**LEARNER GUIDE**

**Identify and use marketing resources to meet objectives**

Unit Standard 252197

Level 4 Credits 4

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PERSONAL INFORMATION

|  |  |
| --- | --- |
| **NAME** |  |
| **CONTACT ADDRESS** |  |
|  |
| **Code** |  |
| **Telephone (H)** |  |
| **Telephone (W)** |  |
| **Cellular** |  |
| **Learner Number** |  |
| **Identity Number** |  |
|  | |
| **EMPLOYER** |  |
| **EMPLOYER CONTACT ADDRESS** |  |
|  |
| **Code** |  |
| **Supervisor Name** |  |
| **Supervisor Contact Address** |  |
|  |
| **Code** |  |
| **Telephone (H)** |  |
| **Telephone (W)** |  |
| **Cellular** |  |

INTRODUCTION

#### Welcome to the learning programme

Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take notes and share information with your colleagues. Important and relevant information and skills are transferred by sharing!



This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you!

Structure

### Programme methodology



The programme methodology includes facilitator presentations, readings, individual activities, group discussions and skill application exercises.

Know what you want to get out of the programme from the beginning and start applying your new skills immediately. Participate as much as possible so that the learning will be interactive and stimulating.

The following principles were applied in designing the course:

* Because the course is designed to maximise interactive learning, you are encouraged and required to participate fully during the group exercises
* As a learner you will be presented with numerous problems and will be required to fully apply your mind to finding solutions to problems before being presented with the course presenter’s solutions to the problems
* Through participation and interaction the learners can learn as much from each other as they do from the course presenter
* Although learners attending the course may have varied degrees of experience in the subject matter, the course is designed to ensure that all delegates complete the course with the same level of understanding
* Because reflection forms an important component of adult learning, some learning resources will be followed by a self-assessment which is designed so that the learner will reflect on the material just completed.

This approach to course construction will ensure that learners first apply their minds to finding solutions to problems before the answers are provided, which will then maximise the learning process which is further strengthened by reflecting on the material covered by means of the self-assessments.

#### Different role players in delivery process

* Learner
* Facilitator
* Assessor
* Moderator

### What Learning Material you should have

This learning material has also been designed to provide the learner with a comprehensive reference guide.

It is important that you take responsibility for your own learning process; this includes taking care of your learner material. You should at all times have the following material with you:

|  |  |
| --- | --- |
| **Learner Guide** | **This learner guide is your valuable possession:**  This is your textbook and reference material, which provides you with all the information you will require to meet the exit level outcomes.  During contact sessions, your facilitator will use this guide and will facilitate the learning process. During contact sessions a variety of activities will assist you to gain knowledge and skills.  Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take and share information with your colleagues. Important and relevant information and skills are transferred by sharing!  This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you! |
| **Formative Assessment Workbook** | The Formative Assessment Workbook supports the Learner Guide and assists you in applying what you have learnt.  The formative assessment workbook contains classroom activities that you have to complete in the classroom, during contact sessions either in groups or individually.  You are required to complete all activities in the Formative Assessment Workbook.  The facilitator will assist, lead and coach you through the process.  These activities ensure that you understand the content of the material and that you get an opportunity to test your understanding. |

### Different types of activities you can expect

To accommodate your learning preferences, a variety of different types of activities are included in the formative and summative assessments. They will assist you to achieve the outcomes (correct results) and should guide you through the learning process, making learning a positive and pleasant experience.



The table below provides you with more information related to the types of activities.

| **Types of Activities** | **Description** | **Purpose** |
| --- | --- | --- |
| **Knowledge Activities** | You are required to complete these activities on your own. | These activities normally test your understanding and ability to apply the information. |
| **Skills Application Activities** | You need to complete these activities in the workplace | These activities require you to apply the knowledge and skills gained in the workplace |
| **Natural Occurring Evidence** | You need to collect information and samples of documents from the workplace. | These activities ensure you get the opportunity to learn from experts in the industry.  Collecting examples demonstrates how to implement knowledge and skills in a practical way |

### Learner Administration



#### Attendance Register

You are required to sign the Attendance Register every day you attend training sessions facilitated by a facilitator.

#### Programme Evaluation Form

On completion you will be supplied with a “Learning programme Evaluation Form”. You are required to evaluate your experience in attending the programme.

Please complete the form at the end of the programme, as this will assist us in improving our service and programme material. Your assistance is highly appreciated.

### Assessments

The only way to establish whether a learner is competent and has accomplished the specific outcomes is through the assessment process. Assessment involves collecting and interpreting evidence about the learners’ ability to perform a task.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

This programme has been aligned to registered unit standards. You will be assessed against the outcomes as stipulated in the unit standard by completing assessments and by compiling a portfolio of evidence that provides proof of your ability to apply the learning to your work situation.



**How will Assessments commence?**

#### Formative Assessments

The assessment process is easy to follow. You will be guided by the Facilitator. Your responsibility is to complete all the activities in the Formative Assessment Workbook and submit it to your facilitator.

#### Summative Assessments

You will be required to complete a series of summative assessments. The Summative Assessment Guide will assist you in identifying the evidence required for final assessment purposes. You will be required to complete these activities on your own time, using real life projects in your workplace or business environment in preparing evidence for your Portfolio of Evidence. Your Facilitator will provide more details in this regard.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

### Learner Support

The responsibility of learning rests with you, so be proactive and ask questions and seek assistance and help from your facilitator, if required.



Please remember that this Skills Programme is based on outcomes based education principles which implies the following:

* You are responsible for your own learning – make sure you manage your study, research and workplace time effectively.
* Learning activities are learner driven – make sure you use the Learner Guide and Formative Assessment Workbook in the manner intended, and are familiar with the workplace requirements.
* The Facilitator is there to reasonably assist you during contact, practical and workplace time for this programme – make sure that you have his/her contact details.
* You are responsible for the safekeeping of your completed Formative Assessment Workbook and Workplace Guide
* If you need assistance please contact your facilitator who will gladly assist you.
* If you have any special needs please inform the facilitator

### Learner Expectations

Please prepare the following information. You will then be asked to introduce yourself to the instructor as well as your fellow learners



|  |
| --- |
| Your name: |
|  |
|  |
| The organisation you represent: |
|  |
|  |
| Your position in organisation: |
|  |
|  |
| What do you hope to achieve by attending this course / what are your course expectations? |
|  |
|  |
|  |
|  |
|  |

# UNIT STANDARD 252197

#### Unit Standard Title

Identify and use marketing resources to meet objectives

#### NQF Level

4

#### Credits

3

#### Purpose

The person credited with this unit standard will be able to demonstrate an understanding of marketing objectives and resources while identifying the marketing resources needed. They will also be able to use marketing resources to meet objectives and account for the marketing resources.

The qualifying learner is capable of:

* Demonstrating an understanding of marketing objectives and resources.
* Identifying and assessing the marketing resources required for a marketing activity.
* Using marketing resources in meeting objectives.
* Accounting for marketing resources.

#### Learning Assumed To Be In Place And Recognition Of Prior Learning

Learners accessing this unit standard will have demonstrated competence in:

* Communication at NQF Level 3 or equivalent.
* Mathematical Literacy at NQF Level 3 or equivalent.

#### Unit Standard Range

* Marketing resources including people, time, capital, physical objects, buildings, space, expertise.
* Marketing including all forms of marketing communications direct marketing and relationship marketing, sponsorship, event marketing, sales promotions, public relations and alternative strategies.
* Media will include all electronic, print, outdoor, digital media, e-media and direct media.
* Marketing activities include but not limited to marketing campaigns across any medium or range of media using any form of marketing.

#### Specific Outcomes and Assessment Criteria:

**Specific Outcome 1**

Demonstrate an understanding of marketing objectives and resources.

**Assessment Criteria**

* The purpose of marketing objectives is explained in general terms.
* The testing of the validity of objectives is explained using the SMART method.
* The difference between tangible and intangible resources is explained through the categorisation of various resources.

**Specific Outcome 2**

Identify and assess the marketing resources required for a marketing activity.

**Assessment Criteria**

* The objectives of a marketing activity are identified based on marketing plan.
* The resources required to complete the marketing activity and meet its objectives are identified.
* Marketing resources are assessed and the correct quantities for each task are established.
* The required resources are obtained from existing internal supplies and/or ordered from external suppliers according to organisational policy and within agreed time frames.
* Contingency plans are established to ensure prompt remedial action can be taken in the event of unforeseen resource shortages.

**Specific Outcome 3**

Use marketing resources in meeting objectives.

**Assessment Criteria**

* Resources are obtained so as to be ready when needed to ensure smooth flow of marketing activities.
* Marketing resources are used optimally to avoid wastage and ensure full capacity.
* Resources are allocated to ensure that timing schedules and deadline dates are met.
* Contingency plans are implemented to ensure that marketing activity deadlines are met.

**Specific Outcome 4**

Account for marketing resources.

**Assessment Criteria**

* Used resources are documented according to organisational format and requirements.
* Unused resources are documented and their location specified in the organisation's required format.
* Surplus resources are stored in a required location.

#### Unit Standard Accreditation And Moderation Options

* An individual wishing to be assessed (including through RPL) against this unit standard may apply to an assessment agency, assessor or provider institution accredited by the relevant ETQA.
* Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
* Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.
* Moderation of assessment will be conducted by the relevant ETQA at its discretion.

#### Unit Standard Essential Embedded Knowledge

* Available marketing resources and their uses.
* Accounting processes and procedures related to resources.

#### Critical Cross-field Outcomes (CCFO):

**Unit Standard CCFO Identifying**

Identify and solve problems pertaining to marketing resources and their usage and allocation.

**Unit Standard CCFO Working**

Work effectively with others in the utilisation and allocation of marketing resources.

**Unit Standard CCFO Organising**

Organise oneself and one's activities to account for and utilise marketing resources effectively.

**Unit Standard CCFO Collecting**

Collect, evaluate, organise and critically evaluate information pertaining to the allocation, use and accounting of resources.

# MARKETING OBJECTIVES AND RESOURCES

#### ***Specific Outcome 1***

Demonstrate an understanding of marketing objectives and resources.

#### ***Assessment Criteria***

* The purpose of marketing objectives is explained in general terms.
* The testing of the validity of objectives is explained using the SMART method.
* The difference between tangible and intangible resources is explained through the categorisation of various resources.

## Marketing objectives

Objectives set out what the business is trying to achieve. Objectives can be set at two levels:

### Corporate level

These are objectives that concern the business or organisation as a whole. Examples of “corporate objectives might include:

* We aim for a return on investment of at least 15%
* We aim to achieve an operating profit of over R10 million on sales of at least R100 million
* We aim to increase earnings per share by at least 10% every year for the foreseeable future

### Functional level

For e.g. specific objectives for marketing activities; Examples of functional marketing objectives” might include:

* We aim to build customer database of at least 250,000 households within the next 12 months
* We aim to achieve a market share of 10%
* We aim to achieve 75% customer awareness of our brand in our target markets

Both corporate and functional objectives need to conform to the commonly used SMART criteria.

The SMART criteria (an important concept which you should try to remember and apply in the professional environment) are summarised below:

Specific - the objective should state exactly what is to be achieved. Be precise about what you are going to achieve.

Measurable - an objective should be capable of measurement – so that it is possible to determine whether (or how far) it has been achieved. Quantify your objectives.

Achievable - the objective should be realistic given the circumstances in which it is set and the resources available to the business. Are you attempting too much?

Relevant - objectives should be relevant to the people responsible for achieving them. Do you have the resources to make the objective happen (men, money, machines, materials, and minutes)?

Time Bound - objectives should be set with a time-frame in mind. These deadlines also need to be realistic.

### How do you make objectives SMART?

SMART objectives are simple and quick to learn. The objective is the starting point of the marketing plan.

Once environmental analyses (such as SWOT, Five Forces Analysis, and PEST) and marketing audit have been conducted, their results will inform SMART objectives.

SMART objectives should seek to answer the question 'where do we want to go?’

The purposes of SMART objectives include:

* To enable a company to control its marketing plan
* To help to motivate individuals and teams to reach a common goal
* To provide an agreed, consistent focus for all functions of an organisation
* All objectives should be SMART i.e. Specific, Measurable, Achievable, Realistic, and Timed.

Some examples of SMART objectives follow:

#### 1. Profitability Objectives

To achieve a 20% return on capital employed by August 2019.

#### 2. Market Share Objectives

To gain 25% of the market for sports shoes by September 2018

#### 3. Promotional Objectives

To increase awareness of the dangers of AIDS in South Africa from 22% to 35% by June 2017; to increase trail of X washing powder from 2% to 5% of our target group by January 2019.

#### 4. Objectives for Survival

To survive the current double-dip recession

#### 5. Objectives for Growth

To increase the size of our Brazilian operation from $200,000 in 2017 to $400,000 in 2018.

#### 6. Objectives for Branding

To make Y brand of bottled beer the preferred brand of 21-28 year old females in North America by February 2017.

There are many examples of SMART objectives. Be careful not to confuse objectives with goals and aims.

Goals and aims tend to be vaguer and focus on the longer-term.

They will not be SMART. However, many SMART objectives start off as aims or goals and therefore they are of equal importance.



### Tangible and intangible resources

Infrastructure plays a very important role in the process of regional inversion.

It provides a platform upon which the phenomena supporting regional inversion depend.

Tangible or physical infrastructure comprises the facilities through which communication, learning and transactions occur.

Tangible infrastructure is therefore an essential medium that allows the various phenomena connected to regional inversion to unfold.

Put another way, tangible infrastructure is the “hardware” that supports the intangibles of regional inversion.

The intangible infrastructure comprises the knowledge and transaction networks in all their social, economic and cultural dimensions.

The intangible infrastructure is both fluid and dynamic. It builds on access made possible by the tangible infrastructure, allowing individuals, groups and organisations to establish or develop relations.

The values and relations enabled by the intangible infrastructure are at the core of community building, and they are of vital importance to regional inversion.

Tangible assets are defined as those monetary assets that can seen, touched or physically measured. For example a computer is a tangible asset.

Intangible assets are the assets which cannot be seen, touched or physically touched or measured.

There are two types of intangible assets, 1-legal intangibles (company list ) 2-competitive intangibles (knowledge activities) etc

# MARKETING RESOURCES FOR MARKETING ACTIVITIES

#### ***Specific Outcome 2***

Identify and assess the marketing resources required for a marketing activity.

#### ***Assessment Criteria***

* The objectives of a marketing activity are identified based on marketing plan.
* The resources required to complete the marketing activity and meet its objectives are identified.
* Marketing resources are assessed and the correct quantities for each task are established.
* The required resources are obtained from existing internal supplies and/or ordered from external suppliers according to organisational policy and within agreed time frames.
* Contingency plans are established to ensure prompt remedial action can be taken in the event of unforeseen resource shortages.

## Marketing resources required for a marketing activity

As with any other activity in business, marketing requires a set of resources in order to complete the marketing activities, in order to achieve the objectives and goals set out for the department.

After identifying the business needs of the company and the most profitable market segments that could achieve the desired results, the next step is to determine the marketing resources needed to effectively reach the targeted audiences.

Different consumer segments responds to different marketing approaches. The wrong method or wrong message can prove to be counterproductive.

The most effective marketing methods or techniques are defined in terms of unique characteristics of the targeted market segments.

Each market segment is motivated by a specific set of needs to purchase products and services.

Lists of market segments, distribution channels and marketing techniques are useless without understanding what is important to the consumer.

You need to be very clear about what needs motivate market segments to seek certain products and services.

Let’s assume that the marketing strategy of a hotel is to build weekend business by attracting sightseeing groups as well as sports clubs and teams.

One of the marketing methods used to activate this strategy would be to reach travel retailers and wholesalers who book accommodations for these market segments.

The intermediaries, however, are motivated by a very different set of needs than the clients they serve. Understanding their unique needs will help create the most effective marketing messages for them. The diagram below lists motivational factors that are important to eliciting effective responses to marketing efforts directed to travel retailers and wholesalers.

|  |  |
| --- | --- |
| **What Travel Retailers Want** | |
| **Motivation and Response Keys** | Quick commission payment |
| Client satisfaction |
| Volume packages |
| Special recognition with free trips |
| High margin on sales |
| Adequate range it items |
| **What Travel Wholesalers Want** | |
| **Motivation and Response Keys** | High sales volume |
| High margin on sales |
| Supplier reliability |
| Variety in products/services |
| Low risk/high retailer response |

### Objectives of marketing according to the plan

Marketing plans are vital to marketing success. They help to focus the mind of companies and marketing teams on the process of marketing i.e. what is going to be achieved and how we intend to do it.

There are many approaches to marketing plans. We have focussed upon the key stages of the plan. It is contained under the popular acronym AOSTC.

***ANALYSIS***

***OBJECTIVES***

***STRATEGIES***

***TACTICS***

***CONTROLS***

**Stage One - Situation Analysis (and Marketing Audit)**

* Marketing environment
* Laws and regulations
* Politics
* The current state of technology
* Economic conditions
* Socio-cultural aspects
* Demand trends
* Media availability
* Stakeholder interests
* Marketing plans and campaigns of competitors
* Internal factors such as your own experience and resource availability.

**Stage Two - Set marketing objectives.**

SMART objectives:

* Specific - Be precise about what you are going to achieve.
* Measurable - Quantify you objectives.
* Achievable - Are you attempting too much?
* Realistic - Do you have the resource to make the objective happen (men, money, machines, materials, minutes)?
* Timed - State when you will achieve the objective (within a month? By February 2010?)

If you don't make your objective SMART, it will be too vague and will not be realized. Remember that the rest of the plan hinges on the objective. If it is not correct, the plan may fail.

**Stage Three - Describe your target market**

* Which segment? How will we target the segment? How should we position within the segment?
* Why this segment and not a different one? (This will focus the mind).
* Define the segment in terms of demographics and lifestyle. Show how you intend to 'position' your product or service within that segment. Use other tools to assist in strategic marketing decisions such as Boston Matrix, Ansoff's Matrix, Bowman’s Strategy Clock, Porter's Competitive Strategies, etc.

**Stage Four - Marketing Tactics**

Convert the strategy into the marketing mix (also known as the 4Ps). These are your marketing tactics.

#### Price

Will you cost plus, skim, match the competition or penetrate the market?

#### Place

Will you market direct, use agents or distributors, etc?

#### Product

Sold individually, as part of a bundle, in bulk, etc?

#### Promotion

Which media will you use? e.g. sponsorship, radio advertising, sales force, point-of-sale, etc? Think of the mix elements as the ingredients of a 'cake mix'. You have eggs, milk, butter, and flour. However, if you alter the amount of each ingredient, you will influence the type of cake that you finish with.

**Stage Five - Marketing Controls**

* Remember that there is no planning without control. Control is vital
* Start-up costs
* Monthly budgets
* Sales figure
* Market share data
* Consider the cycle of control

Finally, write a short summary (or synopsis) which is placed at the front of the plan. This will help others to get acquainted with the plan without having to spend time reading it all. Place all supporting information into an appendix at the back of the plan.

**PART TWO – THE RESOURCES**

Once you have completed the marketing plan, you need to identify the resources which you will require to complete the marketing effort. Remember to list both the tangible and intangible resources which you may require to make use of.

In the identification of your resources, you also require to identify the quantities thereof, as well as the suppliers of these resources. It would be best to draw up a list of resources, then possible suppliers, costs thereof as well as an indication of their intended uses.

Once you have completed both parts of the project, you need to present it to the class, as they will be your clients. Attach the final version to this unit standard as part of your portfolio of evidence.

# USING MARKETING RESOURCES TO MEET OBJECTIVES

#### ***Specific Outcome 3***

Use marketing resources in meeting objectives.

#### ***Assessment Criteria***

* Resources are obtained so as to be ready when needed to ensure smooth flow of marketing activities.
* Marketing resources are used optimally to avoid wastage and ensure full capacity.
* Resources are allocated to ensure that timing schedules and deadline dates are met.
* Contingency plans are implemented to ensure that marketing activity deadlines are met.

## Using the identified resources

# ACCOUNT FOR MARKETING RESOURCES

#### ***Specific Outcome 4***

Account for marketing resources.

#### ***Assessment Criteria***

* Used resources are documented according to organisational format and requirements.
* Unused resources are documented and their location specified in the organisation's required format.
* Surplus resources are stored in a required location.

## Accounting for resources

As with any other item within the organisation, marketing resources must be accounted for. As explained earlier, resources are cost intensive and must be accounted for at all times.

If you have, for instance, identified the need for two large televisions so that the marketers can view the product of their marketing campaign regularly, then these televisions should be in a place where the staff is able to use them.

Usually, such televisions will be placed in a boardroom or a large meeting area where they are visible to everyone who is part of the project. By placing the large televisions in a store room and keeping them locked up there, they will not serve their purpose.

They will be safe, yes, but of no use to the staff, so the reasons for purchasing them will be not be fulfilled.

That being said, you cannot exactly just leave them in the passage and allow any person to use them where and when they deem necessary. They will not be safe, as they will not be accounted for.

You should rather mount them to the walls in the meeting area where they are safe, and where they can be used for the reason they were purchased.

As with any other item on the organisations’ fixed resource list, all resources must be accounted for and checked on a regular basis. This serves to ensure that the resources are used correctly as well as guarantees their safety within the organisation.

A simple resource list will help the organisation to track all its resources and ensure that these are accounted for at all times.

There may be situations where a resource is purchase with the intent of using is in multiple departments within the organisation; it makes sense to rather share a resource which is used occasionally by two departments, rather than buying one for each department.

In this case, these resources must be tracked at all times and must be accounted for by one allocated person within each of the departments they are used in.