BSBMKG411A Analyse direct marketing databases

Revision Number: 1

BSBMKG411A Analyse direct marketing databases

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to collect, enhance, cleanse and analyse and utilise data for marketing purposes.
	No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals in entry level marketing roles who collect, analyse and store data such as customer or prospect lists, using databases in accordance with organisational procedures. Individuals undertaking these roles also analyse data to segment and profile prospective or existing customers, or to identify new direct marketing opportunities, prior to direct marketing offers being sent.
	Technical aspects in relation to designing, creating and generating reports from databases are covered in BSBITA401A Design databases.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Collect data	1.1. Determine purpose for acquiring data 1.2. Identify and analyse data requirements 1.3. Evaluate and select appropriate ***database system*** or database management service 1.4. Use ***appropriate methods*** to collect data or source data from external providers on prospects 1.5. Input and store data accurately, in accordance with organisational procedures and ***legal and ethical requirements***
2. Enhance, cleanse and update data	2.1. Retrieve data in accordance with organisational requirements 2.2. Check list against 'Do not call', 'Do not mail' register 2.3. Remove duplication from database 2.4. Regularly ***cleanse and update*** data files to maintain accuracy 2.5. Determine whether to outsource data enhancing to third party services
3. Analyse and use data for direct marketing purposes	3.1. Segment and profile data according to ***demographic***, ***psychographic and behaviouristic characteristics*** 3.2. Assess quality of data 3.3. Identify database fields with cross-selling and value-adding opportunities, and any changes in consumer behaviour 3.4. Use data analysis findings to design or test new direct marketing offers or for other direct marketing purposes 3.5. Modify and enhance existing direct marketing offers or other marketing activities in accordance with analysis findings

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- information management skills to store, record, retrieve and update customer information in direct marketing databases
- numeracy skills to perform calculations on customer list data
- organisational and time management skills to sequence tasks and to meet time lines
- research and data collection skills to obtain lists and customer information
- technology skills to use a range of office equipment such as telephone systems and computers; and to use a range of software (spreadsheets, word processing packages, databases).

Required knowledge

- key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations, such as:
  - Australian Direct Marketing Association (ADMA) Direct Marketing Code of Conduct and 'Do Not Mail' and 'Do Not Call' service register
  - privacylaws
  - Trade Practices Act
- organisational policies, procedures, products, services and structure
- principles and techniques for recording, filing, and cataloguing data
- range of database software applications used in direct marketing.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • collecting, storing and accurately maintaining customer or prospect data used in a direct marketing campaign • segmenting and profiling customer data according to specified characteristics • analysing data to identify direct marketing opportunities and quality of data • using data to design or modify new or existing marketing activities • knowledge of relevant legislation, codes and standards.
Context of and specific resources for assessment	Assessment must ensure: • access to existing client lists and databases • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on data analysis activities • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of analysis, segmentation and profiling results or identification of marketing opportunities extracted from data • observations of database cleansing, updating and enhancement • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for	Holistic assessment with other units relevant to the

EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended, for example:
	• BSBITU404AProduce complex desktop published documents
	• BSBMKG401BProfile the market
	• other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Database system may include:	• MS Access • MS Excel • in-house, custom built databases
Appropriate methods may include:	• acquisition of customer lists • business cards obtained from conferences, trade fairs and exhibitions • competition response forms • obtaining lists from list brokers • warranty forms

Legal and ethical requirements may include:	• codes of practice such as Australian Direct Marketing Association (ADMA) Code of Practice
	• cultural expectations and influences
	• ethical principles
	• relevant legislation such as:
	  • copyright
	  • privacy
	• policies and guidelines
	• regulations
	• social responsibilities
	• societal expectations

Cleansing and updating may include:	• dealing with dead letters • dealing with unsubscribes • logging contact and payment details changes • managing bounceback emails • removing duplication • return-to-sender letters
Demographic characteristics may include:	• age • date and place of birth • disability • education • first language

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RANGE STATEMENT	
	• gender • household income • Indigenous Australian • languages spoken at home • marital status • nationality • number and age of children • occupation
Psychographic characteristics may include:	• activities • affiliations • attitudes • interests • lifestyle • opinions • political views • values
Behavioristic characteristics may include:	• benefits sought by buyer • loyalty status of buyer • readiness stage of buyer • user status of buyer

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

Co-requisite units		