Australian Government

Department of Education, Employment and Workplace Relations

BSBMKG506B Plan market research

Revision Number: 1

ISC INDUSTRY SKILLS COUNCILS

Creating Australia's Future

BSBMKG506B Plan market research

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan market research by identifying market research needs, defining market research objectives, identifying data gathering approaches and developing a market research plan.
	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 a non market research organisation who conduct market research planning at a managerial level. While market research planning can be undertaken as part of a broader role, it does require a good general knowledge of market research principles and practices, and a detailed understanding of the organisation's operations, objectives and the application of market research.
	This unit applies to managers who allocate responsibility to team members who conduct market research, covered by BSBMKG408B Conduct market research.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

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. Identify market research needs	1.1. Communicate role of market research in enterprise operations to **relevant personnel** 1.2. Identify **contribution of market research** to enterprise activity 1.3. Analyse **enterprise planning and performance documentation** to determine **research needs** 1.4. Consult relevant personnel to determine research needs 1.5. Develop statement of market **research needs**
2. Define market research objectives	2.1. Draft research objectives 2.2. Undertake preliminary **project scoping** 2.3. Consult with relevant personnel on draft research objectives to ensure relevant and useful information is gathered 2.4. Review and finalise draft objectives in light of scoping parameters
3. Define data gathering approaches	3.1. Identify **types of data** required to inform objectives 3.2. Determine combinations of types of data to best inform objectives 3.3. Identify and evaluate suitable **data gathering methods** 3.4. Identify data sources 3.5. Quantify required data 3.6. Identify and evaluate suitable **data processing methods** 3.7. Make **decisions** in relation to data types, combinations, gathering methods, sources, quantities and processing methods
4. Develop market research plan	4.1. Estimate resources and time lines required for market research projects 4.2. Determine **feasibility of market research projects** 4.3. Prepare market research plan for approval 4.4. Obtain approval to implement plan from appropriate personnel as required

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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

- financial skills to set and manage market research budgets
- negotiation skills to gain approval for proposals from senior management
- organisational and time management skills to develop complex market research plans including time lines and options
- research and data collection skills to determine organisational market research requirements.

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:
  - anti-discrimination legislation and principles of equal opportunity, equity and diversity
  - ethical principles
  - marketing codes of practice and conduct such as the Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice
  - privacy laws
  - Trade Practices Act
- market research principles and practices including:
  - data processing methods and data analysis techniques
  - project design to meet given budgets and other resource constraints
  - design of samples
  - development and use of hypotheses
  - role of research in enterprise development
  - roles and uses of qualitative and quantitative research
  - use of survey instruments
- project planning principles and practices including for:
  - consultation and stakeholder involvement
  - development of time lines, budgets and other implementation plans
  - gaining of approvals
  - needs analyses
  - scoping practices
- statistical methods and techniques.

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: • identifying and defining market research requirements in an organisation • developing a documented market research plan describing the scope, objectives, time and budget for market research to be undertaken by an organisation.
Context of and specific resources for assessment	Assessment must ensure: • access to data and information records from previous marketing research activities • 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 documented market research planning activity reports and plans • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of communication with team members and senior management to refine market research planning activities • observation of presentations on market research plan • 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 assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other marketing units.

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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.	
Relevant personnel may include:	• clients • customers • enterprise owners • managers • supervisors • suppliers

Contribution of market research may include:	• best practice
	• information about competitors, clients, stakeholders
	• information to enable predictions for:
	  • marketing
	  • policy making
	  • service development and delivery
	  • strategic planning

Enterprise planning and performance documentation may include:	• correspondence • financial reports • information about sales and sales force performance • internal reports

Research needs may include:	• research on competition:
	  • comparing consumer attitudes to an organisation's services and those of competitors
	  • identifying frequency of use of competitors' products and services
	  • identifying key competitors and their strengths
	  • measuring awareness
	• research on consumers:
	  • developing detailed consumer profiles
	  • identifying changes in attitudes and behaviour patterns

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	• identifying existing, potential or lapsed consumers
	• research on place:
	   • identifying attitudes towards location
	   • identifying cooperative opportunities for distribution of information or services
	   • identifying demand for products or services at other locations
	• research on pricing:
	   • identifying attitudes towards prices
	   • identifying costs
	   • testing alternative pricing strategies
	• research on products and services:
	   • evaluating competitors' products
	   • evaluating consumer attitudes towards presentation and packaging
	   • identifying potential new products or services or ones which may be at the end of their life cycle
	   • measuring attitudes towards existing products or services
	• research on promotion:
	   • measuring advertising and promotion effectiveness
	   • testing alternative messages
	   • testing and comparing different media options

Project scoping may include:	• human, financial and physical resources required and available • need for external market research assistance • possible research locations • possible research methodologies • possible sample size and nature of sample • time required and available to conduct research
Types of data may include:	• formal or informal comments and other feedback from client, customers, staff and others • government statistics • industry planning information

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	• qualitative data • quantitative data • sales figures
Data gathering methods may include:	• case study investigation • focus groups • literature searches • mail surveys • one-on-one interviews in person or by telephone • personal observation of performance • structured or informal small group discussions • supervised or unsupervised completion of questionnaires or other survey tools by respondents • use of questionnaires and other tools by staff to record data about enterprise activities
Data processing methods may include:	• data processing service experts • manual or personal methods • packaged analysis routines or programs • specialist software packages
Decisions may include:	• choices achievable with available resources, and costs and benefits of choices • choices consistent with organisational policies and procedures • choices that will best satisfy the research objectives
Feasibility of market research projects may include:	• likely ease of implementing the recommendations • quality and credibility of the methodology • ultimate usefulness of the research • whether similarly valid results can be obtained by other means

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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