Survey Monkey is a popular online platform that you can learn more about here: [aspirelr.link/survey-monkey-make-money](https://aspirelr.link/survey-monkey-make-money)

Other data to measure sales or market performance can be obtained by generating internal sales reports for the period of the marketing activity, and finding industry data on the market share of competitors.

## Recording outcomes against the marketing plan

Create a comprehensive summary of the implementation of marketing activities by recording the key findings.

You can structure your report using key sections of the marketing plan and showing how they are aligned to the marketing objectives. Add a column for outcomes to make it easy to see the results. As you may remember, each marketing activity is broken down into specific tasks in the implementation stage, and the action plans should have specified what exactly was required for its implementation.

An example of a template is included below and can be modified to meet the requirements of your organisation:

Marketing objective	Activity	Measured outcomes
To increase gym membership by 10% during the first 3 months.	Promotional campaign online and sales promotion using personal sales	3000 hits during the 3 months of the campaign 10 new enquires per day 3 sales per day Cost of lead \$10

### Example

#### Measure outcomes of marketing activities

At a budget airline, marketing manager Amanda has begun the process of reviewing the marketing activities that were implemented to improve airline sales. The marketing strategy was aimed at reinforcing their value-for-money brand image and their focus on family holiday travellers.

The marketing program ran from January to October. The time frame for achieving the desired outcomes was six months. In May of the following year, Amanda began to review the outcomes of the marketing activities in the six-month period from November to April. To do this, she collected the following information:

- Passenger numbers and ticket sales. Market share data information was adjusted for seasonal and economic factors and indicated that the promotional and pricing marketing strategies has brought customers back to the airline. Passenger numbers and ticket sales had been rising 5% month-on-month since March.
- Effectiveness of advertising. Independent market research agency data suggested that television and print advertising had been getting through to customers. For example, 80% of regular travellers nominated the airline as their first choice when booking holiday flights, up from 40% prior to the campaign.
- Improvements to products and service quality. Customer experience survey responses showed that 90% of travellers nominated the improved self-check-in services as a factor in securing their repeat business.

## Practice Task 7

### Question 1

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List two steps in the process of measuring the outcomes of marketing activities against the marketing plan.

### Question 2

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Give one example of a qualitative measure and one example of quantitative measure.

### Question 3

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Give one example of recorded outcomes of sales activity using the template below:

Marketing objective	Activity	Measured outcomes
To increase sales of the service by 10% during the first 4 weeks.	Personal selling presentations	

## 3B Review results against expected marketing plan outcomes

Reviewing the results of marketing activities helps you to see what worked and what did not.

Measuring the outcomes of marketing activities and understanding the results enables marketing personnel to determine whether the organisation achieved the desired results and calculate the return on investment.

To draw conclusions on the effectiveness of the marketing strategies, the outcomes of marketing activities need to be compared with the expected results outlined in the marketing plan.

### Variance analysis

Variance analysis is a tool used to compare the actual outcome with the desired outcome.

Variance analysis works by taking the actual outcome and comparing it with the expected outcome of a particular measure, such as sales volume, increase of brand equity or customer loyalty.

When marketing outcomes are made measurable and specific, comparing the actual and planned results becomes straightforward. This makes the review of marketing activities much easier.

You may wish to supplement your template of recorded outcomes by inserting a column for the expected outcome of each activity as stated in the marketing plan, for example:

Marketing objective	Activity	Actual outcomes	Expected outcome
<ul style="list-style-type: none"> <li>To increase gym membership by 10% during the first 3 months.</li> </ul>	<ul style="list-style-type: none"> <li>Promotional campaign online and sales promotion using personal sales</li> </ul>	<ul style="list-style-type: none"> <li>3000 hits during 3 months</li> <li>10 new enquires per day</li> <li>3 sales per day</li> <li>Cost of Lead \$10</li> </ul>	<ul style="list-style-type: none"> <li>3500 hits during 3 months</li> <li>12 new enquiries per day</li> <li>5 sales per day</li> <li>Cost of Lead \$8</li> </ul>

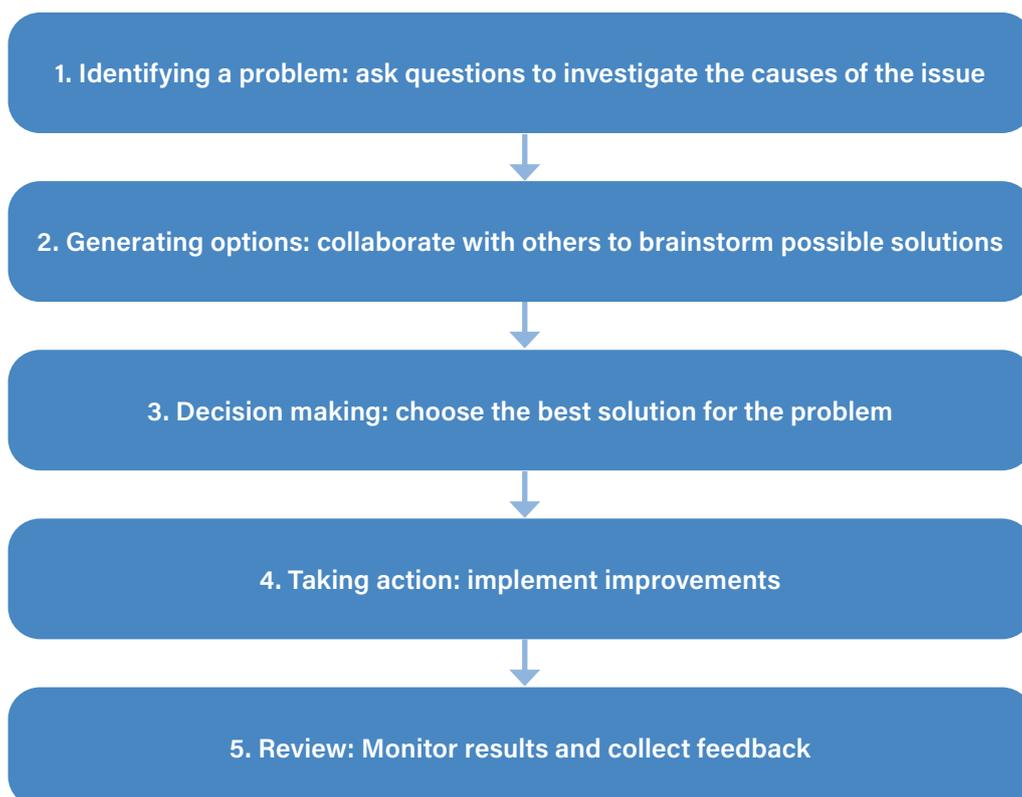
For a comprehensive review, look at each marketing activity separately. The more data you have for evaluation, the better decisions your marketing team can make to improve marketing strategies and create customer value long-term.

## Understanding the results

Some of the results may be difficult to interpret and you may need to seek feedback from other marketing specialists, especially if some data appears to be conflicting. For example, sales performance may not have improved as intended, but brand awareness may have increased.

In this instance, there may be more complex reasons for sales underperformance, and it is important to consider the resources allocated for marketing activities to get the full picture. For instance, there might have been an adequate investment into the promotional campaign, but the sales force may not have been trained on the new product features, which caused a misperception of the value to the customer.

A common problem-solving process outlines the first step as asking questions to investigate the underlying reason of the issue:



Below are some questions you might ask to help you identify gaps in marketing activities:

### Time resources

- Was the timeframe for implementing the marketing activity realistic?
- Were all tasks completed on time?
- Were there any tasks that should have been allocated more or less time?

### Quality of the planning process

- Was the marketing plan specific enough for implementation? For example, were marketing objectives clearly defined?
- Were marketing activities and tasks well scheduled?
- Were the organisation's policies and procedures used to inform the action plan?
- Were reporting and monitoring procedures clear and effective?

### Budget

- Was the overall budget allocated to the marketing activity sufficient?
- Which items went over or under budget?
- Could cost savings have been made in any areas?

### People

- Were there enough personnel devoted to performing each task?
- Did the personnel have the required knowledge, experience and skills?
- Could the responsibilities have been assigned better? If so, how?
- Was there effective communication during the implementation? If not, how could it have been improved?

### Suppliers and outsourcing

- Did suppliers provide products on time and to the required standard?
- Was outsourcing cost effective?

Addressing these questions and working in collaboration with other marketing specialists will help you to better understand the organisation's marketing practices and how to improve them.

In reviewing and reporting on marketing activities, consider how the activities contributed to the success or not of the organisation's marketing objectives. The following questions will help your analysis:

#### Choice of marketing activities

- Was the marketing activity best suited for achieving the organisation's marketing outcomes?
- Did each marketing activity reinforce the overall brand image and market position?
- Did the marketing activity reach the target market?
- What were the most effective marketing activities?

#### Marketing mix strategy

- Which features and benefits of the product/service best satisfied customer needs?
- How did customers respond to the pricing strategy?
- How accessible was the product or service for the target customer? (i.e., how effective was the distribution strategy?)
- Which elements of the promotional mix were most effective?

## Example

### Reviewing marketing activity results

Joshua is a promotional officer in a subscription-based health food company, Vita Taste, which provides minimally processed meal options to busy metropolitan professionals. The company has an ambition to grow, and Vita Taste set a marketing objective to increase subscriptions by 20% in the following 3 months. To achieve the objective, the company launched a new plant-based menu and planned an online promotional activity to generate sales. The promotional strategy also involved using personal sales to B2B, focusing on local businesses in the area.

After 3 months of campaigning, Joshua reviewed the results against the objectives, thus measuring the actual performance. He found that website hits exceeded the planned target, however, subscriptions had not reached the desired result.

To better understand the outcomes, he interviewed the sales consultants and reviewed B2B customer feedback. The findings suggested that although there was a lot of interest in the company's new offering, the sales force did not have sufficient product knowledge and were unable to answer specific customers' questions on the nutritional value of meals.

The reasons for failure were identified as a lack of prioritisation of promotional tasks, such as preparing informational leaflets, and coordinating promotional content on the company's website.

## Practice Task 8

### Question 1

Which of the following statements about reviewing results are correct? Select yes or no for each one.

- |   |       |      |
|---|-------|------|
| a) Variance analysis is a tool to compare actual outcomes with the intended outcome.  | » Yes | » No |
| b) The results you obtain may need further interpretation from marketing specialists. | » Yes | » No |
| c) Every activity needs to be reviewed.   | » Yes | » No |
| d) If the data conflicts, it is better to leave it out of the review.                 | » Yes | » No |
| e) Questioning the allocation of resources falls outside of the review task.          | » Yes | » No |

## Case study

At the request of her marketing manager John, Gina is reviewing the activity outcomes of a marketing campaign. She has collected information on each marketing activity according to the marketing plan. They are:

- an in-store sales promotion campaign
- a social media campaign on Instagram
- customer experience research.

Data indicated that the campaign generated sales of \$200,000 during a six-month period. Gina collected images used on Instagram, and customer engagement data, which indicated 20,000 new followers. Customer experience research findings showed that customer satisfaction was at least 85%. Gina decides that these results are impressive and writes a short summary of her findings for John. She presents her findings and concludes that the campaign has been a success.

John does not agree. He says her review is based on her personal opinion and he asks her to compare the actual results with the projections in the marketing plan. How could Gina improve her review?

## Question 1

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List one tool that Gina could use to help her to critically review the results of the marketing activities.

## Question 2

Using the template below, populate the empty fields with some findings for Gina’s review.

Marketing objective	Activity	Findings
(Gina needs to locate the marketing objectives in the marketing plan)	Sales promotion	
	Social media campaign	
	Customer experience research	

## 3C Prepare a report of marketing activities and share it with relevant personnel

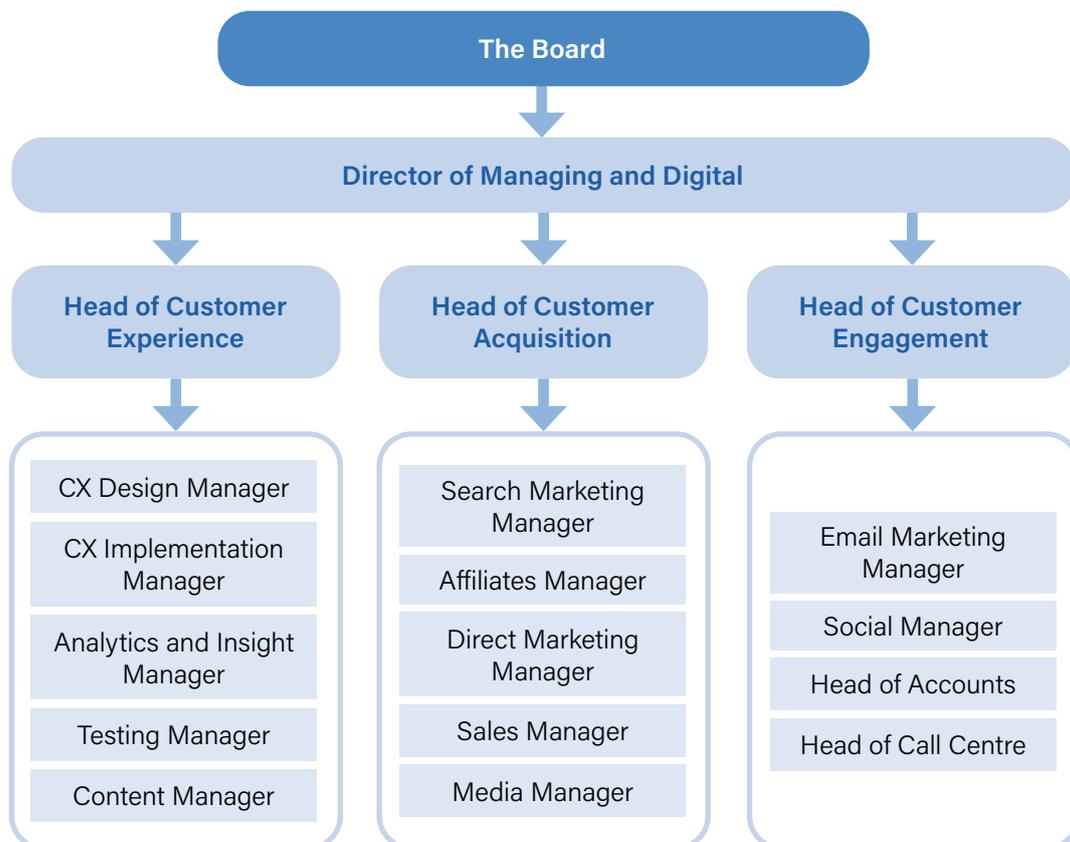
The outcomes of your marketing activities and the conclusions made in the review must be documented and communicated to relevant personnel.

Reporting requirements in organisations vary, and you will need to select an appropriate report format and length according to the requirements of your organisation. Before compiling your report, consider:

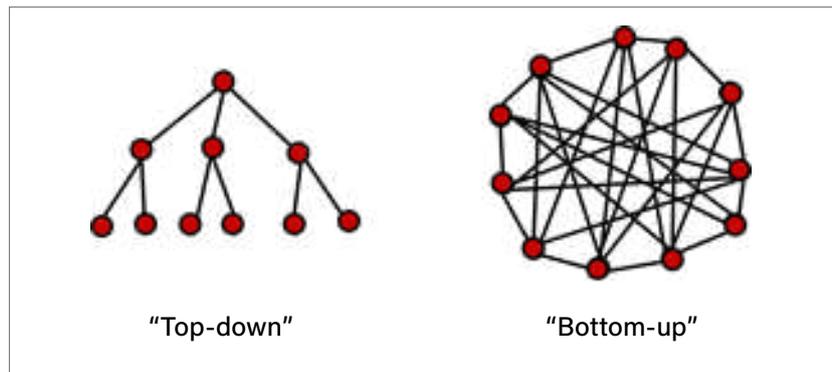
- what you are trying to achieve
- who will be reading or receiving the report.

The person or people you report to depends on the organisational structure. Large organisations with a formal hierarchical structure are more likely to have formal reporting procedures.

Example of a hierarchical organisation:



Small businesses and entrepreneurial organisations often operate within so-called flat structures and have self-managed teams. Reporting lines in such companies are not strictly defined and the requirements are more flexible. In these organisations, there can be little or no levels of middle management to report to.



Source: [organizationalphysics.com/2016/10/13/top-down-vs-bottom-up-hierarchy-or-how-to-build-a-self-managed-organization](http://organizationalphysics.com/2016/10/13/top-down-vs-bottom-up-hierarchy-or-how-to-build-a-self-managed-organization)

Depending on your organisation's structure and your job role, you may need to report your findings on marketing activities to:

- your manager or team leader
- marketing team
- sales team
- senior management
- board of directors
- external stakeholders, such as suppliers or contractors

When preparing your report or presentation of findings, always consider the audience.

## Preparing a marketing report

**A marketing report is a collection of data from different marketing sources.**

You will be required to prepare a marketing report and present the outcomes of the organisation's marketing activities. Remember that your report will help senior managers make sound marketing decisions for the future.

Make sure you include all relevant information and make the report easy to follow.

A marketing activity report should contain an overview of all marketing activities over a period of time, list specific assignments or tasks completed, and clearly show how they are aligned to the marketing plan.

## Supporting your claims with evidence

Effective marketing reports provide all the data required to make decisions and take action; however, this does not mean you need to include everything. Include the data and analysis that is relevant, factual, clear and easy to follow.

Provide the readers with evidence of the outcomes of marketing activities and explain how it was obtained.

Support your points with illustrations as well as evidence. Visual aids are effective in communicating numerical information, such as a percentage of market share, consumer satisfaction fluctuations, or a change in brand awareness. To make your report more impactful, consider the effective use of:

- graphs
- charts
- diagrams
- visuals (photos, product images, etc.)

## Structuring your report

It is recommended that you follow this general structure for a business report:

<b>Title page</b>	<ul style="list-style-type: none"> <li>• A title describing what the report is about</li> <li>• Your name and job title</li> <li>• Date of the report</li> </ul>
<b>Summary</b>	<ul style="list-style-type: none"> <li>• If your report is reasonably short, write a summary of the key points. If a report is long, only capture the key findings within the summary. Don't confuse the executive summary with the introduction. They serve quite different purposes.</li> </ul>
<b>Table of contents</b>	<ul style="list-style-type: none"> <li>• A table of contents makes it easy to find information quickly.</li> </ul>
<b>Introduction</b>	<ul style="list-style-type: none"> <li>• Introduce the purpose and scope of the report and any relevant background information. Explain what you are going to cover and what is outside the report's scope.</li> </ul>
<b>Body</b>	<ul style="list-style-type: none"> <li>• This is the main section of the report and should outline the marketing activities that were undertaken according to the marketing plan, how you measured their success, and which methods or sources you used.</li> <li>• Remember to cover all key points.</li> <li>• Break the body of the report into sub-sections using subheadings.</li> <li>• Include charts and visuals where possible and label them clearly.</li> </ul>

<b>Conclusions</b>	<ul style="list-style-type: none"> <li>▪ This is a closing section and may be written as a final summary of the findings or to present recommendations.</li> <li>▪ Remember that your conclusion should not introduce any new information. It should only draw from the information already presented, and present, for example, the most effective activities or most important lessons for the future.</li> </ul>
<b>References</b>	<ul style="list-style-type: none"> <li>▪ Remember to include a reference list of all sources used, for example, industry reports.</li> </ul>
<b>Appendices</b>	<ul style="list-style-type: none"> <li>▪ Include all supporting material that was too detailed to be included in the main body of the report.</li> </ul>

## Presentation

In some cases, you may be asked to present your report as an oral presentation. The most common format for a marketing presentation uses a slide format such as PowerPoint to structure the presentation.

The benefits of a PowerPoint presentation:

- Compared to reading a written report, it is easier to keep the audience's attention because communication takes place during a set time period.
- A presentation is a more concise version of a written report and should include more visual content such as graphs and charts.
- Video demonstrations can be integrated to illustrate marketing activities, for example, internet advertising or social media engagement.
- They provide an opportunity for questions and discussion.
- The presentation style can be easily adjusted to different work groups.

## Sharing reports with relevant personnel

As with any business report, your report of marketing activities can be shared using a range of formats and communication channels.

Sometimes a hardcopy (paper-based) report format may be preferred – for example, if information is sensitive and there is a high risk of a confidentiality breach. This usually applies to high-level marketing strategy plans.

Most reports, however, are produced and distributed electronically. For confidentiality purposes, access to the report can be password protected and the text converted to a pdf to prevent unauthorised use.

There are many digital file-sharing tools you can use for this purpose:

### Some examples of digital file-sharing tools

- Microsoft Office 365 SharePoint is a web-based collaborative platform that can be used as a document management and storage system.
- Microsoft OneDrive allows users to store and share files across Android, Windows, iOS mobile devices and macOS computers.
- Dropbox is a file hosting service that offers cloud storage and file sharing.
- Wetransfer.com is an online file transfer service that allows you to send large files (up to 2GB) for free.

To find more new online collaboration tools, visit: [aspirelr.link/tech-radar-collaboration-tools](https://aspirelr.link/tech-radar-collaboration-tools)

### Example

#### Preparing a report of marketing activities

Anne is a marketing officer in a global company selling office equipment, Office Box. All marketing campaigns are funded with the approval of the head office in Germany, and the outcomes are required to be reported internationally to inform other branches of successful marketing strategies, as well as to encourage ideas for improvement.

Anne has collated all the information she needs for her report. Although English is the company's working language, the report will be distributed throughout Oceania and Asia where English is not the first language of most employees. To illustrate the measurements of outcomes of marketing activities, Anne decides to include many charts to show how customers' perceptions are changing for the better and their preferences for product features.

After completing her report, she shares the document as a pdf in SharePoint to make it accessible for all teams. Anne also schedules a virtual presentation on Microsoft Teams to discuss the findings with other marketing teams.

## Practice Task 9

### Question 1

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Which of the following statements relate to reporting marketing activities? Tick all that apply.

- Collecting data from market sources
- Developing reporting procedures
- Overviewing all marketing activities
- Supplying information for decision making
- Including all information collected

### Question 2

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Number each step from 1 to 6 in the order you would follow to write a marketing activity review report

- Conclusions
- Appendices
- Executive summary
- The body (main section)
- Introduction
- References

## Question 3

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Give one example of a digital tool you could use to share report files.

## Summary

- Measuring the outcomes of marketing activities allows you to identify which marketing strategies were effective and what might be areas for improvement. To measure the effectiveness of marketing activities, the units and methods for measurement need to be determined.
- The most common things to measure include sales and profit, customer loyalty, brand awareness, promotional effectiveness and the success of other marketing mix elements.
- Measurement methods can be qualitative and quantitative. Qualitative data shows intangibles such as customer experience, and quantitative data gives information on something that can be counted or measured.
- Measurement of sales profit, market share, brand awareness and media effectiveness are quantitative.
- Measurement of customer perceptions, customer experience or value are qualitative and are not expressed by numerical values.
- Digital technology can be effectively used to measure outcomes of certain kinds of marketing activities.
- All findings relating to the effectiveness of marketing activities have to be recorded and compared to the activities and goals in the marketing plan.
- Variance analysis is used to compare actual and expected outcomes.
- Reviewing the results helps the organisation's decision makers to understand what worked and what didn't, and to make decisions for the next marketing plan. All results must be documented and communicated to relevant personnel.
- Results of marketing activities can be reported in a written format or presentation. The format and distribution of reports will depend on the organisation's policies or procedures.

## Learning Checkpoint 3

### Review marketing activities

#### Part A

1. Which of the following statements relate to measuring outcomes of marketing activities? Tick all that apply.

- Satisfaction of marketing personnel
- Sales performance in volume or sales units
- Customer loyalty in the number of repeat customers
- Profiling of the target market
- Website traffic by the number of hits

2. Give one example of a format you might use to record the measured outcome against the marketing plan.

3. Conduct a simple variance analysis using the following data:

- The budget for sales promotion \$10,000
- Actual sales \$8,000

## Part B

Read the case study and answer the questions that follow.

### Case study

Alana works as a marketing assistant for a local business, Healthy Bite, that manufactures organic, low-calorie snacks. She assists her marketing team to implement marketing activities, including promotional campaigns and changes in pricing strategy as part of the marketing mix.

The promotional objective of the latest campaign was to persuade customers to try their new home delivery service. To contribute to the success of the campaign, the company decided to use penetration pricing for their star product, Happy Bite. The desired outcome was to sell 100 more units per week at the lower price during the promotional period.

Alana was assigned the task of recording the outcomes, reviewing the results and preparing a report for her manager Rob. Alana collected the data from the marketing activities, and found that some of it is conflicting. She is not sure how she should interpret it and decides to seek assistance from Rob.

1. List one way Alana could measure the effectiveness of their approach with respect to their promotional objective.

2. Give one example of how Alana could review the results of the penetration pricing strategy.

The results indicate that only 50 more units per week were sold during the promotional period. However, the data from customer surveys suggest that brand awareness among customers has increased significantly. Even more customers identified Healthy Bite as their preferred brand. Alana is confused and wants to speak to Rob about what these findings mean.

3. Suggest two questions she could ask Rob to help to understand the problem.

Alana has clarified the results of the marketing activities and completed her report. Rob has asked her to share the report with the team. The company has an environmental policy, which requires employees to minimise the use of paper-based communication where possible.

4. How could Alana share the report with her team and suppliers? Propose two methods.

