Business Services Training Package

BSB01

Volume 7 of 8

The contents of this volume refer only to the Endorsed Components
of BSB01 Business Services Training Package. This volume should not
be read in isolation but in the context of the Training Package as a whole
Please refer to the following page for details of other volumes in this Training Package.

This volume contains units of competency for
Advertising
Sales
Marketing

Preliminary Information

Important Note to Users

Training Packages are not static documents; they are amended periodically to reflect the latest industry practices and are version controlled. It is essential that the latest version is always used.

Check the version number before commencing training or assessment

This Training Package is Version 4 – check whether this is the latest version by going to the National Training Information Service (www.ntis.gov.au) and locating information about the Training Package. Alternatively, contact Innovation and Business Skills Australia (www.ibsa.org.au) to confirm the latest version number.

Explanation of version number conventions

The primary release Training Package is Version 1. When changes are made to a Training Package, sometimes the version number is changed and sometimes it is not, depending on the extent of the change. When a Training Package is reviewed it is considered to be a new Training Package for the purposes of version control, and is Version 1. Do not confuse the version number with the Training Package's national code (which remains the same during its period of endorsement).

Explanation of the review date

The review date (shown on the title page and in the footer of each page) indicates when the Training Package is expected to be reviewed in the light of changes such as changing technologies and circumstances. The Training Package review date is not an expiry date. Endorsed Training Packages and their components remain current until they are reviewed or replaced.

Version modification history

The version details of this endorsed Training Package are in the table below. The latest information is at the top of the table.

Version	Release Date	Comments
4	October 2004	**Fields and domains** Version 4 includes all the fields and domains in Version 3 plus: - a new field of International Services which includes the new domain of International Trade/Business, - an expanded Business Management Services field with two new domains of Occupational Health and Safety (OHS) and Compliance Management, and - an expanded Common Business field to include 1 new unit. In total Version 4 BSB01 contains eight fields and twenty-four domains. **Qualifications added to BSB01 in Version 4** Version 4 includes all the qualifications in Version 3 plus the following six new qualifications. BSB30803 Certificate III in Business (International Trade) BSB42003 Certificate IV in Business (International Trade) BSB41603 Certificate IV in Occupational Health and Safety BSB51903 Diploma in International Business BSB51603 Diploma of Occupational Health and Safety BSB61003 Advanced Diploma of Occupational Health and Safety **Qualification Guide amendments** The Qualification Guide has been amended to include the new qualifications.

Version	Release Date	Comments
		Units of competency This version includes all the units of competency provided in Version 3 plus the following additional fifty-seven new units of competency. BSBCMN421A Assist with compliance with OHS and other relevant laws BSBOHS401A Contribute to the implementation of a systematic approach to managing OHS BSBOHS402A Contribute to the implementation of the OHS consultation process BSBOHS403A Identify hazards and assess OHS risks BSBOHS404A Contribute to the implementation of strategies to control OHS risk BSBOHS405A Contribute to the implementation of emergency procedures BSBOHS406A Use equipment to conduct workplace monitoring BSBOHS501A Participate in the coordination and maintenance of a systematic approach to managing OHS BSBOHS502A Participate in the management of the OHS information and data systems BSBOHS503A Assist in the design and development of OHS participative arrangements BSBOHS504A Apply principles of OHS risk management BSBOHS505A Manage hazards in the work environment BSBOHS506A Monitor and facilitate the management of hazards associated with plant BSBOHS507A Facilitate the application of principles of occupational health to control OHS risk BSBOHS508A Participate in the investigation of incidents BSBOHS601A Develop a systematic approach to managing OHS BSBOHS602A Develop OHS information and data analysis and reporting and recording processes BSBOHS603A Analyse and evaluate OHS risk BSBOHS604A Apply ergonomic principles to control OHS risk BSBOHS605A Apply occupational hygiene principles to control OHS risk BSBOHS606A Develop and implement crisis management processes BSBOHS607A Advise on application of safe design principles to control OHS risk BSBOHS608A Conduct an OHS audit BSBOHS609A Evaluate an organisation's OHS performance BSBCOM401A Organise and monitor the operation of compliance management system BSBCOM402A Implement processes for the management of breaches in compliance requirements BSBCOM403A Promote and liaise on compliance requirements, systems and related issues BSBCOM501A Identify and interpret compliance requirements BSBCOM502A Evaluate and review compliance BSBCOM503A Develop processes for the management of breaches in compliance requirements BSBCOM504A Create a culture of compliance within an organisation BSBCOM601A Research compliance requirements and issues BSBCOM602A Develop and create compliance requirements BSBCOM603A Plan and establish compliance management systems BSBINT301A Apply knowledge of the international trade environment to complete work BSBINT302A Apply knowledge of legislation relevant to international trade to complete work BSBINT303A Organise the importing and exporting of goods BSBINT304A Assist in the international transfer of services BSBINT305A Prepare business documents for the international trade of goods BSBINT306A Apply knowledge of international finance and insurance to complete work requirements BSBINT401A Research international business opportunities BSBINT402A Market goods and services internationally BSBINT403A Research international markets BSBINT404A Implement international client relationship strategies BSBINT405A Apply knowledge of import and export international conventions, laws and finance BSBINT406A Promote compliance with legislation BSBINT407A Prepare business advice on export Free on Board Value BSBINT408A Prepare business advice on the taxes and duties for international trade transactions

Version	Release Date	Comments
		BSBINT409A Plan for international trade BSBINT501A Profile international markets BSBINT502A Analyse consumer behaviour for specific international markets BSBINT503A Analyse data from international markets BSBINT504A Forecast international market and business needs BSBINT505A Build international client relationships BSBINT506A Build international business networks BSBINT507A Report on finances related to international business BSBINT508A Promote products and services to international markets
3	**March 2004**	Version 3 of BSB01 Business Services Training Package included the seven fields and twelve domains developed in Phase One (see version 1 & 2 notes below) together with the extensions to fields, additional domains, new units of competency and new and replacement qualifications developed in Phase Two as described below. **Fields expanded in Phase Two** *Common Business* – expanded to incorporate units of competency under additional areas (business communication; generalist marketing; first aid; project management; risk management; customer service; diversity and knowledge management). *Business Administration Services* – expanded to incorporate units of competency and qualifications in two new domains – Purchasing and Medical Administration. *Business Management Services*– expanded to incorporate units of competency and qualifications in three new domains – Project Management, Franchising, Quality Auditing, and to provide additional Strategic Management units. *Human Resources Management* – expanded to incorporate units of competency and qualifications in two new domains – Unionism and Employment Services, and to provide additional Human Resources units. *Business Development* – expanded to incorporate additional units of competency for the Marketing domain. **Domains developed in Phase Two** Purchasing Medical Administration Project Management Franchising Unionism Employment Services Quality Auditing Frontline Management (review only) **Qualifications added to BSB01 in Phase Two** BSB30504 Certificate III in Business (Frontline Management) BSB30704 Certificate III in Business (Medical Administration) BSB41004 Certificate IV in Business (Frontline Management) BSB41404 Certificate IV in Business (Purchasing) BSB41504 Certificate IV in Project Management BSB41704 Certificate IV in Business (Franchising) BSB41804 Certificate IV in Unionism BSB41904 Certificate IV in Business (Employment Services) BSB51004 Diploma of Business (Frontline Management) BSB51404 Diploma of Business (Purchasing) BSB51504 Diploma of Project Management BSB51704 Diploma of Business (Franchising) BSB51804 Diploma of Unionism BSB51904 Diploma of Business (Quality Auditing) BSB60904 Advanced Diploma of Project Management **Deleted/replaced qualifications** The Frontline Management qualifications from BSB01 Versions 1 & 2 – BSB30501 Certificate III in Frontline Management, BSB41001 Certificate IV in Business (Frontline Management) and BSB51001 Diploma of Business (Frontline Management) are now replaced by new frontline qualifications at the same qualification as shown in the list above. **Qualifications Framework amendments** The Qualifications Framework has been amended to include the new qualifications, provide advice about replaced qualifications and provide specific packaging rules for three of the new qualifications – BSB41504 Certificate IV in Project Management, BSB51504 Diploma of Project Management, BSB60904 Advanced Diploma of Project Management – these have different rules and structure to the rest of the qualifications in BSB01.

Version	Release Date	Comments
		Deleted/replaced units of competency • BSBFLM302A Support leadership in the workplace (deleted) • BSBFLM304A Participate in work teams (deleted) Because of overlap these units were replaced with a new unit – BSBFLM312A Contribute to team effectiveness • BSBFLM402A Show leadership in the workplace (deleted) • BSBFLM404A Lead work teams (deleted) Because of overlap these units were replaced with a new unit – BSBFLM412A Promote team effectiveness • BSBFLM502A Provide leadership in the workplace (deleted) • BSBFLM504A Facilitate work teams (deleted) Because of overlap these units were replaced with a new unit – BSBFLM512A Ensure team effectiveness **Imported units of competency** The following units of competency included in this version were imported from other Training Packages THHGLE09B Manage workplace diversity CHCAD1C Advocate for clients CHCCS1B Deliver and monitor service to clients CHCCS401A Facilitate cooperative behaviour CHCES302A Work with government in a purchaser provider relationship CHCES304A Deliver recruitment services CHCES305A Monitor New Apprenticeships arrangements CHCES402A Deliver New Apprenticeship services CHCES301A Work in the Employment Services area CHCCAR501A Provide careers guidance CHCES303A Use labour market information CHCCM2C Establish and monitor a case plan CHCES406A Provide job search support CHCCM4B Promote high quality case management CHCORG29A Provide coaching and motivation CHCCS2C Deliver and develop client service CHCCD12C Apply a community development framework CHCCS3C Coordinate the provision of services and programs CHCCS402A Respond holistically to complex client issues CHCCS5B Identify and address specific client needs CHCCS405A Work effectively with culturally diverse clients and co-workers CHCES405A Monitor service performance in a purchaser provider relationship with government CHCDIS8B Support people with disabilities as workers CHCCS6B Assess and deliver services to clients with complex needs CHCDIS9B Maximise participation in work by people with disabilities CHCDIS18A Support students with special needs CHCES502A Research and report on labour market information CHCES401A Analyse and apply labour market information CHCCS4C Manage the delivery of quality client service CHCES403A Develop and monitor employment plans CHCDIS11B Coordinate disability work CHCES404A Promote clients to employers CHCES501A Manage service delivery in a purchaser-provider relationship with government CHCES501A Manage service delivery in a purchaser-provider relationship with government PSPGOV603A Develop a tender submission LGACOM409A Prepare tender documents PSPPROC602A Direct management of contracts PSPPROC702A Establish the procurement context
2	1 May 2002	**Addition of e-Business field** Version 2 added the new field of e-Business involving fifty-nine new units of competency and eight new qualifications to BSB01. The development of this field of BSB01 was part of the Phase One work but endorsed later than the bulk of Phase One development.

Version	Release Date	Comments
1	3 September 2001	**Fields covered by BSB01 Business Services Training Package Version 1** Version 1 reflected Phase One of the development of the Business Services Training Package (less e-Business field – see Version 2 note above) and included the following fields and domains. • Common Business • Business Administration Services • Business Information Services • Business Management Services • Human Resource Management • Business Development **Domains developed in Phase One:** • Specialist Administration • Legal Services • Recordkeeping • Frontline Management • Governance (Indigenous Organisations) • Small Business Management • Strategic Management • Human Resources • Assessment & Workplace Training (included as part of BSB01) • Advertising • Marketing • Sales

Summary of qualifications in BSB01 Business Services Training Package

All the Australian Qualifications Framework (AQF) qualifications in BSB01 are listed below.

CERTIFICATE I
BSB10101 Certificate I in Business

CERTIFICATE II
BSB20101 Certificate II in Business

CERTIFICATE III
BSB30101 Certificate III in Business
BSA30200 Certificate III in Business (Legal Administration)
BSB30201 Certificate III in Business Administration
BSB30301 Certificate III in Business (Sales)
BSB30401 Certificate III in Business (Recordkeeping)
BSB30503 Certificate III in Business (Frontline Management)
BSB30601 Certificate III in e-Business
BSB30703 Certificate III in Business (Medical Administration)
BSB30803 Certificate III in Business (International Trade)

CERTIFICATE IV
BSB40101 Certificate IV in Business
BSB40201 Certificate IV in Business Administration
BSB40301 Certificate IV in Business (Recordkeeping)
BSB40401 Certificate IV in Business (Small Business Management)
BSB40501 Certificate IV in Business Development
BSB40601 Certificate IV in Business (Advertising)
BSB40701 Certificate IV in Business (Marketing)
BSB40801 Certificate IV in Business (Human Resources)
BSB40901 Certificate IV in Business (Governance)
BSB41003 Certificate IV in Business (Frontline Management)
BSB41101 Certificate IV in Business Management
BSA40200 Certificate IV in Business (Legal Services)
BSB41201 Certificate IV in e-Business
BSB41301 Certificate IV in e-Business Development
BSB41403 Certificate IV in Business (Purchasing)
BSB41503 Certificate IV in Project Management
BSB41703 Certificate IV in Business (Franchising)
BSB41803 Certificate IV in Unionism
BSB41903 Certificate IV in Business (Employment Services)
BSB42003 Certificate IV in Business (International Trade)
BSB41603 Certificate IV in Occupational Health and Safety

DIPLOMA
BSB50101 Diploma of Business
BSB50201 Diploma of Business Administration
BSB50301 Diploma of Business (Recordkeeping)
BSB50401 Diploma of Business Management
BSB50501 Diploma of Business Development
BSB50601 Diploma of Business (Advertising)
BSB50701 Diploma of Business (Marketing)
BSB50801 Diploma of Business (Human Resources)
BSB50901 Diploma of Business (Governance)
BSA50200 Diploma of Business (Legal Services)
BSB51003 Diploma of Business (Frontline Management)
BSB51101 Diploma of e-Business
BSB51201 Diploma of Strategic e-Business Development
BSB51301 Diploma of e-Learning
BSB51403 Diploma of Business (Purchasing)
BSB51503 Diploma of Project Management
BSB51703 Diploma of Business (Franchising)
BSB51803 Diploma of Unionism
BSB51903 Diploma of Business (Quality Auditing)
BSB51903 Diploma in International Business
BSB51603 Diploma of Occupational Health and Safety

ADVANCED DIPLOMA
BSB60101 Advanced Diploma of Business (Recordkeeping)
BSB60201 Advanced Diploma of Business Management
BSB60301 Advanced Diploma of Business (Human Resources)
BSB60401 Advanced Diploma of Business Development
BSB60501 Advanced Diploma of Business (Advertising)
BSB60601 Advanced Diploma of Business (Marketing)
BSB60701 Advanced Diploma of e-Business
BSB60801 Advanced Diploma of Strategic e-Business Development
BSB60903 Advanced Diploma of Project Management
BSB61003 Advanced Diploma of Occupational Health and Safety

Units of competency in BSB01 Business Services Training Package

All the units of competency in BSB01 are listed below under fields and domains.

Note: Imported units are also shown in the lists below – either in the list relating to the specific domain, or in the list at the end titled 'Units imported from other Training Packages'. Where they are in the domain list they make up part of a specific qualification in that domain; where they are in the list of imported units, they can be selected according to the packaging advice in the Qualification Guide.

COMMON BUSINESS FIELD

Certificate I

BSBCMN101A	Prepare for work
BSBCMN102A	Complete daily work activities
BSBCMN103A	Apply basic communication skills
BSBCMN104A	Plan skills development
BSBCMN105A	Use business equipment
BSBCMN106A	Follow workplace safety procedures
BSBCMN107A	Operate a personal computer
BSBCMN108A	Develop keyboard skills
BSBCMN109A	Follow environmental work practices

Certificate II

BSBCMN201A	Work effectively in a business environment
BSBCMN202A	Organise and complete daily work activities
BSBCMN203A	Communicate in the workplace
BSBCMN204A	Work effectively with others
BSBCMN205A	Use business technology
BSBCMN206A	Process and maintain workplace information
BSBCMN207A	Prepare and process financial/business documents
BSBCMN208A	Deliver a service to customers
BSBCMN209A	Provide information to clients
BSBCMN210A	Implement improved work practices
BSBCMN211A	Participate in workplace safety procedures
BSBCMN212A	Handle mail
BSBCMN213A	Produce simple wordprocessed documents
BSBCMN214A	Create and use simple spreadsheets
BSBCMN215A	Participate in environmental work practices
BSBCMN216A	Create customer relationship
BSBCMN217A	Process customer feedback
BSBCMN218A	Apply basic first aid

Certificate III

BSBCMN301A	Exercise initiative in a business environment
BSBCMN302A	Organise personal work priorities and development
BSBCMN304A	Contribute to personal skill development and learning
BSBCMN305A	Organise workplace information
BSBCMN306A	Produce business documents
BSBCMN307A	Maintain business resources
BSBCMN308A	Maintain financial records
BSBCMN309A	Recommend products and services
BSBCMN310A	Deliver and monitor a service to customers
BSBCMN311A	Maintain workplace safety
BSBCMN312A	Support innovation and change
BSBCMN313A	Maintain environmental procedures
BSBCMN314A	Utilise a knowledge management system
BSBCMN315A	Work effectively with diversity
BSBCMN316A	Process customer complaints
BSBCMN317A	Meet customer needs and expectations
BSBCMN318A	Write simple documents
BSBCMN319A	Apply advanced first aid
BSBCMN320A	Maintain first aid equipment and resources

Certificate IV

BSBCMN402A	Develop work priorities
BSBCMN403A	Establish business networks
BSBCMN404A	Develop teams and individuals
BSBCMN405A	Analyse and present research information
BSBCMN406A	Maintain business technology
BSBCMN407A	Coordinate business resources
BSBCMN408A	Report on financial activity
BSBCMN409A	Promote products and services
BSBCMN410A	Coordinate implementation of customer service strategies
BSBCMN411A	Monitor a safe workplace
BSBCMN412A	Promote innovation and change
BSBCMN413A	Implement and monitor environmental policies
BSBCMN414A	Undertake marketing activities
BSBCMN415A	Manage first aid policy
BSBCMN416A	Identify risk and apply risk management processes
BSBCMN417A	Coordinate customer service activities
BSBCMN418A	Address customer needs
BSBCMN419A	Manage projects
BSBCMN420A	Write complex documents
BSBCMN421A	Assist with compliance with OHS and other relevant laws

BUSINESS ADMINISTRATION SERVICES FIELD

SPECIALIST ADMINISTRATION

Certificate III

BSBADM301A	Produce texts from shorthand notes
BSBADM302A	Produce texts from notes
BSBADM303A	Produce texts from audio transcription
BSBADM304A	Design and develop text documents
BSBADM305A	Create and use databases
BSBADM306A	Create electronic presentations
BSBADM307A	Organise schedules
BSBADM308A	Process payroll
BSBADM309A	Process accounts payable and receivable
BSBADM310A	Maintain a general ledger

Certificate IV

BSBADM401A	Produce complex texts from shorthand notes
BSBADM402A	Produce complex business documents
BSBADM403A	Develop and use complex databases
BSBADM404A	Develop and use complex spreadsheets
BSBADM405A	Organise meetings
BSBADM406A	Organise business travel
BSBADM407A	Administer projects
BSBADM408A	Prepare financial reports

Diploma

BSBADM501A	Manage the establishment and maintenance of a workgroup network
BSBADM502A	Manage meetings
BSBADM503A	Plan and manage conferences
BSBADM504A	Plan or review administration systems
BSBADM505A	Manage payroll
BSBADM506A	Manage business document design and development

LEGAL SERVICES

Certificate III

BSALPP301A	Apply knowledge of the legal system to complete tasks
BSALPP302A	Carry out search of the public record
BSALPP303A	Deliver court documentation
BSACS301A	Apply the principles of confidentiality and security within the legal environment
BSALR301A	Handle receipt and despatch of information
BSALC301A	Use legal terminology in order to carry out tasks
BSALO301A	Assist in prioritising and planning activities in a legal practice
BSALF301A	Maintain records for time and disbursements in a legal practice

Certificate IV

BSALPP401A	Prepare and produce complex legal documents
BSACS401A	Provide non-legal advice
BSALC401A	Interact with other parties
BSALC402A	Research, locate and provide legal and other information in response to requests
BSALF401A	Maintain trust accounts
BSALPL401A	Provide support in Property Law matters
BSALPL402A	Provide support in Family Law matters
BSALPL403A	Provide support in Criminal Law matters
BSALPL404A	Provide support in Commercial Law matters
FNAMERC03B	Serve legal process
BSALLG401A	Arrange documents and list exhibits for litigation support
206/01	Take instructions in relation to a transaction
206/05	Prepare and execute documents
CHCAD2A	Support the interests, rights and needs of clients within duty of care requirements
CHCCD7A	Support community resources
CHCCD3A	Meet information needs of the community
CHCCD1A	Support community participation

Diploma

BSALC501A	Run a file
BSALO501A	Perform legal research and prepare reports to meet identified needs
BSALPP501A	Obtain information from a client
BSALPP502A	Draft legally binding documents
BSALLG501A	Assist with the discovery process
BSALLG502A	Appear in court
BSALLG503A	Attend pre-trial negotiations
BSALPL501A	Cost complex files
BSALPL502A	Administer in-house mortgage practice
206/04	Negotiate with others to achieve tasks and goals
206/09	Finalise transaction
CHCCD8A	Support community action
CHCCD13A	Work within specific communities
CHCCD11A	Provide advocacy and representation

PURCHASING

Certificate III

BSBPUR301A	Purchase goods and services

Certificate IV

BSBPUR401A	Plan purchasing
BSBPUR402A	Negotiate contracts
BSBPUR403A	Conduct international purchasing

Diploma

BSBPUR501A	Develop, implement and review purchasing strategies
BSBPUR502A	Manage supplier relationships
BSBPUR503A	Manage international purchasing
BSBPUR504A	Manage a supply chain

MEDICAL ADMINISTRATION

Certificate II

BSBMED201A	Use basic medical terminology
BSBMED202A	Follow OHS policies and procedures in medical office

Certificate III

BSBMED301A	Use advanced medical terminology
BSBMED302A	Prepare and process medical accounts
BSBMED303A	Maintain patient records
BSBMED304A	Assist in controlling stocks and supplies
BSBMED305A	Apply the principles of confidentiality, privacy and security within the medical environment

Certificate IV

BSBMED401A	Manage patient record-keeping system
BSBMED402A	Control stocks and supplies

BUSINESS INFORMATION SERVICES FIELD

RECORDKEEPING

Certificate III

BSBRKG301A	Control records
BSBRKG302A	Undertake disposal
BSBRKG303A	Retrieve information from records
BSBRKG304A	Maintain business records

Certificate IV

BSBRKG401A	Review the status of a record
BSBRKG402A	Provide information from and about records
BSBRKG403A	Set up a business or records system for a small office
BSBEBUS406A	Monitor and maintain records in an online environment

Diploma

BSBRKG501A	Determine business or records system specifications
BSBRKG502A	Manage and monitor business or records systems
BSBRKG503A	Develop and maintain a classification scheme
BSBRKG504A	Develop terminology for activities and records
BSBRKG505A	Document or reconstruct a business or records system

Advanced Diploma

BSBRKG601A	Define recordkeeping framework
BSBRKG602A	Develop recordkeeping policy
BSBRKG603A	Prepare a functional analysis for an organisation
BSBRKG604A	Determine security and access rules and procedures
BSBRKG605A	Determine records requirements to document a function
BSBRKG606A	Design a records retention and disposal schedule
BSBRKG607A	Document and monitor the record-creating context
BSBRKG608A	Plan management of records over time

BUSINESS MANAGEMENT SERVICES FIELD

SMALL BUSINESS MANAGEMENT

Certificate III

BSBSBM301A	Research business opportunities

Certificate IV

BSBSBM401A	Establish business and legal requirements
BSBSBM402A	Undertake financial planning
BSBSBM403A	Promote the business
BSBSBM404A	Undertake business planning
BSBSBM405A	Monitor and manage business operations
BSBSBM406A	Manage finances
BSBSBM407A	Manage a small team

FRONTLINE MANAGEMENT

Certificate III

BSBFLM303B	Contribute to effective workplace relationships
BSBFLM305B	Support operational plan
BSBFLM306B	Provide workplace information and resourcing plans
BSBFLM309B	Support continuous improvement systems and processes
BSBFLM311B	Support a workplace learning environment
BSBFLM312A	Contribute to team effectiveness

Certificate IV

BSBFLM403B	Implement effective workplace relationships
BSBFLM405B	Implement operational plan
BSBFLM406B	Implement workplace information system
BSBFLM409B	Implement continuous improvement
BSBFLM412A	Promote team effectiveness

Diploma

BSBFLM501B	Manage personal work priorities and professional development
BSBFLM503B	Manage effective workplace relationships
BSBFLM505B	Manage operational plan
BSBFLM506B	Manage workplace information systems
BSBFLM507B	Manage quality customer service
BSBFLM509B	Facilitate continuous improvement
BSBFLM510B	Facilitate and capitalise on change and innovation
BSBFLM511B	Develop a workplace learning environment
BSBFLM512A	Ensure team effectiveness
BSBFLM513A	Manage budgets and financial plans within the work team
BSBFLM514A	Manage people

GOVERNANCE (INDIGENOUS ORGANISATIONS)

Certificate IV

BSBATSIL401A	Meet the roles and responsibilities of a Board member (1)
BSBATSIL402A	Use the constitution
BSBATSIC403A	Maintain and protect culture
BSBATSIM404A	Use the business plan
BSBATSIM405A	Monitor financial management and budgets
BSBATSIM406A	Manage assets
BSBATSIM407A	Plan for organisational needs
BSBATSIL408A	Manage a Board meeting
BSBATSIL409A	Manage time
BSBATSIL410A	Manage stress
BSBATSIC411A	Communicate with the community
BSBATSIM412A	Implement a business-like approach
BSBATSIM413A	Oversee business planning
BSBATSIM414A	Oversee the organisation's annual budget
BSBATSIM415A	Contribute to a positive and culturally appropriate workplace
BSBATSIW416A	Obtain and manage consultancy services
BSBATSIW417A	Select and utilise technology

Diploma

BSBATSIL501A	Meet the roles and responsibilities of a Board member (2)
BSBATSIL502A	Work with the manager
BSBATSIL503A	Manage conflict
BSBATSIM504A	Develop and implement organisational policies
BSBATSIM505A	Control organisation finances
BSBATSIM506A	Develop employment policies
BSBATSIM507A	Establish and maintain a strategic planning cycle
BSBATSIL508A	Be a community leader
BSBATSIL509A	Manage self as a Board member
BSBATSIC510A	Conduct a community meeting
BSBATSIM511A	Develop enterprise opportunities
BSBATSIM512A	Manage board competencies

BSBATSIM513A	Oversee recruitment and induction of staff
BSBATSIW514A	Represent your organisation
BSBATSIW515A	Secure funding

STRATEGIC MANAGEMENT

Diploma

BSBMGT501A	Market services and concepts to internal customers
BSBMGT502A	Manage people performance
BSBMGT503A	Prepare budgets and financial plans
BSBMGT504A	Manage budgets and financial plans
BSBMGT505A	Ensure a safe workplace
BSBMGT506A	Recruit, select and induct staff
BSBMGT507A	Manage environmental performance
BSBMGT508A	Manage risk management system
BSBMGT509A	Manage a knowledge management system
BSBMGT510A	Determine needs of customer populations
BSBMGT511A	Develop a business opportunity
BSBMGT512A	Manage relationships in a family business
BSBMGT513A	Plan for family business succession
BSBMGT514A	Plan and manage growth in a family business

Advanced Diploma

BSBMGT601A	Contribute to strategic direction
BSBMGT602A	Contribute to the development and implementation of strategic plans
BSBMGT603A	Review and develop business plans
BSBMGT604A	Manage business operations
BSBMGT605A	Provide leadership across the organisation
BSBMGT606A	Manage customer focus
BSBMGT607A	Manage knowledge and information
BSBMGT608A	Manage innovation and continuous improvement
BSBMGT609A	Manage risk
BSBMGT610A	Manage environmental management systems
BSBMGT611A	Develop risk management strategy
BSBMGT612A	Plan and implement a knowledge management system
BSBMGT613A	Review and improve a knowledge management system
BSBMGT614A	Develop and implement diversity policy

PROJECT MANAGEMENT

Certificate IV

BSBPM401A	Apply scope management techniques
BSBPM402A	Apply time management techniques
BSBPM403A	Apply cost management techniques
BSBPM404A	Apply quality management techniques

BSBPM405A	Apply human resource management approaches
BSBPM406A	Apply communications management techniques
BSBPM407A	Apply risk management techniques
BSBPM408A	Apply contract procurement techniques

Diploma

BSBPM501A	Manage application of project integrative processes
BSBPM502A	Manage project scope
BSBPM503A	Manage project time
BSBPM504A	Manage project costs
BSBPM505A	Manage project quality
BSBPM506A	Manage project human resources
BSBPM507A	Manage project communications
BSBPM508A	Manage project risk
BSBPM509A	Manage project procurement

Advanced Diploma

BSBPM601A	Direct the integration of multiple projects/programs
BSBPM602A	Direct the scope of multiple projects/programs
BSBPM603A	Direct time management of multiple projects/programs
BSBPM604A	Direct cost management of multiple projects/programs
BSBPM605A	Direct quality management of multiple projects/programs
BSBPM606A	Direct human resources management of multiple projects/programs
BSBPM607A	Direct communications management of multiple projects/programs
BSBPM608A	Direct risk management of multiple projects/programs
BSBPM609A	Direct project procurement and contracts of multiple projects/programs

FRANCHISING

Certificate III

BSBFRA301A	Work within a franchise

Certificate IV

BSBFRA401A	Manage compliance with franchisee obligations and legislative requirements
BSBFRA402A	Establish a franchise
BSBFRA403A	Manage relationship with franchisor
BSBFRA404A	Manage a multiple site franchise

Diploma

BSBFRA501A	Establish a franchise operation
BSBFRA502A	Manage a franchise operation
BSBFRA503A	Manage establishment of new sites or regions
BSBFRA504A	Manage relationships with franchisees
BSBFRA505A	Manage closure of a franchise

QUALITY AUDITING

Certificate IV

BSBAUD401A	Prepare for a quality audit
BSBAUD402A	Participate in a quality audit

Diploma

BSBAUD501A	Initiate a quality audit
BSBAUD502A	Prepare to lead a quality audit
BSBAUD503A	Lead a quality audit
BSBAUD504A	Report on a quality audit

OHS

Certificate IV

BSBOHS401A	Contribute to the implementation of a systematic approach to managing OHS
BSBOHS402A	Contribute to the implementation of the OHS consultation process
BSBOHS403A	Identify hazards and assess OHS risks
BSBOHS404A	Contribute to the implementation of strategies to control OHS risk
BSBOHS405A	Contribute to the implementation of emergency procedures
BSBOHS406A	Use equipment to conduct workplace monitoring

Diploma

BSBOHS501A	Participate in the coordination and maintenance of a systematic approach to managing OHS
BSBOHS502A	Participate in the management of the OHS information and data systems
BSBOHS503A	Assist in the design and development of OHS participative arrangements
BSBOHS504A	Apply principles of OHS risk management
BSBOHS505A	Manage hazards in the work environment
BSBOHS506A	Monitor and facilitate the management of hazards associated with plant
BSBOHS507A	Facilitate the application of principles of occupational health to control OHS risk
BSBOHS508A	Participate in the investigation of incidents

Advanced Diploma

BSBOHS601A	Develop a systematic approach to managing OHS
BSBOHS602A	Develop OHS information and data analysis and reporting and recording processes
BSBOHS603A	Analyse and evaluate OHS risk
BSBOHS604A	Apply ergonomic principles to control OHS risk

BSBOHS605A	Apply occupational hygiene principles to control OHS risk
BSBOHS606A	Develop and implement crisis management processes
BSBOHS607A	Advise on application of safe design principles to control OHS risk
BSBOHS608A	Conduct an OHS audit
BSBOHS609A	Evaluate an organisation's OHS performance

COMPLIANCE MANAGEMENT

Certificate IV

BSBCOM401A	Organise and monitor the operation of compliance management system
BSBCOM402A	Implement processes for the management of breaches in compliance requirements
BSBCOM403A	Promote and liaise on compliance requirements, systems and related issues

Diploma

BSBCOM501A	Identify and interpret compliance requirements
BSBCOM502A	Evaluate and review compliance
BSBCOM503A	Develop processes for the management of breaches in compliance requirements
BSBCOM504A	Create a culture of compliance within an organisation

Advanced Diploma

BSBCOM601A	Research compliance requirements and issues
BSBCOM602A	Develop and create compliance requirements
BSBCOM603A	Plan and establish compliance management systems

HUMAN RESOURCES MANAGEMENT FIELD

HUMAN RESOURCES

Certificate IV

BSBHR401A	Administer human resource systems
BSBHR402A	Recruit and select personnel
BSBHR403A	Process human resource documents and inquiries
BSBHR404A	Co-ordinate human resource services
BSBHR405A	Implement industrial relations procedures

Diploma

BSBHR501A	Manage human resource consultancy services
BSBHR502A	Manage human resource management information systems

BSBHR503A	Manage performance management systems
BSBHR504A	Manage industrial relations policies and processes
BSBHR505A	Manage remuneration and employee benefits
BSBHR506A	Manage recruitment selection and induction processes
BSBHR507A	Manage separation/termination
BSBHR508A	Manage work/life skills
BSBHR509A	Manage rehabilitation/return to work programs
BSBHR510A	Plan mediation processes
BSBHR511A	Implement mediation processes
BSBHR512A	Manage industrial relations initiatives
BSBHR513A	Manage industrial relations disputes

Advanced Diploma

BSBHR601A	Manage change
BSBHR602A	Manage human resource strategic planning
BSBHR603A	Contribute to organisation development
BSBHR604A	Manage employee relations
BSBHR605A	Contribute to organisation design

ASSESSMENT AND WORKPLACE TRAINING

Certificate IV

BSZ401A	Plan assessment
BSZ402A	Conduct assessment
BSZ403A	Review assessment
BSZ404A	Train small groups
BSZ405A	Plan and promote a training program
BSZ406A	Plan a series of training sessions
BSZ407A	Deliver training sessions
BSZ408A	Review training

Diploma

BSZ501A	Analyse competency requirements
BSZ502A	Design and establish the training system
BSZ503A	Design and establish the assessment system
BSZ504A	Manage the training and assessment system
BSZ505A	Evaluate the training and assessment system
BSZ506A	Develop assessment procedures
BSZ507A	Develop assessment tools
BSZ508A	Design training courses

UNIONISM

Certificate IV

BSBUN401A	Develop and implement an organising plan
BSBUN402A	Empower members
BSBUN403A	Communicate with workers

BSBUN404A	Promote equality of opportunity and fair treatment for all members
BSBUN405A	Promote the values, principles and policies of the union
BSBUN406A	Undertake bargaining
BSBUN407A	Provide advice to union members and undertake negotiations
BSBUN408A	Prepare cases for the union
BSBUN409A	Appear before tribunals and represent members

Diploma

BSBUN501A	Develop, manage and review campaigns and projects
BSBUN502A	Represent the union in key forums
BSBUN503A	Coordinate case preparation and research
BSBUN504A	Advocate and present cases for members
BSBUN505A	Develop, implement and manage union policy
BSBUN506A	Coordinate research and analysis

EMPLOYMENT SERVICES

Certificate IV

BSBEMS401A	Develop and implement business development strategies to expand client base
BSBEMS402A	Develop and implement strategies to source and assess candidates
BSBEMS403A	Develop and provide employment management services to candidates
BSBEMS404A	Manage the recruitment process for client organisations

BUSINESS DEVELOPMENT FIELD

ADVERTISING

Certificate IV

BSBADV401A	Profile a target audience
BSBADV402A	Conduct pre-campaign testing
BSBADV403A	Monitor advertising production
BSBADV404A	Schedule advertisements

Diploma

BSBADV501A	Develop a creative concept
BSBADV502A	Write persuasive copy
BSBADV503A	Coordinate advertising research
BSBADV504A	Create advertisements
BSBADV505A	Evaluate and recommend 'above the line' media options
BSBADV506A	Evaluate and recommend 'below the line' media options
BSBADV507A	Develop a media plan
BSBADV508A	Present an advertising campaign

Advanced Diploma

BSBADV601A	Create an advertising brief
BSBADV602A	Develop an advertising campaign
BSBADV603A	Manage advertising production
BSBADV604A	Execute an advertising campaign

BSBADV605A	Evaluate campaign effectiveness

MARKETING

Certificate III

BSBMKG301A	Research the market
BSBMKG302A	Identify marketing opportunities
BSBMKG303A	Draft an elementary marketing audit report
BSBMKG304A	Assist with market research

Certificate IV

BSBMKG401A	Profile the market
BSBMKG402A	Analyse consumer behaviour for specific markets
BSBMKG403A	Analyse market data
BSBMKG404A	Forecast market and business needs
BSBMKG405A	Implement and monitor marketing activities
BSBMKG406A	Build client relationships
BSBMKG407A	Make a presentation
BSBMKG408A	Conduct market research

Diploma

BSBMKG501A	Evaluate marketing opportunities
BSBMKG502A	Establish and adjust the marketing mix
BSBMKG503A	Develop a marketing communications plan
BSBMKG504A	Implement a marketing solution
BSBMKG505A	Review marketing performance
BSBMKG506A	Plan market research

Advanced Diploma

BSBMKG601A	Develop marketing strategies
BSBMKG602A	Develop a marketing plan
BSBMKG603A	Manage the marketing process
BSBMKG604A	Develop and manage direct marketing campaigns
BSBMKG605A	Evaluate international marketing opportunities
BSBMKG606A	Manage international marketing programs
BSBMKG607A	Manage market research

SALES

Certificate III

BSBSLS301A	Develop product knowledge
BSBSLS302A	Identify sales prospects
BSBSLS303A	Present a sales solution
BSBSLS304A	Secure prospect commitment
BSBSLS305A	Support post-sale activities
BSBSLS306A	Self-manage sales performance

Certificate IV

BSBSLS401A	Lead a sales team

E-BUSINESS FIELD

e-BUSINESS

Certificate III

BSBEBUS301A	Search and assess online business information
BSBEBUS302A	Use and maintain electronic mail system
BSBEBUS303A	Participate in a virtual community
BSBEBUS304A	Buy online
BSBEBUS305A	Sell online
BSBEBUS306A	Make payments online
BSBEBUS307A	Bank online
BSBEBUS308A	Maintain online business records
BSBEBUS309A	Undertake e-learning
BSBEBUS310A	Work effectively as an off-site e-worker

Certificate IV

BSBEBUS401A	Conduct online research
BSBEBUS402A	Implement e-correspondence policies
BSBEBUS403A	Communicate electronically
BSBEBUS404A	Trade online
BSBEBUS405A	Conduct online financial transactions
BSBEBUS406A	Monitor and maintain records in an online environment
BSBEBUS407A	Review and maintain the business aspects of a website
BSBEBUS408A	Implement and monitor delivery of quality customer service online
BSBEBUS409A	Lead and facilitate e-staff

Diploma

BSBEBUS501A	Evaluate e-business opportunities
BSBEBUS502A	Evaluate e-business models
BSBEBUS503A	Design an e-business
BSBEBUS504A	implement an e-business strategy
BSBEBUS505A	Implement new technologies for business
BSBEBUS506A	Plan and develop a business website
BSBEBUS507A	Manage the business aspects of a website
BSBEBUS508A	Build a virtual community
BSBEBUS509A	Implement e-business outsourcing arrangements
BSBEBUS510A	Manage e-business outsourcing
BSBEBUS511A	Implement a knowledge management strategy for an e-business
BSBEBUS512A	Implement electronic communication policy
BSBEBUS513A	Plan e-learning
BSBEBUS514A	Implement e-learning
BSBEBUS515A	Facilitate e-learning
BSBEBUS516A	Manage online purchasing
BSBEBUS517A	Manage online inventory
BSBEBUS518A	Manage an e-business supply chain
BSBEBUS519A	Manage online sales systems
BSBEBUS520A	Manage online payments systems
BSBEBUS521A	Plan e-marketing communications
BSBEBUS522A	Conduct e-marketing communications
BSBEBUS523A	Investigate and plan e-work business solutions
BSBEBUS524A	Implement and manage e-working arrangements

Advanced Diploma

BSBEBUS601A	Develop an e-business strategy
BSBEBUS602A	Develop an action plan for an e-business strategy
BSBEBUS603A	Evaluate new technologies for business
BSBEBUS604A	Develop a business website strategy
BSBEBUS605A	Identify and implement e-business innovation
BSBEBUS606A	Manage e-business risk
BSBEBUS607A	Develop e-business outsourcing policy and guidelines
BSBEBUS608A	Develop and implement online information policy
BSBEBUS609A	Develop a knowledge management strategy for an e-business
BSBEBUS610A	Develop electronic communication policy
BSBEBUS611A	Develop and implement e-business human resource management policy and practices
BSBEBUS612A	Develop and implement e-work policy and guidelines
BSBEBUS613A	Develop online customer service strategies
BSBEBUS614A	Build online customer loyalty
BSBEBUS615A	Use online systems to support managerial decision-making
BSBEBUS616A	Plan an e-business supply chain

INTERNATIONAL SERVICES FIELD

INTERNATIONAL TRADE / BUSINESS

Certificate III

BSBINT301A	Apply knowledge of the international trade environment to complete work
BSBINT302A	Apply knowledge of legislation relevant to international trade to complete work
BSBINT303A	Organise the importing and exporting of goods
BSBINT304A	Assist in the international transfer of services
BSBINT305A	Prepare business documents for the international trade of goods
BSBINT306A	Apply knowledge of international finance and insurance to complete work requirements

Certificate IV

BSBINT401A	Research international business opportunities
BSBINT402A	Market goods and services internationally

BSBINT403A	Research international markets
BSBINT404A	Implement international client relationship strategies
BSBINT405A	Apply knowledge of import and export international conventions, laws and finance
BSBINT406A	Promote compliance with legislation
BSBINT407A	Prepare business advice on export Free on Board Value
BSBINT408A	Prepare business advice on the taxes and duties for international trade transactions
BSBINT409A	Plan for international trade

Diploma

BSBINT501A	Profile international markets
BSBINT502A	Analyse consumer behaviour for specific international markets
BSBINT503A	Analyse data from international markets
BSBINT504A	Forecast international market and business needs
BSBINT505A	Build international client relationships
BSBINT506A	Build international business networks
BSBINT507A	Report on finances related to international business
BSBINT508A	Promote products and services to international markets

IMPORTED UNITS FOR THE E-BUSINESS BLENDED QUALIFICATIONS

ICAITAD043A	Develop and present a feasibility report
ICAITAD051B	Develop client user interface
ICAITAD052B	Design IT security framework
ICAITAD053B	Design system security and controls
ICAITAD054B	Validate quality and completeness of design
ICAITAD138A	Determine acceptable solution providers for e-business projects
ICAITAD141A	Design dynamic websites to meet technical requirements
ICAITAD146A	Develop web site information architecture
ICAITAD147A	Determine that data base functionality and scalability suits business requirements
ICAITAD148A	Identify new technology models for e-business
ICAITAD149A	Implement quality assurance process for e-commerce solutions
ICAITAD150A	Evaluate vendor products and equipment
ICAITAD151A	Gather data to identify business requirements
ICAITAD152A	Implement risk management processes
ICAITAD156A	Review and plan for risk to e-commerce solution providers

ICAITAD157A	Develop technical requirements for an e-commerce solution
ICAITAD158A	Translate the business needs into technical requirements
ICAITB059A	Develop detailed technical design
ICAITB073B	Pilot the developed system
ICAITB074B	Monitor the system pilot
ICAITD208A	Writing for the World Wide Web
ICAITS108B	Complete database backup and recovery
ICAITS116A	Undertake capacity planning
ICAITS119B	Monitor and administer system security
ICAITS191A	Maintain web site performance
ICAITS194A	Ensure basic web site security
ICAITS199A	Manage E-commerce websites
ICAITS200A	Monitor traffic and compile specified site traffic reports
ICAITS202A	Ensure privacy for users
ICAITS203A	Choose a web hosting service
ICAITSP039B	Match the IT needs with the strategic direction of the enterprise
ICAITSP040A	Manage and review contracts
ICAITT183A	Confirm accessibility of web site design
ICAITT184A	Ensure site usability
ICAITTW214A	Maintain ethical conduct
ICAITU127B	Support system software
ICAITU205A	Select and employ software and hardware multimedia tools
CUFIMA01A	Produce and manipulate digital images
CUFIMA04A	Create 3D digital animation
CUFIMA05A	Create 3D digital models and images
CUFMEM06A	Design a multimedia product
CUFMEM07A	Apply principles of visual design and communication to the development of a multimedia product
CUFMEM08A	Apply principles of instructional design to a multimedia product
CUFMEM10A	Design and create a multimedia interface
CUFMEM11A	Design the navigation for a multimedia product
CULLB412A	Undertake cataloguing activities

UNITS IMPORTED FROM OTHER TRAINING PACKAGES (SEE NOTE AT TOP OF TABLE ON PAGE 14)

Diversity

THHGLE09B	Manage workplace diversity

Employment Services

CHCAD1A	Advocate for clients
CHCCS1A	Deliver and monitor service to clients
CHCCS401A	Facilitate cooperative behaviour
CHCES302A	Work with government in a purchaser provider relationship
CHCES304A	Deliver recruitment services
CHCES305A	Monitor New Apprenticeships support services

CHCES303A	Work within a legal and ethical framework
CHCES402A	Deliver New Apprenticeship support services
CHCES301A	Work in Employment Services area
CHCCAR501A	Provide careers guidance
CHCES303A	Use labour market information
CHCCM2A	Establish and monitor a case plan
CHCES406A	Provide job search support
CHCCM4A	Promote high quality case management
CHCORG29A	Provide coaching and motivation
CHCCS2A	Develop and deliver client service
CHCCD12B	Apply a community development framework
CHCCS3B	Coordinate the provision of services and programs
CHCCS402A	Respond holistically to client issues
CHCCS5A	Identify and address specific client issues
CHCCS405A	Work effectively with culturally diverse clients and co-workers
CHCES405A	Monitor service performance in a purchaser provider relationship with government
CHCDIS18A	Support people with disabilities as workers
CHCCS6A	Assess and deliver services to clients with complex needs
CHCDIS9B	Maximise participation in work by people with disabilities
CHCDIS8A	Work with clients intensively
CHCES502A	Research and report on labour market information
CHCES401A	Analyse and apply labour market information
CHCCS4A	Manage the delivery of quality client service
CHCES403A	Develop and monitor employment plans
CHCDIS11A	Coordinate disability work
CHCES404A	Promote clients to employers
CHCES501A	Manage service delivery in a purchaser-provider relationship with government
PSPGOV603A	Develop a tender submission

Purchasing	
LGACOM409A	Prepare tender documents
PSPPROC602A	Direct management of contracts
PSPPROC702A	Establish the procurement context

Structure of BSB01 Volumes

VOLUME 1	VOLUME 2A	VOLUME 2B	VOLUME 3	VOLUME 4A	VOLUME 4B	VOLUME 4C
Introduction Qualification Guide Assessment Guidelines	**Units of Competency** **Field:** BUSINESS ADMINISTRATION SERVICES **Domain:** Legal Services Medical Administration Purchasing	**Units of Competency** **Field:** BUSINESS ADMINISTRATION SERVICES **Domain:** Specialist Administration	**Units of Competency** **Field:** BUSINESS INFORMATION SERVICES **Domain:** Recordkeeping	**Units of Competency** **Field:** BUSINESS MANAGEMENT SERVICES **Domain:** Small Business Management Governance (Indigenous Organisations) Franchising Quality Auditing	**Units of Competency** **Field:** BUSINESS MANAGEMENT SERVICES **Domain:** Project Management	**Units of Competency** **Field:** BUSINESS MANAGEMENT SERVICES **Domain:** Strategic Management Frontline Management

	VOLUME 4D	VOLUME 5A	VOLUME 5B	VOLUME 6	VOLUME 7	VOLUME 8
Units of Competency **Field:** COMMON BUSINESS **Domain:** Common	**Units of Competency** **Field:** BUSINESS MANAGEMENT SERVICES **Domain:** Occupational Health & Safety Compliance Management	**Units of Competency** **Field:** HUMAN RESOURCE MANAGEMENT **Domain:** Human Resources Employment Services Unionism	**Units of Competency** **Field:** HUMAN RESOURCE MANAGEMENT **Domain:** Assessment and Workplace Training *[This domain will be replaced after the Training And Assessment Training Package is endorsed]*	**Units of Competency** **Field:** E-BUSINESS **Domain:** E-Business	**Units of Competency** **Field:** BUSINESS DEVELOPMENT **Domain:** Advertising Sales Marketing	**Units of Competency** **Field:** INTERNATIONAL SERVICES **Domain:** International Trade International Business

Competency Standards

The broad concept of industry competency concerns the ability to perform particular tasks and duties to the standard of performance expected in the workplace. Competency requires the application of specified skills, knowledge and attitudes relevant to effective participation in an industry, industry sector or enterprise.

Competency covers all aspects of workplace performance and involves performing individual tasks; managing a range of different tasks; responding to contingencies or breakdowns; and, dealing with the responsibilities of the workplace, including working with others. Workplace competency requires the ability to apply relevant skills, knowledge and attitudes consistently over time and in the required workplace situations and environments. In line with this concept of competency Training Packages focus on what is expected of a competent individual in the workplace as an outcome of learning, rather than focussing on the learning process itself.

Competency standards in industry Training Packages are determined by industry to meet identified industry skill needs. Competency standards are made up of a number of units of competency each of which describes a key function or role in a particular job function or occupation. Each unit of competency within a Training Package is linked to one or more AQF qualifications.

Contextualisation of Units of Competency by RTOs

Registered Training Organisation (RTOs) may contextualise units of competency to reflect local outcomes required. Contextualisation could involve additions or amendments to the unit of competency to suit particular delivery methods, learner profiles, specific enterprise equipment requirements, or to otherwise meet local needs. However, the integrity of the overall intended outcome of the unit of competency must be maintained.

Any contextualisation of units of competency in this endorsed Training Package must be within the bounds of the following advice. In contextualising units of competency, RTOs:

- must not remove or add to the number and content of elements and performance criteria
- may add specific industry terminology to performance criteria where this does not distort or narrow the competency outcomes
- may make amendments and additions to the range statement as long as such changes do not diminish the breadth of application of the competency and reduce its portability, and/or
- may add detail to the evidence guide in areas such as the critical aspects of evidence or resources and infrastructure required where these expand the breadth of the competency but do not limit its use.

Components of Units of Competency

The components of units of competency are summarised below, in the order in which they appear in each unit of competency.

Unit Title

The unit title is a succinct statement of the outcome of the specific unit of competency. Each unit of competency title is unique, both within and across Training Packages.

Unit Descriptor

The unit descriptor broadly communicates the purpose of the unit of competency and the skill area it addresses. Where units of competency have been contextualised from units of competency from other endorsed Training Packages, summary information about the relationship of the units of competency is provided in the unit descriptor.

Competency Field (Optional)

The competency field either reflects the way the units of competency are categorised in the Training Package or denotes the industry sector, specialisation or function. It is an optional component of the unit of competency.

Application of the Competency

The application of the competency fleshes out the scope, purpose and operation of the unit of competency in different contexts, for example its application in the workplace.

Elements of Competency

The elements of competency are the basic building blocks of the unit of competency. They describe in terms of outcomes the significant functions and tasks that make up the competency.

Performance Criteria

The performance criteria specify the required performance in relevant tasks, roles, skills and in the applied knowledge that enables competent performance.

Range Statement

The range statement provides a context for the unit of competency, describing any variables that may apply in workplace situations.

Evidence Guide

The evidence guide is critical in assessment as it provides information to the Registered Training Organisation (RTO) and assessor about how the described competency may be demonstrated. The evidence guide does this by providing a range of evidence for the assessor to make determinations, and by providing the assessment context. The evidence guide describes:

- conditions under which competency must be assessed including variables such as the assessment environment or necessary equipment
- relationships with the assessment of any other units of competency
- suitable methodologies for conducting assessment including the potential for workplace simulation
- resource implications, for example access to particular equipment, infrastructure or situations
- how consistency in performance can be assessed over time, various contexts and with a range of evidence, and
- the required underpinning knowledge and skills

Key Competencies

All Training Packages require the integration of Key Competencies either in each unit of competency, or across a qualification, depending on industry needs and preferences.

The Key Competencies were first defined in 1992 in the project report, *Putting General Education to Work: The Key Competencies Report (Mayer Committee 1992)*. The skills and

knowledge they describe are essential for effective workplace participation and involve the sorts of capabilities commonly used by employers as selection criteria. They underpin the ability of employees to adapt to technological, organisational, societal and functional change.

The Key Competencies are generic, in that they apply to work in general, rather than to particular occupations or industries. They focus on the application of knowledge and skills in an integrated way in workplace situations. The seven Key Competencies are:

1   Collecting, analysing and organising information

The capacity to locate, sift and sort information in order to select what is required and to present it in a useful way, and evaluate both the information itself and the sources and methods used to collect it.

2   Communicating ideas and information

The capacity to communicate effectively with others using the range of spoken, written, graphic and other non-verbal means of expression.

3   Planning and organising activities

The capacity to plan and organise one's own work activities, including making good use of time and resources, sorting out priorities and monitoring one's performance.

4   Working with others in teams

The capacity to interact effectively with other people both on a one-to-one basis and in groups, including understanding and responding to the needs of a client and working effectively as a member of a team to achieve a shared goal.

5   Solving problems

The capacity to apply problem-solving strategies in purposeful ways, both in situations where the problem and the solution are clearly evident and in situations requiring creative thinking and a creative approach to achieve a desired outcome.

6   Using mathematical ideas and techniques

The capacity to use mathematical ideas, such as number and space, and techniques such as estimation and approximation, for practical purposes.

7   Using technology

The capacity to apply technology, combining the physical and sensory skills needed to operate equipment with the understanding of scientific and technological principles needed to explore and adapt systems.

Performance Levels

There are three levels of performance defined within the Key Competencies. These are stand-alone levels and do not correspond to the AQF qualification levels.

- **Performance Level 1** is concerned with the level of competence needed to undertake activities efficiently with sufficient self-management to meet the explicit requirements of the activity, and to make judgements about the quality of outcomes against established criteria.

- **Performance Level 2** describes the competence needed to manage activities requiring the selection, application and integration of a number of elements, and to select from established criteria to judge quality of process and outcome.

- **Performance Level 3** describes the competence needed to evaluate and reshape processes, to establish and use principles in order to determine appropriate ways of approaching activities, and to establish criteria for judging quality of process and outcome.

However, relating performance to the specific industry or workplace context may be more useful than interpreting the somewhat abstracted performance levels provided above. Where the Key Competencies are defined in the unit of competency, you will find them in a table, together with examples of their application, to help with assessment of their performance. Also, in evaluating the level of performance for the Key Competencies, consider the performance expectations at the AQF qualification level involved.

Delivery and Assessment of Key Competencies

The Key Competencies are integral to workplace competency, and, as such must be explicitly considered in the design, customisation, delivery and assessment of vocational education and training programs as represented diagrammatically below.
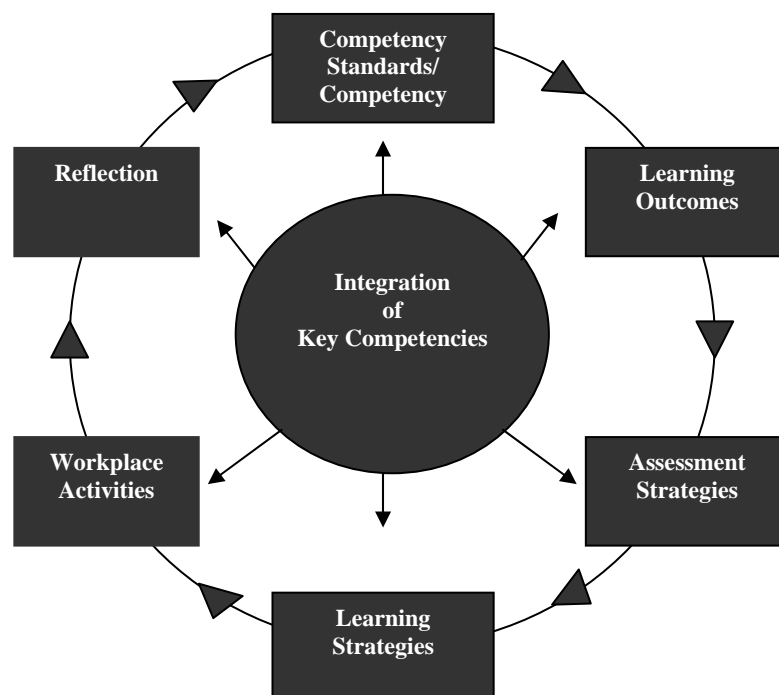
BSB01 Business Services Training Package

Advertising
Competency Standards

CONTENTS

BSBADV401A   Profile a target audience

Unit Descriptor   This unit covers segmenting the market and profiling a target audience to enable targeting of products/services.

This unit is related to BSBADV503A Coordinate advertising research.

Competency Field   Business Development

Element   Performance Criteria

1. Identify the target market   1.1 *Approaches* to determining and describing the total market for a product or service are evaluated and chosen

                                 1.2 The target market is defined in terms of the consumers to be included as prospective users of a product or service

                                 1.3 Descriptions of the target market use the same *terms as those used to describe media audiences*

2. Segment the market   2.1 *Criteria* to use in segmenting the market are evaluated and chosen in accordance with the advertising brief

                                 2.2 *Sources of information for segmenting and profiling markets* are identified and accessed in accordance with the advertising brief

                                 2.3 The market is segmented in accordance with the selected criteria

                                 2.4 Market segments are evaluated for their usefulness in terms of size, potential, distinctive needs, easy identification of members, and/or distinctive media use patterns

                                 2.5 Market segment/s are selected to meet the requirements of the advertising brief or new segmentation criteria are chosen and applied

3. Profile target audience   3.1 The total market and the selected market segment/s are described in the form of a consumer profile that identifies *consumer* characteristics in *standard statistical terms* and/or the descriptive terms used in media selection

                                 3.2 *Demographic* and /or *psychographic* descriptions are used in the consumer profile in accordance with the requirements of the advertising brief

                                 3.3 The profile meets organisational requirements in terms of language, format, content and level of detail

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Approaches to determining the total market may include:	• identifying consumers with relevant needs • identifying current users of a product or service • identifying people with related characteristics
Terms used to describe media audiences may include:	• demographics: • age • sex • education • marital status • occupation • nationality • first language • children • income
Market segmentation is	• the process of dividing a market into consumer subgroups, each of which has different needs
Criteria to use in market segmentation may include:	• consumer needs • benefits desired • product/service usage • attitude • demographics • lifestyle • social and cultural factors • business characteristics

Range Statement

Sources of information for segmenting and profiling markets may include:

- industry sources
- existing research data
- original a priori research (where the market segments are assumed at the beginning and research is used to confirm them)
- original response based research

Consumers may include:

- individuals
- businesses
- households

Standard statistical terms

- are those categories used by the Australian Bureau of statistics in collecting and reporting census data

Demographic descriptions may include:

- date and place of birth
- sex
- nationality
- indigenous Australian
- education
- occupation
- marital status
- first language
- other languages spoken at home
- number and age of children
- income level
- disability

Psychographic descriptions may include:

- activities
- interests
- opinions
- values
- attitudes
- lifestyle

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence
- Integrated demonstration of all elements of competency and their performance criteria
- Rationale for choosing approach to describing the market and segmentation criteria

Underpinning Knowledge*

* At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Advertising brief
- Purposes of advertising
- Advertising objectives

Underpinning Skills
- Literacy skills to identify demographic and other information, to write descriptive
- Communication including clarifying and reporting
- Numeracy skills for collecting and analysing quantitative information
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement

- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package

- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment

- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 2	Level 2	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to evaluate market segments
- **Communicating ideas and information** – through the development of a consumer profile
- **Planning and organising activities** – to choose approaches and criteria to segment the market
- **Working with teams and others** – to identify and access sources of information for segmenting and profiling
- **Using mathematical ideas and techniques** – to analyse data and draw conclusions
- **Solving problems** – by evaluating segments and re-doing the process if necessary
- **Using technology** – to apply segmentation criteria and analyse data if required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBADV402A   Conduct pre-campaign testing

Unit Descriptor   This unit covers piloting an advertising campaign in order to make adjustments that maximise the effectiveness of the campaign.

This unit is related to BSBADV604A Execute an advertising campaign.

Competency Field   Business Development

Element	Performance Criteria
1. Plan for pre-campaign testing	1.1 *Aspects of the advertisement to be tested* are identified and the measurement tools selected are valid and reliable
	1.2 Expected outcomes and targets are identified and documented
	1.3 The test group and timing of the pilot advertisement are identified in accordance with the requirements of the advertising brief
	1.4 Media placement is negotiated in accordance with budgetary and scheduling requirements
2. Pilot the advertisement	2.1 The advertisement is tested in accordance with the requirements of the advertising brief and budgetary constraints
	2.2 Data collection is conducted in accordance with the requirements of the evaluation tool/s and the advertising brief
3. Utilise pre-campaign test results	3.1 Test results are analysed for their impact on the advertising campaign
	3.2 Changes made to the advertisement, or the media schedule in response to pre-test information meet the requirements of the advertiser
	3.3 Amended advertisements meet *legal and ethical requirements*

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Pre-campaign testing is:	• a measure of advertising effectiveness that is made before the advertising program has been implemented
Aspects of the advertisement to be tested may include:	• appeal • impact • product/brand identification • interpretation • message clarity • cultural acceptability • memorability • credibility • interest-arousing
Legal and ethical requirements may include:	• legislation, including occupational health and safety legislation • regulations • codes of practice • ethical principles • policies and guidelines • society's expectations • cultural expectations and influences • social responsibilities eg protection of children, environmental issues

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria • Knowledge of measurement tools for pre-testing advertisements
Underpinning Knowledge* * At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • Techniques for evaluating advertising effectiveness • Advertising objectives • Legal and ethical requirements • Advertising, creative and media briefs • Media options • Corrective action
Underpinning Skills	• Literacy skills to interpret evaluation requirements, legal and ethical requirements • Communication including questioning, clarifying and reporting • Numeracy skills for analysing numerical and other data and drawing conclusions • Evaluation skills • Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement

- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package

- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment

- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 3	Level 2	Level 2	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to pre-test the effectiveness of an advertisement

- **Communicating ideas and information** – to recommend changes to improve an advertisement

- **Planning and organising activities** – to evaluate the pilot of the advertisement

- **Working with teams and others** – to pilot the advertisement

- **Using mathematical ideas and techniques** – to analyse pre-test data

- **Solving problems** – to improve or correct an advertisement

- **Using technology** – to compare data, if necessary and interpret results

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBADV403A   Monitor advertising production

Unit Descriptor   This unit covers monitoring and reporting on pre-production, production and post-production work.

This unit is related to BSBADV603A Manage advertising production.

Competency Field   Business Development

Element	Performance Criteria
1. Oversee pre-production work	1.1 *Specifications*, schedule, budget, supplier/s and resource requirements are confirmed for pre-production activities
	1.2 Pre-production activities are monitored against scheduling and budgetary requirements and likely overruns reported for action and approval in accordance with organisational policy and procedures
	1.3 The effect of a delay in one aspect of pre-production on the rest of the process is estimated and action to re-schedule activities to meet the pre-production schedule is recommended for approval in accordance with organisational policy and procedures
2. Oversee production processes	2.1 Specifications, *production schedule*, budget, supplier/s and resource requirements are confirmed
	2.2 Progress is monitored in relation to the production schedule, likely variations are identified and approvals gained in accordance with organisational policy and procedures
	2.3 Variations from production budget allocations are identified and approvals gained in accordance with organisational policy and procedures
3. Monitor *post-production* processes	3.1 Specifications, schedule, budget, supplier/s and resource requirements are confirmed for post-production activities
	3.2 Post-production activities are monitored against scheduling and budgetary requirements and likely variations reported for action and approval in accordance with organisational policy and procedures

Element	Performance Criteria
4. Produce monitoring reports	4.1 Monitoring reports provide details of progress for pre-production, production and post-production activities
	4.2 Monitoring reports meet organisational requirements in terms of language, format, content, and level of detail
	4.3 Monitoring reports are provided in the required timeframe

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
Pre-production work may include:	• receipt and review of advertising copy
	• receipt of visual elements and layout
	• artwork
	• graphics
	• scripts
	• music
	• storyboards
	• set construction
	• rehearsals

Range Statement

Printing specifications may include:	• art reproduction:
	• photography
	• line art
	• halftones
	• screens
	• colour reproduction:
	• spot colour
	• process colour
	• colour separation
	• computerised colour reproduction
	• colour register/s
	• typesetting
	• composition

Print production processes may include:

- letterpress
- offset lithography
- rotogravure
- flexography
- silk screen
- desktop publishing
- inkjet printing
- computer software programs
- pre-print production processes

Electronic production processes may include:

- film
- video
- sound recording
- live recording
- website involving sound, graphics, animation

Production schedule may include:

- pre-production, production and post-production work
- print
- film or video shooting
- sound recording
- website development

Post-production work may include:

- assembling scenes
- sound mixing
- editing
- dialogue synchronisation

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence

- Integrated demonstration of all elements of competency and their performance criteria
- monitoring reports for pre-production, production and post-production
- reasons for recommendations to re-schedule activities in the event of production delays

Underpinning Knowledge*

* At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Production process for radio, television and cinema
- Print production process
- Website production process
- Role/s of production personnel

Underpinning Skills

- Literacy skills to read schedules and write reports
- Communication including questioning, clarifying and reporting
- Numeracy skills to read budgets and compare actual versus budgeted expenditure
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement

- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package

- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment

- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

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Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 3	Level 2	Level 3	Level 1	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to confirm specifications, schedules and budgets

- **Communicating ideas and information** – to ensure suppliers know what is required when

- **Planning and organising activities** – to re-schedule production activities in the face of delays

- **Working with teams and others** – to ensure production proceeds according to plan

- **Using mathematical ideas and techniques** – to monitor budgets and schedules

- **Solving problems** – to estimate the effect of delays on other parts of the process and recommend solutions

- **Using technology** – for budgeting, scheduling and report writing if required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

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BSBADV404A   Schedule advertisements

Unit Descriptor   This unit covers preparation and costing of media schedules, booking advertising time/space and lodgment of advertisements.

Competency Field   Business Development

Element	Performance Criteria
1. Confirm advertising and media requirements	1.1 The availability of the completed advertisement is confirmed
	1.2 The chosen *media* and *media vehicle/s* are identified from the media plan and confirmed
	1.3 The timing for public release of the advertisement is confirmed
	1.4 The budget allocation per medium per advertising period is confirmed
2. Prepare and cost the media schedule	2.1 The duration and *timing* of the media schedule meet the requirements of the media plan
	2.2 *Distribution* of messages over the duration of the schedule meets the requirements of the media plan
	2.3 The media schedule identifies the number, size / length and placement / timing of advertisements in accordance with the media plan
	2.4 Costs are negotiated with media vehicles and variations from the budget in costs per medium per advertising period are reported and approvals gained to proceed
	2.5 Changes to the schedule required by unforeseen problems with media vehicle/s are negotiated and approvals gained in accordance with organisational policy and procedures
	2.6 Overall costing of the media schedule meets budgetary requirements
3. Book advertising time / space and lodge advertisements	3.1 Booking procedures are followed in accordance with organisational policy and practice
	3.2 Advertisements are lodged to meet the deadline requirements of the media vehicle/s in accordance with organisational procedures

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
Media may include:	• television
	• radio
	• cinema
	• the press
	• billboards
	• video
	• video games
	• videotext
	• cable and satellite television
	• sponsorship
	• direct mail
	• direct response
	• point-of-sale
	• sales literature
	• sales promotion
	• exhibitions and trade fairs
	• aerial advertising
A media vehicle for 'above the line' media is:	• a particular publication or program in a class of media eg *The Western Australian* and the *Melbourne Age* are both media vehicles in the newspaper 'class'

Range Statement

Media vehicles for 'below the line' media are:	• often not ready-made as they are in the case of 'above the line' media eg. for direct mail the vehicle is constructed each time the medium is used and is defined by two elements - the delivery system and the distribution list • point-of-sale advertising uses a variety of media vehicles such as banners, product display racks, spruikers, permanent (lighted) signs
Timing may include:	• continuous advertising throughout the year • seasonal advertising eg cough medicine, suntan lotion • pre-launch advertising • pre-sale advertising
Distribution of advertising may include:	• evenly spread over the time schedule • in waves, with heavy advertising followed by light or no advertising

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria • Dealing with contingencies, such as cost variations and scheduling difficulties
Underpinning Knowledge* * At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • Organisation's policy and procedures • Media • Media vehicles • Deadlines

Evidence Guide

Underpinning Skills	• Literacy skills to identify information from a media plan and prepare a media schedule
	• Communication including questioning, clarifying, negotiating and gaining approvals
	• Numeracy skills for budgeting, costing and scheduling
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 1	Level 2	Level 2	Level 2	Level 2	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to determine the requirements of the media plan
- **Communicating ideas and information** – to negotiate costs with media vehicle/s
- **Planning and organising activities** – to schedule advertisements
- **Working with teams and others** – to deal with contingencies
- **Using mathematical ideas and techniques** – for budgeting, costing and scheduling
- **Solving problems** – to deal with variations of costs from budget
- **Using technology** – for budgeting and scheduling if required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBADV501A   Develop a creative concept

Unit Descriptor   This unit covers development of the creative concept for an advertisement or promotion.

Consider co-assessment with BSBADV502A Write persuasive copy and BSBADV504A Create advertisements.

Competency Field   Business Development

Element	Performance Criteria
1. Read and absorb background information	1.1 Information about the consumer, the product, the market, the competition and the *target audience* is studied, and ideas and associations recorded
	1.2 The direction indicated by purpose and objectives is identified from the creative brief
	1.3 *Legal and ethical constraints* are identified for the proposed use of the concept
2. Develop a creative concept	2.1 A *central idea* is developed that communicates the key features of the product, service or idea and makes clear for whom the advertisement is meant
	2.2 The central idea has originality and impact and sets apart the product, service or idea being advertised, from the competition and from competitor's advertisements
	2.3 A range of *techniques for expressing the central idea* is considered and one or a combination is chosen to suit the product and the audience
3. Evaluate a creative concept	3.1 The creative concept is relevant to, and does not obscure the product or service
	3.2 The creative concept meets the requirements of the creative brief
	3.3 The creative concept and the technique/s for expressing it comply with legal and ethical requirements

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Information on the target audience may include:	• demographics • lifestyle • social and cultural factors • values or attitude factors • existing product usage
Legal and ethical constraints may include:	• legislation • regulations • codes of practice • ethical principles • policies and guidelines • society's expectations • cultural expectations and influences • social responsibilities eg protection of children, environmental issues
The central idea in an advertisement is:	• the verbal or visual device used to present the content to the reader, listener or viewer of the advertisement • The central idea may be • visual (illustration) • verbal (text or headline) • combination of visual and verbal
Central ideas may include:	• testimonials • celebrities • continuing characters • product uses • recipes

Range Statement

- analogy and association
- exaggerated situations
- fantasy
- photographic tricks or special effects
- case histories
- slice-of-life situations
- demonstrations

Techniques for expressing the central idea may include:

- use of humour
- use of a presenter
- animation
- live action
- comparative advertising
- use of colour and/or black and white
- music
- sound effects
- signature elements eg slogans, logotypes, package

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence

- Integrated demonstration of all elements of competency and their performance criteria
- Rationale for the creative concept and the technique/s for expressing the central idea

Underpinning Knowledge*

*   At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Organisation's business structure, products and services
- Purposes of advertising
- Advertising objectives
- Creative strategies such as brainstorming, free association, making a variety of lists based on different attributes
- Legal and ethical requirements

Evidence Guide

Underpinning Skills	• Literacy skills to identify background information, to write in a range of styles for different audiences and to interpret legal and ethical requirements
	• Communication including questioning and clarifying
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 3	Level 2	Level 2	Level 1	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to immerse oneself in background information

- **Communicating ideas and information** – through the generation of a creative concept

- **Planning and organising activities** – to choose technique/s for expressing the central idea

- **Working with teams and others** – to evaluate a proposed concept

- **Using mathematical ideas and techniques** – to compare and contrast attributes

- **Solving problems** – by using creative strategies to overcome blocks and develop a creative concept

- **Using technology** – to record or generate ideas if required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBADV502A   Write persuasive copy

Unit Descriptor   This unit covers interpretation of a creative brief and evaluating a range of creative options in order to write persuasive copy.

Consider co-assessment with BSBADV501A Develop a creative concept and BSBADV504A Create advertisements.

Competency Field   Business Development

Element	Performance Criteria
1. Interpret a creative brief	1.1 The *central idea* or creative concept, the technique/s for expressing it and the media are confirmed
	1.2 The *content* and *supporting information* is identified and checked for accuracy and completeness
	1.3 The time schedule and budget requirements for creating the advertisement/s are confirmed
	1.4 *Legal and ethical constraints* are identified
2. Evaluate creative options	2.1 Design and copy options are evaluated against the requirements of the creative brief
	2.2 Option/s are selected which enable the required information and image to be communicated within time and budgetary requirements
3. Prepare persuasive *copy*	3.1 Copy has originality and impact and sets apart the product, service or idea being advertised, from the competition and from competitor's promotional material
	3.2 Copy communicates the required image, features / benefits of the product, service or idea
	3.3 Copy meets the requirements of the creative brief in terms of information, format, language, writing style, and level of detail
	3.4 Copy is produced on time and within budget
	3.5 Copy complies with legal and ethical requirements

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
A creative brief	• provides direction to the creative specialist/s and unifies the creative elements of a campaign visually and verbally (especially where there are a number of advertisements using different media)
The central idea in an advertisement is:	• the verbal or visual device used to present the content to the reader, listener or viewer of the advertisement • the central idea may be • visual (illustration) • verbal (text or headline) • combination of visual and verbal
Central ideas may include:	• testimonials • celebrities • continuing characters • product uses • recipes • analogy and association • exaggerated situations • fantasy • photographic tricks or special effects • case histories • slice-of-life situations • demonstrations

Range Statement

Advertising content:	• is the information to be communicated to the audience
	• content may include:
	• features of the product / service
	• (brand) image factors
	• competitive advantages
	• where the product may be obtained, price, colour etc
Supporting information may include:	• evidence to support the claimed benefit
	• requirement to specify the target audience
	• purchasing information
	• reassurances for existing users
Legal and ethical constraints may include:	• legislation
	• regulations
	• codes of practice
	• ethical principles
	• policies and guidelines
	• society's expectations
	• cultural expectations and influences
	• social responsibilities eg protection of children, environmental issues
Copy consists of:	• the words used in print and broadcast advertising
Copy may include:	• for print:
	• display copy
	• body copy
	• headlines
	• subheads
	• captions
	• overlines
	• underlines
	• taglines
	• for broadcast
	• instructions and descriptions
	• production and technical information
	• sound sources and effects
	• message content

Range Statement

- speech patterns and language style
- action cues

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria • Supporting reasons for design and copy options
Underpinning Knowledge* * At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • Legal and ethical requirements • Organisation's policy and procedures • Organisation's products and services • Organisation's budget • Creative briefs
Underpinning Skills	• Literacy skills to identify company and product information and to write in a range of styles for different audiences • Communication including questioning, clarifying, reporting • Creative skills • Writing skills • Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 3	Level 2	Level 1	Level 1	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to interpret the creative brief
- **Communicating ideas and information** – through written copy
- **Planning and organising activities** – to compare a range of creative options
- **Working with teams and others** – to clarify the creative brief
- **Using mathematical ideas and techniques** – to keep to budget and schedule
- **Solving problems** – to create impact and originality when writing copy
- **Using technology** – for writing and recording if required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBADV503A   Coordinate advertising research

Unit Descriptor   This unit covers the conduct of primary and secondary advertising research in order to test advertising themes and ideas.

This unit is related to BSBADV401A Profile a target audience.

Competency Field   Business Development

Element	Performance Criteria
1. Assess advertising research requirements	1.1 *Information about the consumer, the product and the market environment* is analysed and the need for further research identified and justified
	1.2 Creative concepts are assessed and the need for *concept testing* is determined and justified
	1.3 Media options and scheduling are assessed and the need for media research is determined and substantiated
	1.4 *Legal, ethical and cultural considerations* for advertising research are identified and assessed to determine their impact on research methods
2. Select research method/s	2.1 Research budget and time frame are confirmed and used in the selection process
	2.2 *Primary* and *secondary* research methods are assessed for their capacity to provide the required information
	2.3 Method/s selected to pre-test advertising are the most likely to provide the required information on time and within budget
	2.4 A research brief is prepared that specifies research objectives and method/s, budget, time schedule and reporting requirements
3. Utilise advertising research findings	3.1 Research results are analysed and their impact on *advertising strategies,* budgets and timelines identified
	3.2 Advertising strategies, budgets and timelines are adjusted to reflect research findings
	3.3 Revised advertising strategies meet *legal and ethical requirements* and the requirements of the advertiser

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Information about the consumer, the product and the market environment may include:	• demographics • buyer behaviour • existing customers and product usage • product brand, characteristics, and packaging • competitive advantage • product and brand image • pricing • distribution channels • problems and opportunities facing the product • results of past advertising for the product • target market • competitive factors • economic, social and cultural factors • values or attitude factors
Concept testing:	• presents material eg a short product description, drawing or dummy advertisement, to evaluate consumer reaction
Legal, ethical and cultural considerations may include:	• privacy • confidentiality • cultural sensitivity

Range Statement

Primary research:	• is original research carried out to gather information for a specific purpose
	• sources of primary research may include:
	• observation
	• sampling
	• quota sampling
	• interviews (face-to-face and telephone)
	• indirect research such as depth or focus group interviews, projective questioning, association tests
	• surveys
	• questionnaires
	• panel research
	• group interviews
	• retail audits (to determine brand share)
	• attitude surveys
	• specialised research eg 'mystery shoppers'
	• experiments or market testing on a segment of the market
Secondary research:	• is also termed desktop research and makes use of data that has already been collected
	• may be cheaper than primary research
	• may not be entirely relevant
	• may not be current
	• may be difficult to confirm accuracy
	• sources of secondary research may include:
	• internal company sources, such as sales or distribution figures, financial information, cost analyses
	• external sources, such as published government statistics, polls published by advertising and media companies, chambers of commerce data, university databases, data held by research organisations
Research standards may include:	• interviewer standards
	• measures to ensure validity and reliability
	• design rules for questionnaires
	• protocols to minimise or eliminate bias

Range Statement

Analysis may include:	• application of statistical methods
	• mathematical calculations
	• critical analysis
Research relationships/ findings may include:	• facts
	• issues
	• patterns
	• interrelationships
	• trends
Advertising strategies may include:	• identification of advertising purpose and objectives
	• target audience strategies
	• communication objectives
	• creative and media strategies
Legal and ethical requirements may include:	• legislation
	• regulations
	• codes of practice
	• ethical principles
	• policies and guidelines
	• society's expectations
	• cultural expectations and influences
	• social responsibilities eg protection of children, environmental issues
Occupational health and safety issues may include:	• safety of researcher and public during research activities
	• remote / isolated work procedures

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Evidence to be provided to demonstrate knowledge of a range of research methodologies and their suitability for researching advertising factors
Underpinning Knowledge* * At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Organisation's policy and procedures
	• Organisation's budget
	• Research methods
	• Elements of an advertising brief
	• Legal and ethical requirements
	• Data analysis
Underpinning Skills	• Literacy skills to interpret legal and ethical requirements and for preparing a research brief and report
	• Communication skills for conducting research
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
	• Analytical skills to interpret data and evaluate how it may be utilised
	• Numeracy skills for data collation and analysis
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 3	Level 2	Level 2	Level 2	Level 3	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – Collecting research data, analysing it and organising it into a usable format

- **Communicating ideas and information** – to prepare a research brief and a report of research findings

- **Planning and organising activities** – and scheduling research to meet objectives in a research plan

- **Working with teams and others** – to confirm information and assess the need for research

- **Using mathematical ideas and techniques** – to analyse quantitative data and draw conclusions

- **Solving problems** – relating to data collection as they arise, and finding solutions that maintain the validity and reliability of the research

- **Using technology** –if necessary, for data analysis and reporting

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBADV504A   Create advertisements

Unit Descriptor   This unit covers creation of advertisements that communicate the key features of the product, service or idea to the consumer.

Consider co-assessment with BSBADV501A Develop a creative concept and BSBADV502A Write persuasive copy.

Competency Field   Business Development

Element	Performance Criteria
1. Interpret a creative brief	1.1 The *central idea* or creative concept, the technique/s for expressing it and the media are confirmed
	1.2 The *advertising content* and *supporting information* is identified and checked for accuracy and completeness
	1.3 The time schedule and budget requirements for creating the advertisement/s are confirmed
	1.4 *Legal and ethical constraints* are identified
2. Create a print advertisement	2.1 The *elements of* the *print advertisement* are determined and produced to communicate the required image, features and benefits of the product or service
	2.2 Each element of the print advertisement is sized and positioned to achieve balance and focus for the advertisement
	2.3 Typeface selections suit the product and the central idea of the advertisement, and the *layout* balances white space and margins
	2.4 The layout of the advertisement unifies the elements, attracts the reader to the *focal point* and guides the reading sequence
	2.5 The print advertisement meets the requirements of the advertising brief and meets legal and ethical requirements
3. Create a radio advertisement	3.1 The length, pace and *format* for the radio advertisement are determined in accordance with the creative brief and the allocated budget
	3.2 The content of the opening, middle and close of the radio advertisement is determined to create impact, introduce the central idea, provide support for key product benefits, and information to facilitate consumer action
	3.3 Scripts are prepared to meet the *requirements of the producer and performer/s* and the allotted time
	3.4 The radio advertisement meets the requirements of the advertising brief and meets legal and ethical requirements

Element	Performance Criteria
4. Create a television or cinema advertisement	4.1 The length, pace and *format* for the advertisement are determined in accordance with the creative brief and the allocated budget
	4.2 Scripts and storyboards are prepared to record the visual plan of the advertisement and identify *creative elements* that meet the requirements of the creative brief
	4.3 The advertisement attracts attention and sustains interest through coordination of action and motion visual effects, with audio to support the visual image/s
	4.4 The advertisement meets the requirements of the advertising brief and meets legal and ethical requirements
5. Create a website or e-commerce advertisement	5.1 Copy and design elements are determined and produced to communicate the required image, features and benefits of the product or service
	5.2 Each element of the advertisement is sized and positioned to achieve balance and focus for the advertisement
	5.3 Typeface selections suit the product and the central idea of the advertisement, and the *layout* balances white space and margins
	5.4 Site map, navigation buttons, frames and multiple pages are designed for ease of use
	5.5 Sound, animation and graphics do not distract from the content of the advertisement
	5.6 The advertisement meets the requirements of the advertising brief and meets legal and ethical requirements

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice

Range Statement

A creative brief:	• provides direction to the creative specialist/s and unifies the creative elements of a campaign visually and verbally (especially where there are a number of advertisements using different media)
The central idea in an advertisement is:	• the verbal or visual device used to present the content to the reader, listener or viewer of the advertisement
	• the central idea may be
	• visual (illustration)
	• verbal (text or headline)
	• combination of visual and verbal
Central ideas may include:	• testimonials
	• celebrities
	• continuing characters
	• product uses
	• recipes
	• analogy and association
	• exaggerated situations
	• fantasy
	• photographic tricks or special effects
	• case histories
	• slice-of-life situations
	• demonstrations
Advertising content:	• is the information to be communicated to the audience
	• Advertising content may include:
	• features of the product / service
	• (brand) image factors
	• competitive advantages
	• where the product may be obtained, price, colour etc
Supporting information may include:	• evidence to support the claimed benefit
	• requirement to specify the target audience
	• purchasing information
	• reassurances for existing users

Range Statement

Legal and ethical constraints may include:	• legislation, including occupational health and safety legislation
	• regulations
	• codes of practice
	• ethical principles
	• policies and guidelines
	• society's expectations
	• cultural expectations and influences
	• social responsibilities eg protection of children, environmental issues
Advertising copy consists of:	the words used in print and broadcast advertising
Advertising copy may include:	• for print:
	• display copy
	• body copy
	• headlines
	• subheads
	• captions
	• overlines
	• underlines
	• taglines
	• for broadcast
	• instructions and descriptions
	• production and technical information
	• sound sources and effects
	• message content
	• speech patterns and language style
	• action cues

Range Statement

Elements of a print advertisement may include:	• headlines
	• copy
	• visuals
	• captions
	• slogans
	• borders
	• coupons
	• logos
	• signatures
	• boxes
	• colour
	• shading
	• mandatory product or service information
Layout is:	• a design showing the size and spatial arrangement of the elements of a print advertisement
Focal point is:	• the place where readers enter the advertisement (natural tendency being upper portion, left of centre)
Format for radio advertisements may include:	• dramatised radio advertisement
	• dialogue radio advertisement
	• 'straight' radio advertisement
	• 'gimmick' radio commercial
Requirements of the producer and performer/s may include:	• detailed message content
	• words to be spoken
	• manner of delivery
	• audio direction
	• instructions
	• cues
	• descriptions
	• coordination of music and sound effects with spoken words

Range Statement

Creative elements may include:
- audio details
- film and video details
- key frames
- action scenes
- camera shots
- action progression
- interaction of audio and video
- composition of film and video shots
- location
- set
- props
- talent
- music
- voices
- sound effects
- lighting effects
- graphics effects

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence
- Integrated demonstration of all elements of competency and their performance criteria
- Evidence of reasoning / rationale for creative decisions to be included due to the subjective nature of evaluating the quality of the outputs (advertisements)

Underpinning Knowledge*

* At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Organisation's products and services
- Purposes of advertising
- Different advertising approaches for different markets
- Advertising briefs
- Types of advertising objectives and the strategies to address them

Evidence Guide

- Creative elements in print and broadcast advertisements
- Consumer behaviour
- Influences on buyer behaviour
- Legal and ethical requirements

Underpinning Skills
- Literacy skills to interpret requirements and write for a variety of audiences and purposes
- Communication skills including negotiation
- Creative writing skills
- Scriptwriting skills
- Visual and design skills
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications
The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance
In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 3	Level 3	Level 3	Level 2	Level 2	Level 3	Level 2

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to write advertising copy and scripts that interpret and address a creative brief

- **Communicating ideas and information** – through print, radio, television or cinema advertisements

- **Planning and organising activities** – in preparing advertisements

- **Working with teams and others** – to manage the range of personnel involved in making an advertisement

- **Using mathematical ideas and techniques** – to comply with time and budgetary constraints

- **Solving problems** – while balancing all the competing elements in an advertisement

- **Using technology** – to create advertisements

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBADV505A   Evaluate and recommend 'above the line' media options

Unit Descriptor   This unit covers evaluation of '*above the line*' media in order to match media options to the target audience.

Consider co-assessment with BSBADV506A Evaluate and recommend 'below the line' media options and BSBADV507A Develop a media plan.

Competency Field   Business Development

Element	Performance Criteria
1. Evaluate the use of *broadcast media* for advertising	1.1 The advantages and disadvantages of television advertising are identified for a product or service
	1.2 The *advantages* and *disadvantages of radio advertising* are identified for a product or service
	1.3 The advantages and disadvantages for advertising a product or service using other broadcast media are identified
	1.4 The *characteristics* of broadcast *media* that match the requirements of the advertising brief for the product or service are determined
2. Evaluate the use of *print media* for advertising	2.1 Different types of *press* are identified for advertising a product or service and the *advantages* and *disadvantages* of each are determined
	2.2 The advantages and disadvantages of billboard and poster advertising for a product or service are identified
	2.3 The characteristics of print media that match the requirements of the advertising brief for the product or service are determined
3. Evaluate the use of cinema and video as advertising media	3.1 The *advantages* and *disadvantages of cinema advertising* for a product or service are identified
	3.2 The characteristics of cinema advertising that match the requirements of the advertising brief for the product or service are determined
	3.3 The *advantages* and *disadvantages of video advertising* for a product or service are identified
	3.4 The characteristics of video advertising that match the requirements of the advertising brief for the product or service are determined

Element	Performance Criteria

4. Evaluate the use of sponsorship as an advertising medium

4.1 The *advantages* and *disadvantages of* using *sponsorship* for advertising a product or service are identified

4.2 The characteristics of advertising sponsorships that match the requirements of the advertising brief for the product or service are determined

5. Evaluate the use of the Internet as an advertising medium

5.1 The *advantages* and *disadvantages of Internet advertising* for a product or service are identified

5.2 The characteristics of Internet advertising that match the requirements of the advertising brief for the product or service are determined

6. Recommend 'above the line' media for a target audience

6.1 'Above the line' media are compared to assess their ability to address target audience preferences

6.2 A primary advertising medium is recommended that meets target audience preferences

6.3 If supplementary media are required their characteristics complement those of the primary medium

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:
- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

'Above the line' media are:
- those that are operated independently ie media where the advertiser has full control over the content of the advertisement but no control over the media itself
- 'Above the line' media may include:
  - television
  - radio
  - cinema
  - the press

Range Statement

- billboards and posters
- video
- video games
- videotext
- cable and satellite television
- sponsorship

Broadcast media may include:
- television
- radio
- cable and satellite television
- videotext

Advantages of television advertising may include:
- reaches a mass market
- ability to project directly into the home
- relaxed and possibly more receptive audience
- use of sophisticated visuals
- use of colour, sound and atmosphere
- use of well-known personalities
- repetition of the advertisement over time
- regional and national exposure possible
- retailers respond by increasing stock in expectation of demand
- can be used in conjunction with other media more suited to providing fuller information

Disadvantages of television advertising may include:
- difficulty in targeting a specific market
- vulnerability to being turned off during a commercial break
- costly compared with other media
- losing prime slot/s if other advertisers are willing to pay more

Advantages of radio advertising may include:
- ability to aim advertising at specific audiences
- ability to time advertising to coincide with consumers driving to and from work
- portability of the medium eg its use during train and air travel and at work
- used by people without access to television and/or print media

Range Statement

Disadvantages of radio advertising may include:

- difficulty in creating an image for a product that needs to be identified visually in a retail store
- difficulty in assessing success of advertising

Media characteristics may include:

- audience
- exposure eg reach versus frequency
- creative characteristics
- minimum cost of entering the medium
- production requirements
- merchandising value
- competitive advertising situation
- media environment eg high reader/viewer interest versus ad clutter

Print media may include:

- national newspapers
- regional and local newspapers
- free newspapers
- general interest and specialist magazines
- technical and trade journals
- professional journals
- inserts
- directories such as yellow pages or business directories

Advantages of press advertising may include:

- cheapness compared to other media options
- reaches a mass market but can be targeted eg motor vehicles, sportswear
- may be kept and read more than once
- allows detailed information to be provided about products and services
- portability – can be read anywhere
- impact is easily measured
- statistics can identify number of copies sold and readership in terms of occupation, socio-economic group, age, gender etc

Range Statement

Disadvantages of press advertising may include:	• short life of newspapers
	• need for eye-catching advertisements especially in publications with high ad clutter
	• poor print quality of some publications which results in a poor reproduction of the ad
	• literacy skills of some consumers may exclude a proportion of the market
Advantages of billboard and poster advertising may include:	• exposed to a mass audience
	• relatively cheap compared with other media options
	• eye-catching because of their size or location
	• transit advertising uses smaller posters located in or on taxis, buses, bus shelters and seats
Disadvantages of billboard and poster advertising may include:	• difficulty in targeting a specific market
	• damage due to weather limits life
	• only effective in daylight hours
	• popular sites may be difficult to acquire
	• literacy skills of some consumers may exclude a proportion of the market
Advantages of cinema advertising may include:	• use of sophisticated visuals
	• use of colour, sound and atmosphere
	• use of well-known personalities
	• repetition of the advertisement over time
	• big screen exposure
	• regional and national exposure
	• captive audience in that it can't be turned off
	• advertisement may be matched to a film
	• particular age groups may be targeted
	• suited to local suppliers
	• cost effective compared with television
Disadvantages of cinema advertising may include:	• advertising can be avoided by arriving late
	• declining popularity of cinemas in some areas
	• general need for a longer time span to achieve the result

Range Statement

Advantages of video advertising may include:	• allows for targeting in relation to age group and sometimes gender • has some of the advantages of television in terms of creative appeal • suited to advertising like products (other videos, video games)
Disadvantages of video advertising may include:	• advertising can be avoided by fast forwarding • advertising doesn't reach a mass market
Advantages of sponsorship may include:	• allows for targeting eg sportswear • takes advantage of the image of popular personalities and events
Disadvantages of sponsorship advertising may include:	• costly in comparison to other media options
Advantages of Internet advertising may include:	• reciprocal linking of web sites • allows for targeting in relation to some products • suited to advertising like products • web site design may use colour, sound and exciting graphics • ability to provide information to the same extent as print media • web site traffic can be measured • advertising is cost effective but with the same drawbacks as other direct mail advertising
Disadvantages of Internet advertising may include:	• market restricted to those with Internet access • passive rather than active – consumers must choose to access a site and read the advertisements • Internet sites may be hard to find – vulnerable to poor search engine design • literacy skills of some consumers may exclude a proportion of the market

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Supporting reasons for choices made, due to the subjective nature of judging selection of media options
Underpinning Knowledge*	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
* At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.	• Organisation's products and services
	• Consumer behaviour
	• Legal and ethical requirements
	• Types of media
	• Characteristics of 'above the line' media
	• Types of advertising strategies
	• Data analysis and matching techniques
Underpinning Skills	• Literacy skills to interpret the characteristics of different media and match them to the requirements of the advertising brief
	• Evaluation skills for comparing and weighing advantages of one medium over another, and matching characteristics with media requirements
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills

Evidence Guide

elaborated in the Evidence Guide, and within the scope as defined by the Range Statement

- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package

- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment

- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 3	Level 2	N/A	Level 2	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – on 'above the line' media options and organising the information for comparison with media requirements

- **Communicating ideas and information** – on the outcomes of the evaluation and selection of media options

- **Planning and organising activities** – N/A

- **Working with teams and others** – to collect and evaluate information

- **Using mathematical ideas and techniques** – to compare and contrast data, evaluate advantages and disadvantages, and match requirements to objectives

- **Solving problems** – related to choice of the appropriate media or media mix for a product or service

- **Using technology** – for analysis, if necessary, and accessing electronic media to assist in evaluation

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBADV506A   Evaluate and recommend 'below the line' media options

Unit Descriptor   This unit covers evaluation of '*below the line*' media in order to match media options to the target audience.

Consider co-assessment with BSBADV505A Evaluate and recommend 'above the line' media options and BSBADV507A Develop a media plan.

Competency Field   Business Development

Element	Performance Criteria
1. Evaluate the use of *direct mail* as an advertising medium	1.1 The advantages and disadvantages of direct mail advertising for a product or service are identified
	1.2 The *media characteristics* of direct mail advertising that match the requirements of the advertising brief for the product or service are determined
2. Evaluate the use of *direct response* as an advertising medium	2.1 The advantages and disadvantages of direct response advertising for a product or service are identified
	2.2 The media characteristics of direct response advertising that match the requirements of the advertising brief for the product or service are determined
3. Evaluate the use of *point-of-sale, sales literature and promotion* advertising media	3.1 The advantages and disadvantages of point-of-sale advertising for a product or service are identified
	3.2 The characteristics of point-of-sale advertising that match the requirements of the advertising brief for the product or service are determined
	3.3 The *advantages* and *disadvantages of sales literature and sales promotion* advertising media for a product or service are identified
	3.4 The characteristics of sales literature and sales promotion advertising that match the requirements of the advertising brief for the product or service are determined
4. Evaluate the use of other 'below the line' advertising media	4.1 The *advantages* and *disadvantages of trade shows and exhibitions* as advertising media for a product or service are identified
	4.2 The characteristics of trade shows and exhibitions that match the requirements of the advertising brief for the product or service are determined
	4.3 The *advantages* and *disadvantages of aerial advertising* for a product or service are identified

Element	Performance Criteria
	4.4 The characteristics of aerial advertising that match the requirements of the advertising brief for the product or service are determined
5. Recommend 'below the line' media for a target audience	5.1 'Below the line' media are compared to assess their ability to address target audience preferences
	5.2 A primary medium for advertising a product or service is recommended that meets target audience preferences
	5.3 If supplementary media are required their characteristics complement those of the primary medium

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
'Below the line' media are:	• those that are usually paid no commission and do not incur percentage costs; media which carries no other message than the advertising
	• 'Below the line' media may include:
	• direct mail
	• direct response
	• point-of-sale
	• sales literature
	• sales promotion
	• exhibitions and trade fairs
	• aerial advertising
Direct mail is:	• an advertising medium that uses individually addressed messages directed, usually through the mail, to prospective consumers

Range Statement

Advantages of direct mail advertising may include:	• may be tailored to a particular target audience
	• may be personalised
	• makes a direct appeal to the consumer
	• may use of a variety of approaches ie different content or appeal
	• use of graphics/visuals
	• allows repetition of the advertisement over time
	• local, regional and national exposure possible
	• may be used to provide full information
Disadvantages of direct mail advertising may include:	• difficulty in obtaining or buying mailing lists
	• cost of producing mailing lists
	• dependent on a range of exceptional skills: writing, layout, creating a 'hook' for the reader
	• may be discarded without being read
	• relatively costly compared with other media
Media characteristics may include:	• audience
	• distribution of exposures eg reach versus frequency
	• creative characteristics
	• minimum cost of entering the medium
	• production requirements
	• merchandising value
	• competitive advertising situation
	• media environment eg high reader/viewer interest versus ad clutter
Direct response advertising is:	• a method used to advertise a product or service (on television, radio, in the press, catalogues, by telemarketing etc) and which asks the consumer to respond directly by:
	• telephone
	• mail
	• e-mail
	• cutting out and returning a coupon
	• returning a reply-paid card
	• placing an order (accompanied by a credit card number)
	• Direct response advertising may include:
	• one-step advertising where the communication completes the sale (often by credit card)

Range Statement

- two-step advertising where the communication is the first step which paves the way for the sale

Advantages of direct response advertising include:

- reaching a mass audience
- targetting a narrow audience
- reaching directly into the home
- appealing directly to the consumer
- accessing the 'armchair shopper'
- using a variety of media vehicles

Disadvantages of direct response advertising may include:

- the need to define narrow market segments and tailor advertising content, media and media vehicles to reach the audience
- poor targeting if the advertising content, media and media vehicle are not appropriate

Point-of-sale advertising is:

- used to attract customers to products displayed in retail outlets
- Point-of-sale advertising may include:
  - mobiles
  - posters
  - displays
  - banners
  - illuminated signs
  - display stands and bins
  - shelf tickets

Sales literature is:

- produced to provide information about products or services
- sales literature may include:
  - catalogues with illustrations and descriptions
  - brochures
  - leaflets
  - price lists
  - order forms
  - diaries
  - stationery
  - calendars

Range Statement

Sales promotions may include:	• loyalty programs: • special offers • money-off coupons • competitions • free samples
Advantages of point-of-sale, sales literature and sales promotion advertising may include:	• reaching consumers while they are in the process of shopping • influencing unplanned purchases (may influence brand choice even if purchase of the product is planned) • flexibility in colour, shape and dimensions • linking to advertising of the product or service in another medium (image, illustrations, slogans) • value of linking point-of-sale and sales promotion materials
Disadvantages of point-of-sale, sales literature and sales promotion advertising may include:	• in-store advertising holds consumer attention for only a few seconds • advertising materials may be wasted • requirements of the retailer must be met if materials are to be used (the retailer may find them inappropriate to the size or image of the outlet) • money-off coupons are not always popular with retailers • promotions have a limited life span and consumers revert to their usual brand when the promotion ends • judging level of demand for promotional products is difficult and the retailer will lose if over-stocked or under-stocked (irate customers)

Trade shows and exhibitions:	• are used by manufacturers to:
	  • display (and sell) lines to dealers and retailers
	  • enlist dealers to carry a product
	  • get leads for salespeople to follow up later
	  • sell to the public
	• are often restricted to selling to businesses rather than the public

Range Statement

Advantages of trade shows and exhibitions advertising may include:	• targeting to the market • allowing a product to be demonstrated • allows personal contact with the consumer • being effective for distributing information direct to the target market • good public relations • enhancing organisation image • keeping the name (or brand) in the public eye • media coverage by press and television
Disadvantages of trade shows and exhibitions advertising may include:	• being costly in terms of resources required, both human and material • proximity of competitors • low attendance at smaller venue • poor stand position / access will affect success
Aerial advertising may include:	• banners trailed behind an aircraft • messages written with a smoke trail, from an aircraft • airship advertising • balloons tethered to the ground or the top of a building • lasers that project ads into the night sky
Advantages of aerial advertising may include:	• being so unusual grabs attention • suitability brand advertising • reaching mass audience
Disadvantages of aerial advertising may include:	• restrictions apply in some locations • suitability for very short messages • not being targeted to a particular audience • being mostly restricted to daylight hours and dependent on the weather • being costly compared with other media options

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Supporting reasons to be provided for choices made, due to the subjective nature of judging the selection of media options

Underpinning Knowledge*	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
* At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.	• Organisation's products and services
	• Consumer behaviour
	• Legal and ethical requirements
	• Types of media
	• Advertising and media briefs
	• Characteristics of 'below the line' media
	• Data analysis and matching techniques

Underpinning Skills	• Literacy skills to interpret the characteristics of different media and match them to the requirements of the advertising brief
	• Evaluation skills for comparing and weighing advantages of one medium over another, and matching characteristics with media requirements
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement

- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package

- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment

- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 3	Level 2	N/A	Level 2	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – on 'below the line' media options and organising the information for comparison with media requirements

- **Communicating ideas and information** – on the outcomes of the evaluation and selection of media options

- **Planning and organising activities** – N/A

- **Working with teams and others** – to collect and evaluate information

- **Using mathematical ideas and techniques** – to compare and contrast data, evaluate advantages and disadvantages, and match requirements to objectives

- **Solving problems** – related to choice of the appropriate media or media mix for a product or service

- **Using technology** – for analysis, if necessary, and accessing electronic media to assist in evaluation

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBADV507A   Develop a media plan

Unit Descriptor   This unit covers interpreting an advertising brief in order to develop a media plan within a given budget.

Consider co-assessment with BSBADV505A Evaluate and recommend 'above the line' media options and BSBADV506A Evaluate and recommend 'below the line' media options.

Competency Field   Business Development

Element   ## Performance Criteria

1. Define media requirements

1.1 The *target audience* is identified from the advertising brief and a detailed *consumer profile* prepared

1.2 The consumer profile uses the same terms as those used to describe media audiences

1.3 *Product market factors* are analysed to determine the *reach* and *frequency* requirements of the advertising

1.4 The *creative requirements* of the advertising message are analysed and the media implications determined

1.5 Media *merchandising requirements* are identified from the advertising brief

1.6 The media budget is confirmed and *legal and voluntary constraints* identified

2. Select the *media*

2.1 Media are selected that target the required audience and/or fulfil merchandising requirements within budget

2.2 Selected media enable the creative requirements of the advertising message to be achieved within budget

2.3 Selected media enable reach and frequency requirements to be met within budget

2.4 Selected media meet legal and ethical requirements

3. Select *media vehicle/s*

3.1 Media vehicle alternatives are identified for each media and their relative merits weighed

3.2 Media vehicle/s are selected to meet media requirements within budget

Element	Performance Criteria
4. Determine the media schedule	4.1 The duration and *timing* of the media schedule meet the requirements of the advertising brief
	4.2 *Distribution* of messages over the duration of the schedule is determined to meet the requirements of the advertising brief
	4.3 Alternative schedules are developed for the advertiser that vary the number, size / length and placement of advertisements possible within the budget
	4.4 A media schedule is finalised that balances the number, size / length and placement of advertisements to the satisfaction of the advertiser
5. Produce a media plan	5.1 The media plan defines the media requirements of the advertising brief and evidence to support each requirement
	5.2 The media plan specifies recommended media and vehicle/s and the rationale for their selection
	5.3 The media plan contains a budget allocation per medium per advertising period
	5.4 The media plan identifies the anticipated impact of the advertising and *measures* to assess its effectiveness

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
Target audience:	• is defined by:
	• demographics
	• lifestyle
	• social and cultural factors
	• values or attitude factors
	• existing product usage

Range Statement

Consumer profile may include:	• demographic information such as age, sex, marital status, number of children, nationality, education, occupation, income, etc
	• psychographic information such as activities, interests, opinions, values, attitudes, lifestyle
Advertising reach is:	• defined as the total number of people who read one or more print issues included in a media schedule during a specified time period
	or
	• the total number of people who heard or viewed one or more of the programs or included in a broadcast media schedule
Advertising frequency is:	• defined as the average number of print media issues read (for those who have read at least one issue) in a print media schedule during a specified time period
	or
	• the average number of programs or station time periods heard or viewed (for those who have heard or viewed at least one) in a broadcast media schedule
Product market factors may include:	• level of involvement eg low involvement routine purchase decisions require high frequency advertising
	• product characteristics eg
	• products that are new, frequently purchased, convenience goods or undifferentiated require high frequency advertising
	• established products, infrequently purchased, or highly differentiated products require greater emphasis on reach
	• message characteristics eg unique, simple or ongoing campaign messages require less frequency while new campaigns, complex messages or 'me- too' advertising require greater frequency
	• competitive situation eg high frequency competitive advertising may require high frequency to be noticed
	• media environment eg with high consumer interest in the medium reach is emphasised; with high ad clutter frequency is emphasised
Creative requirements of the message may include:	• words only
	• pictures or illustrations
	• sound
	• music

Range Statement

- action
- colour
- intrusive medium
- prestigious medium
- local national or international medium
- cluttered or uncluttered medium
- electronic or physical form
- fast production time
- production costs

Merchandising requirements may include:
- identification with a particular local community
- association with a particular media vehicle eg advertising in *Choice* magazine to give the perception of safety and value

Legal and voluntary constraints may include:
- legislation, including occupational health and safety legislation
- regulations
- codes of practice
- ethical principles
- policies and guidelines
- society's expectations
- cultural expectations and influences
- social responsibilities eg protection of children, environmental issues

Media may include:
- television
- radio
- cinema
- the press
- billboards
- video
- video games
- videotext
- cable and satellite television
- Internet
- sponsorship
- direct mail
- direct response
- point-of-sale
- sales literature

Range Statement

- sales promotion
- exhibitions and trade fairs
- aerial advertising

A media vehicle for 'above the line' media is:

- a particular publication or program in a class of media eg *The Western Australian* and the *Melbourne Age* are both media vehicles in the newspaper 'class'

Media vehicles for 'below the line' media are:

- often not ready-made as they are in the case of 'above the line' media

eg

- for direct mail the vehicle is constructed each time the medium is used and is defined by two elements - the delivery system and the distribution list
- point-of-sale advertising uses a variety of media vehicles such as banners, product display racks, spruikers, permanent (lighted) signs

Timing may include:

- continuous advertising throughout the year
- seasonal advertising eg cough medicine, suntan lotion
- pre-launch advertising
- pre-sale advertising

Distribution of advertising may include:

- evenly spread over the time schedule
- in waves, with heavy advertising followed by light or no advertising

Effectiveness measures may include:

- awareness measurements
- recall measurements
- readership measurements
- physiological measurements
- media audience measurements
- opinion measurements
- attitude measurements
- inquiry measurements
- split-run tests
- theatre tests
- split cable tests
- sales measurements
- market tests

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence

- Integrated demonstration of all elements of competency and their performance criteria
- Evidence of the rationale behind decisions to be included

Underpinning Knowledge*

*   At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Organisation's products and services
- Organisation's budget
- Types of media
- Advertising and creative briefs
- Media characteristics
- Terms for describing media audiences
- Data analysis and matching techniques
- Legal and ethical requirements of advertising

Underpinning Skills

- Literacy skills to interpret the characteristics of different media and match them to the requirements of the advertising brief
- Evaluation skills for comparing and weighing advantages of one medium over another, and matching characteristics with media requirements
- Communication skills for consulting over the media schedule
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

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Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 3	Level 2	Level 2	Level 2	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

• **Collecting, analysing and organising information** – to define media requirements and organise the schedule and media plan

• **Communicating ideas and information** – through the presentation of the media plan with its supporting information

• **Planning and organising activities** – to prepare the media schedule

• **Working with teams and others** – to finalise an acceptable schedule and media plan

• **Using mathematical ideas and techniques** – for scheduling, budgeting, and comparing costs of different combinations of the number, size or length and placement of advertisements

• **Solving problems** – to balance the requirements of each component of the advertising brief and select suitable media

• **Using technology** – for analysis if necessary and compilation of the media plan

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBADV508A   Present an advertising campaign

Unit Descriptor   This unit covers presentation of full information to the advertiser about the proposed advertising campaign in order to allow adjustments prior to campaign implementation.

This unit is related to BSBADV602A. Develop an advertising campaign.

Competency Field   Business Development

Element	Performance Criteria
1. Plan an advertising campaign presentation	1.1 Presentation approach is planned and documented
	1.2 *Presentation format and delivery method/s* are chosen to suit the campaign media and message, the client, the location, the resources and the personnel needed
	1.3 The presentation format allows full information to be provided and meets the requirements of the advertisement/s to be presented
	1.4 The presentation timetable provides opportunities for the client to question and clarify reasons for content and timing decisions and to provide feedback and suggestions
2. Prepare for an advertising campaign presentation	2.1 Presentation materials are prepared that suit the format, the purpose of the presentation and the client
	2.2 Personnel are identified and briefed on the purpose of the presentation and their role/responsibilities in it
	2.3 Equipment and resources are arranged in accordance with the requirements of the creative elements of the presentation
	2.4 Presentation is scheduled to meet the requirements of the client, any other personnel needed and the location
3. Deliver an advertising campaign presentation	3.1 The campaign proposition is introduced to the client and reasons for decisions on the focus, media, appeal and timing of advertisements are provided
	3.2 The *central idea* is presented to the client along with the *creative technique/s* chosen to express it
	3.3 The presentation includes reasons for creative choices and shows how the central idea and its presentation will achieve the client's advertising objectives for the product or service
	3.4 Persuasive communication techniques are used to secure the client's interest
	3.5 Non verbal and verbal communication of the client is monitored and the presentation is adjusted in response to requests for additional information or explanation

Element	Performance Criteria
	3.6 The presentation provides time for the client to consider the campaign proposition and provide feedback
4. Act on feedback from advertising campaign presentation	4.1 Client response to the advertising presentation is analysed and adjustments suggested
	4.2 Changes are negotiated to the campaign in response to the client's feedback, that continue to meet advertising objectives and budget requirements
	4.3 Campaign is adjusted to meet client needs
	4.4 Adjusted campaign meets *legal and ethical requirements*

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Presentation format and delivery method/s may include:	• verbal presentation • individual presentation • team presentation • visuals • advertising copy • storyboards • scripts • video • audio

Range Statement

Central ideas may include:	• testimonials
	• celebrities
	• continuing characters
	• product uses
	• recipes
	• analogy and association
	• exaggerated situations
	• fantasy
	• photographic tricks or special effects
	• case histories
	• slice-of-life situations
	• demonstrations
Techniques for expressing the central idea may include:	• use of humour
	• use of a presenter
	• animation
	• live action
	• comparative advertising
	• use of colour and/or black and white
	• music
	• sound effects
	• signature elements eg slogans, logotypes, package
Legal and ethical requirements may include:	• legislation
	• regulations
	• codes of practice
	• ethical principles
	• policies and guidelines
	• society's expectations
	• cultural expectations and influences
	• social responsibilities eg protection of children, environmental issues

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• A real or simulated presentation to demonstrate the integration of the performance criteria with particular emphasis on interaction and assimilation of client feedback
Underpinning Knowledge* * At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Organisation's budget
	• Purposes of advertising
	• Different advertising approaches for different markets
	• Types of advertising objectives and the strategies to address them
	• Advertising briefs
	• Central idea and creative techniques to express it
	• Legal and ethical requirements
Underpinning Skills	• Literacy skills to prepare presentation information, and write in a range of styles for different audiences
	• Communication including questioning, clarifying and re-phrasing
	• Presentation skills
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 3	Level 2	Level 2	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to prepare presentation for advertising campaign
- **Communicating ideas and information** – by verbal and visual means during the presentation
- **Planning and organising activities** – to schedule the presentation and ensure materials and equipment are available
- **Working with teams and others** – to coordinate the input of all personnel at the presentation
- **Using mathematical ideas and techniques** – in the presentation of budgetary and scheduling information
- **Solving problems** – through negotiation if the client's response to the advertising presentation is negative
- **Using technology** – to demonstrate audio and visual materials

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBADV601A   Create an advertising brief

Unit Descriptor   This unit covers creation of an advertising brief in consultation with the client to reflect advertiser needs and preferences.

Competency Field   Business Development

Element	Performance Criteria
1. Determine advertiser requirements	1.1 *Advertising purpose* and objectives are confirmed with the advertiser
	1.2 Comprehensive *client and product information* is obtained
	1.3 The outcomes of previous advertising are reviewed with the client
	1.4 Budget allocation is confirmed with the client
2. Develop an advertising brief	2.1 The brief contains a client profile, together with a purpose statement and objectives that reflect advertiser needs
	2.2 *Advertising objectives* are stated in measurable terms and provide specific guidelines on what is to be accomplished by the advertising
	2.3 Key characteristics, competitive factors and the market situation facing the product or service are defined in the brief
	2.4 The brief includes summary *information on the target audience*
	2.5 *Legal and ethical constraints* on advertising the product or service are incorporated in the brief
	2.6 The brief contains a budget allocation and schedule of activities which comply with the advertiser's requirements
3. Develop the creative brief	3.1 The creative brief identifies *advertising content* and is written in consumer language
	3.2 The creative brief identifies a *pitch* or *appeal* for the product that meets the advertiser's requirements
	3.3 The creative brief identifies *supporting information* that is required for consumer understanding of the product or service
	3.4 The creative brief contains a budget for creative work that is consistent with the overall advertising budget
	3.5 A deadline for creative work that is consistent with the overall advertising schedule is incorporated in the brief

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Advertising purpose may include:	• communicating a message to a particular audience • stimulating demand for a product or service • promoting image • differentiating features or benefits • providing information • retention of customers • recruitment of staff
Client and product information may include:	• the company, its business policies and practices • the company's promotional ethos • product name and characteristics • price, if any • packaging design • problems and opportunities facing the product • past advertising for the product • existing customers and target market • distribution channels • the competition
Advertising objectives may include:	• to maintain or increase awareness of a product or service • the launch or re-launch of a product or service • to test a product or service • to improve sales performance and /or profit • to maintain or improve market share

Range Statement

Information on the target audience may include:	• demographics • lifestyle • social and cultural factors • values or attitude factors • existing product usage
Legal and ethical constraints may include:	• legislation • regulations • codes of practice • ethical principles • policies and guidelines • society's expectations • cultural expectations and influences • social responsibilities eg protection of children, environmental issues
Advertising content:	• is the information to be communicated to the audience • advertising content may include: • features of the product / service • (brand) image factors • competitive advantages • where the product may be obtained, price, colour etc
Pitch or appeal:	• is the key benefit promised to the audience by the advertiser, and • should be a useful and believable promise to consumers • the pitch or appeal may be: • positive or negative • rational • emotional • need-arousing or need-satisfying
Supporting information may include:	• evidence to support the claimed benefit • a requirement to specify the target audience • purchasing information • reassurances for existing users

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria • Evidence that advertising content and focus in the completed brief meet the advertiser's requirements • Reasons for choice of advertising pitch or appeal and supporting information to be provided
Underpinning Knowledge* * At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • Organisations products or services • Organisation's budget • Consumer behaviour • Purposes of advertising and advertising briefs • Influences on buyer behaviour • Budgets • Schedules • Legal and ethical requirements
Underpinning Skills	• Literacy skills to identify company and product information, to write in a range of styles for different audiences and to interpret legal requirements, company policies and procedures • Communication including questioning, clarifying and reporting • Numeracy skills for budgeting • Project planning skills for identifying timelines and allocating tasks • Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement

- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package

- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment

- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

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Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 3	Level 3	Level 2	Level 3	Level 1	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – Collecting information from the advertiser, analysing it to identify the key characteristics to be exploited through advertising, and organising it into a comprehensive brief for others to use

- **Communicating ideas and information** – to prepare an advertising brief that communicates ideas and information to the advertiser and the creative team who will develop the advertisement

- **Planning and organising activities** – to prepare a schedule of activities as part of the advertising brief

- **Working with teams and others** – to confirm requirements with the advertiser and work consultatively to develop the brief to meet those needs

- **Using mathematical ideas and techniques** – to develop a budget for the overall advertising and creative brief

- **Solving problems** – Identifying problems (and opportunities) for the product / service and suggesting a solution through advertising

- **Using technology** – if necessary, to record and present the advertising brief

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

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BSBADV602A   Develop an advertising campaign

Unit Descriptor   This unit covers determination of key objectives and development of an advertising campaign to optimise product or service market performance in response to an advertising brief.

This unit is related to BSBADV508A Present an advertising campaign. Consider co-assessment with BSBADV604A Execute an advertising campaign and BSBADV605A Evaluate campaign effectiveness.

Competency Field   Business Development

Element   Performance Criteria

1. Define campaign objectives

    1.1 The advertiser's purpose and objectives from the advertising brief are clarified and used to set objectives for the advertising campaign

    1.2 Campaign objectives are stated in measurable terms and identify the nature and extent of what is to be accomplished by the advertising

    1.3 Campaign objectives are feasible, given the constraints of time, budget, product and market factors

    1.4 Campaign objectives take into consideration *factors which may affect consumer responses*

    1.5 Campaign objectives meet *legal and ethical requirements*

2. Prepare an advertising budget

    2.1 *Research* resource requirements for the advertising campaign are assessed and specified

    2.2 Resource requirements for a range of *media options* are assessed and specified

    2.3 Resource requirements for *creative and production services* for the campaign are assessed and specified

    2.4 Resources allocated to each component of the advertising campaign are justified and sufficient, in relative terms, to achieve the campaign objectives

    2.5 The overall budget meets the requirements of the advertising brief

Element	**Performance Criteria**
3. Develop a schedule for proposed advertising activities	3.1 Campaign length and timing is confirmed from the advertising brief
	3.2 Service providers with the required expertise are identified and their costs and availability negotiated
	3.3 Choice of service providers is based on merit and value for money and meets legal and ethical requirements
	3.3 The time allowed in the schedule to meet creative, media and production requirements is sufficient to achieve the advertising objectives
	3.4 The schedule includes milestones for monitoring progress and expenditure against budget, and evaluating campaign effectiveness

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
Campaign objectives may include:	• increasing awareness of a product, service or brand
	• increasing knowledge about a product or service
	• changing attitudes
	• increasing response to a product or service from a particular demographic group
	• generating or increase sales
	• improving or maintain market share

Range Statement

Factors which may affect consumer responses may include:	• gender
	• age
	• disability
	• values
	• culture
	• marital status
	• lifestyle
	• affluency
Legal and ethical requirements may include:	• legislation
	• regulations
	• codes of practice
	• ethical principles
	• policies and guidelines
	• society's expectations
	• cultural expectations and influences
	• social responsibilities eg protection of children, environmental issues
Research may include:	• observation
	• sampling
	• quota sampling
	• interviews (face to face and telephone)
	• indirect research such as depth or focus group interviews, projective questioning, association tests
	• surveys
	• questionnaires
	• panel research
	• group interviews
	• retail audits (to determine brand share)
	• attitude surveys
	• specialised research eg 'mystery shoppers'
	• experiments or market testing on a segment of the market
	• desktop research
Occupational health and safety considerations may include:	• safety of researcher and public during research activities
	• remote / isolated work policies and procedures (for health and safety of workplace personnel)

Range Statement

Media options may include:	• television
	• radio
	• cinema
	• the press
	• billboards
	• video
	• video games
	• videotext
	• cable and satellite television
	• sponsorship
	• direct mail
	• direct response
	• point-of-sale
	• sales literature
	• sales promotion
	• exhibitions and trade fairs
	• aerial advertising
Creative and production services may include:	• copywriter
	• artist / illustrator
	• graphic designer
	• printer
	• photographer
	• producer
	• director
	• film maker
	• presenter
	• performers
	• voice over
	• camera person
	• sound technician
	• special effects practitioner
	• stunt people
	• musicians
	• lighting technician

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria • Supporting reasons for decisions regarding the central idea, budget and time allocations to be included
Underpinning Knowledge* * At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • Organisation's products or services • Organisation's budget • Purposes of advertising • Different advertising approaches for different markets • Types of advertising objectives and the strategies to address them • Advertising briefs • Consumer behaviour • Influences on buyer behaviour • Legal and ethical requirements
Underpinning Skills	• Literacy skills to identify company and product information, write in a range of styles for different audiences and interpret legal requirements, company policies and procedures • Communication including questioning, clarifying and reporting • Numeracy skills for budgeting and scheduling • Project planning skills for identifying timelines and allocating tasks • Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

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Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 3	Level 3	Level 3	Level 2	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to define campaign objectives
- **Communicating ideas and information** – through the development of a central advertising idea
- **Planning and organising activities** – to prepare a schedule of activities
- **Working with teams and others** – to negotiate their services
- **Using mathematical ideas and techniques** – to prepare budgets and schedules
- **Solving problems** – to balance the resource requirements of a number of competing elements
- **Using technology** – for recording and scheduling activities, if required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

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BSBADV603A Manage advertising production

Unit Descriptor   This unit covers planning, directing, monitoring and evaluating the production of electronic and print advertising.

This unit is related to BSBADV403A Monitor advertising production.

Competency Field   Business Development

Element

Performance Criteria

1. Plan the production process for advertisements

1.1 Timing and budgetary requirements for creative and production work are confirmed

1.2 The creative brief is assessed and *factors that influence the production process* are identified

1.3 *Production processes* are investigated and determined to suit both the creative work and the advertising medium

1.4 *Specifications* are determined to suit both the advertisement and the production process

1.5 *Pre-production work* is scheduled to meet production requirements

1.6 A *production schedule* is planned to meet the requirements of the advertising brief and the media plan

2. Evaluate and select suppliers

2.1 *Suppliers* are identified for each element in the production process

2.2 Suppliers are assessed in terms of their expertise and capacity to meet production, budget and schedule requirements

2.3 Choice of suppliers is based on merit and value for money and meets legal and ethical requirements

2.4 Suppliers are briefed and their agreement to meet production, schedule and price requirements gained

3. Direct the advertising production process

3.1 Management of all *aspects* of the production process is integrated to meet the requirements of the advertising brief and schedule

3.2 *Creative specialists* are involved in the production process to solve creative problems and advise on creative changes to ensure the resulting advertisement is consistent with the objectives and positioning for the product or service

3.3 The outputs from the production process meet the requirements of the production schedule, creative brief and media plan

Element	Performance Criteria
4. Evaluate advertising production	4.1 The quality and cost-effectiveness of the production processes are evaluated and reported against the requirements of the creative brief
	4.2 Evaluation processes are valid and measure quality against the standards established in the creative brief
	4.3 The final advertisement is evaluated in relation to the requirements of the creative brief

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Factors that influence the production process may include:	• creative concept • central idea • image factors • budget • timeframe
Print production processes may include:	• letterpress • offset lithography • rotogravure • flexography • silk screen • desktop publishing • inkjet printing • computer software programs • pre-print production processes

Range Statement

Electronic production processes may include:	• film • video • sound recording • live recording • websites
Printing specifications may include:	• art reproduction: • photography • line art • halftones • screens • colour reproduction: • spot colour • process colour • colour separation • computerised colour reproduction • colour register/s • typesetting • composition
Pre-production work may include:	• receipt and review of advertising copy • receipt of visual elements and layout • scripts • storyboards • set construction • rehearsals
Production schedule may include:	• pre-production, production and post-production work • film or video shooting • sound recording
Post-production work may include:	• assembling scenes • sound mixing • editing • dialogue synchronisation

Range Statement

Occupational health and safety considerations may include:	• safety of work sites and sets for workers and public
	• safety of activities in scripts, storyboards
	• safe operation of equipment
	• provision of amenities during filming, recording, photography
	• managing contracted employees ie hiring advertising agencies
Suppliers may include:	• agency
	• contract
	• in-house
	• paper suppliers
	• colour scanning
	• electronic data exchange
	• producer
	• director
	• art director
	• copywriter
	• editor
	• film, video or recording crew
	• presenter/s
	• actor/s
	• lighting technicians
	• sound technicians
Aspects of the production process may include:	• human
	• technical
	• physical
Creative specialists may include:	• copywriter
	• art director
	• graphic designer
	• artist / illustrator

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Reasons for choice of supplier to be provided
	• Evaluation of the process and outputs to demonstrate how the objectives have been met
Underpinning Knowledge* * At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Organisation's budget
	• Organisation's product and/or services
	• Advertising briefs
	• Creative briefs
	• Media plans
	• Printing production process
	• Television, film and video production processes
	• Legal and ethical requirements
Underpinning Skills	• Literacy skills to interpret production requirements and supplier profiles, and prepare a production plan
	• Communication including questioning, clarifying and reporting
	• Numeracy skills for budgeting and scheduling
	• Project management skills for directing and monitoring suppliers
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 3	Level 2	Level 3	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to determine requirements and determine specifications
- **Communicating ideas and information** – to negotiate with suppliers
- **Planning and organising activities** – to plan the production process for advertising
- **Working with teams and others** – to manage all parts of the production process
- **Using mathematical ideas and techniques** – to monitor budgets and prepare schedules
- **Solving problems** – to ensure creative quality and deal with required changes
- **Using technology** – to monitor progress against the schedule and expenditure against budget

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBADV604A   Execute an advertising campaign

Unit Descriptor   This unit covers coordination and monitoring of the implementation of an advertising campaign.

Consider co-assessment with BSBADV605A Evaluate campaign effectiveness.

Competency Field   Business Development

Element

Performance Criteria

1. Develop an implementation strategy

   1.1 The creative brief and media plan are analysed and factors affecting implementation of the campaign determined

   1.2 The strategy outlines implementation tasks and timelines and includes a contingency plan for dealing with omissions and errors

2. Negotiate media contracts

   2.1 The media plan and budget for implementation is confirmed with the client

   2.2 Advertisement *positions* and *price* are negotiated with each media vehicle in accordance with the client's requirements

   2.3 *Contingency factors* and solutions are negotiated and agreed with the media

   2.4 Media contracts are established that meet legal and ethical requirements and the requirements of the advertising campaign brief and schedule

3. Monitor the advertising campaign

   3.1 Media performance is evaluated against the conditions of the contract and variations identified and analysed

   3.2 The provisions of media *guarantees* are applied if necessary, and adjustments made to media schedules

   3.3 The execution of the advertising campaign complies with the advertising schedule and budget

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental

Range Statement

	issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice

Advertising position may include:	• left or right page
	• above or below the fold
	• EGN
	• page number
	• fixed position each week in a radio/television or other program
	• evenly spread during the time schedule
	• scatter plan which places an advertisement in different programs or positions each week

Price may include:	• negotiation of
	• discounts
	• buying incentives
	• concessions
	• guarantees

Contingency factors may include:	• technical errors
	• programming errors

Guarantees may include:	• price
	• position
	• frequency

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Information on likely problems with media placement and strategies to deal with them

Underpinning Knowledge*	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
* At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.	
	• Organisation's budget

Evidence Guide

- Legal and ethical requirements
- Advertising and media briefs
- Media options
- Campaign contingencies
- Media pricing policies
- Media guarantees
- Media vehicles

Underpinning Skills

- Literacy skills to interpret media requirements and establish contracts
- Communication including questioning, clarifying and reporting
- Numeracy skills for budgeting and scheduling
- Project management skills for monitoring contracts
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Context/s of Assessment

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 3	Level 2	Level 3	Level 2	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to analyse requirements
- **Communicating ideas and information** – to negotiate media contracts
- **Planning and organising activities** – to develop an implementation strategy
- **Working with teams and others** – to negotiate media contracts
- **Using mathematical ideas and techniques** – to negotiate prices and monitor budgets
- **Solving problems** – to deal with contingencies
- **Using technology** – to execute the media campaign

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBADV605A   Evaluate campaign effectiveness

Unit Descriptor   This unit covers development and implementation of a campaign evaluation strategy in order to determine whether advertising objectives have been attained.

Consider co-assessment with BSBADV602A Develop an advertising campaign and BSBADV604A Execute an advertising campaign.

Competency Field   Business Development

Element	Performance Criteria
1. Develop a campaign evaluation strategy	1.1 The evaluation strategy defines standards and measurements by which the *effectiveness* of the advertising can be measured and improvements identified
	1.2 The strategy establishes specific performance standards for each *element of the advertising campaign* as well as the overall outcome
	1.3 The strategy includes *standards* for the evaluation of the *legal and ethical* acceptability of the advertisement/s
	1.4 The strategy includes processes for correcting advertisements which do not meet legal and ethical standards
2. Implement campaign evaluation strategy	2.1 Expenditure data is evaluated to determine effectiveness in relation to budget
	2.2 The media program is evaluated to determine performance against the objectives of the media plan
	2.3 The creative strategy is evaluated in terms of copy content, creative execution and effectiveness of the finished advertisement
	2.4 The interactive effect of all the elements in the advertising campaign is evaluated to determine the overall effectiveness of the advertising campaign
3. Utilise advertising effectiveness data	3.1 The results of evaluations of advertising effectiveness are used in the analysis and planning phase for subsequent advertising
	3.2 Expenditure information is used to improve the budget planning process
	3.3 Feedback on the advertisement itself is used to provide ideas for future advertisements and to improve advertising copy
	3.4 Media performance information is used to determine whether alternative media approaches would yield better results

Element	Performance Criteria
	3.5 Differences between planned and actual accomplishments are used to define problems to be addressed in the next planning phase

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Elements of the advertising campaign may include:

- research
- creative materials
- finished advertisement
- purchase of advertising media
- campaign launch
- expenditure against budget

Effectiveness measures may include:

- cognitive tests
- physiological tests
- readership tests
- recall tests
- related recall
- awareness studies
- ratings
- tracking study
- affective tests
- consumer juries
- headline testing
- conative tests
- inquiry measurement
- split-run tests
- theatre tests
- split cable testing

Range Statement

- split scan system
- sales analysis
- consumer take-away
- retail audit
- controlled store testing
- simulated test market (STM)

Legal and ethical standards may include:	- legislation
	- government regulations
	- policies
	- non-government agency regulations
	- industry self-regulation standards
	- codes of practice
	- privacy standards
	- safety standards
	- standards relating to truth in advertising
	- 'good taste' standards
	- standards relating to the use of sex in advertising
	- standards relating to women, children, and culturally and linguistically diverse groups
	- standards relating to subliminal advertising
	- standards relating to comparative advertising

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	- Integrated demonstration of all elements of competency and their performance criteria
	- Campaign effectiveness to be evaluated during and after a campaign
Underpinning Knowledge* * At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.	- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	- Organisation's budget planning process
	- Techniques for evaluating advertising effectiveness
	- Advertising objectives
	- Legal and ethical requirements

Evidence Guide

- Advertising, creative and media briefs
- Media options
- Corrective action

Underpinning Skills
- Literacy skills to interpret evaluation requirements, legal and ethical requirements
- Communication including questioning, clarifying and reporting
- Numeracy skills for analysing numerical and other data and drawing conclusions
- Evaluation skills
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications
The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance
In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 3	Level 2	Level 2	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to determine the effectiveness of advertising campaigns

- **Communicating ideas and information** – to report on ways to utilise evaluation findings

- **Planning and organising activities** – to implement evaluation processes

- **Working with teams and others** – to gather effectiveness information

- **Using mathematical ideas and techniques** – to analyse evaluation data

- **Solving problems** – to improve advertising planning

- **Using technology** – to compare data, if necessary and interpret results

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSB01 Business Services Training Package

Sales
Competency Standards

CONTENTS

BSBSLS301A   Develop product knowledge

Unit Descriptor   This unit covers the development of product knowledge as preparation for the sales process.

Consider co-assessment with BSBSLS301A Develop product knowledge, BSBSLS303A Present a sales solution, BSBSLS304A Secure prospect commitment and BSBSLS306A Self-manage sales performance.

Competency Field   Business Development

Element	Performance Criteria
1. Acquire knowledge of *products* in a *specified area*	1.1 *Information sources* about *products* in a specified area are identified and evaluated for reliability and validity
	1.2 Product purpose/s and use/s are identified
	1.3 Key *features* of the product are identified
	1.4 Product strengths and limitations are identified
	1.5 Guarantees and warranties are articulated and service support details identified
2. Convert product knowledge into benefits	2.1 Features of the product which have potential buyer appeal are identified
	2.2 Features of the product which have buyer appeal are presented as *benefits*
	2.3 Product benefits are presented within the context of *organisational requirements* and legislation
3. Evaluate competitors' products	3.1 A range of *information sources* is used to identify competitors' products
	3.2 Features of competitors' products to the buyer are identified
	3.3 Potential benefits of competitors' products are identified
	3.4 The *strengths and weaknesses* of competitors' products are established
	3.5 The relative standing of the organisation's product with the competitor product(s) is established

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice • ethics guidelines
The term 'product' encompasses:	• goods, services and/or ideas
Specified area refers to:	• a range of products within a particular industry which has been nominated by the employer and employee

A feature may refer to:	• a fact about the product which may include:
	   • brand
	   • country of origin
	   • colour
	   • style
	   • size
	   • manufacturer
	   • safety aspect
	   • covenant
	   • shelf life
	   • warnings
	   • product care details

A benefit refers to:	• the value that potential buyers place on the product features. The value is not concerned with the price of the product but is anything the prospect defines as of value
Strengths and weaknesses refers to:	• the capability elements of the a product to deliver benefits to potential buyers.

Range Statement

Information sources may include:	• other company personnel
	• catalogues
	• associations
	• trade association magazines
	• trade shows
	• sales conventions
	• claims of competitive sales people
	• competitors' sales literature
	• competitor websites
	• internal sales data records
	• external sales data sources e.g. warehouse withdrawals
Organisational requirements refers to:	• policy and procedures which are formally documented and are available for reference within the workplace
	• the level of client service required
Occupational health and safety considerations may include:	• following policies and procedures relating to remote / isolated work, workplace layout and operation of plant, equipment and hazardous substances

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Demonstration of product knowledge pertaining to both the organisation's and competitors' products in a specified area.
Underpinning Knowledge* * At this level the learner must demonstrate some relevant theoretical knowledge.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Organisation's products
	• Buying and selling processes
	• The organisation's structure
	• Organisational requirements, including policy and procedures

Evidence Guide

- Key competitors and their products
- Industry trends and developments
- Potential buyer markets

Underpinning Skills
- Literacy skills to interpret legal requirements, product labelling and description and organisational requirements
- Sales data interpretation skills
- Ability to obtain information from a variety of verbal and non-verbal sources
- Information management skills, including the ability to summarise information verbally and non-verbally
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications
The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance
In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 1	Level 1	Level 1	Level 2	Level 1	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** to prepare a pocket chart which shows product features and potential benefits

- **Communicating ideas and information** through verbally summarising major product features and benefits

- **Planning and organising activities** through conducting an information gathering exercise using multiple sources

- **Working with teams and others** by discussing with others in the organisation industry trends and developments

- **Using mathematical ideas and techniques** by examining and interpreting sales data

- **Solving problems** by deciding how best to respond to recognised product limitations when questioned by a buyer

- **Using technology** through obtaining product information via an internet search

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBSLS302A   Identify sales prospects

Unit Descriptor   This unit covers identification of potential sales prospects through application of prospecting methods.

Competency Field   Business Development

Element	**Performance Criteria**
1. Employ *prospecting* methods	1.1 A range of *prospecting methods* are identified
	1.2 Both primary and secondary prospecting methods are examined
	1.3 The strengths and limitations of prospecting methods are considered and evaluated
	1.4 Prospecting methods selected match the market toward which the product is targeted
	1.5 Present, previous and new *clients* are targeted through chosen prospecting methods
2. Qualify prospects	2.1 Criteria for qualifying leads are researched and established
	2.2 Criteria established include buyer accessibility, *buyer motives*, and *product* affordability, purchase authority, legal compliance and return for the seller
	2.3 The established criteria represent a standard against which the buying potential of individuals and groups is gauged
3. Manage prospect information	3.1 A system to record prospect information is developed
	3.2 The system for recording prospect information is implemented
	3.3 The system for recording prospect information is monitored for effectiveness
	3.4 The system for recording prospect information is evaluated
	3.5 The system for recording prospect information is refined based on evaluation

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice • ethics guidelines
The term client refers to:	• Client is used as the generic description for a person or organisation who receives (or has the potential to receive) products, services or ideas supplied by the organisation. The term "client" may be translated according to the user's context as "customer", "consumer", "member", "patient", or other title.
The term 'product' encompasses:	• goods, services and/or ideas
Buyer motives may include:	• housekeeping • gift • replacement item • self-gratification • self reward • browsing • buying for unqualified prospect e.g. dependant
Prospecting refers to:	• a continuous process of gathering the names of potential buyers who are likely to be interested in purchasing the salesperson's product
Occupational health and safety considerations may include:	• following policies and procedures relating to remote / isolated work, occupational violence, stress management (work systems)

Range Statement

Prospecting methods may include:

- referrals
- networking
- personal observation
- intra organisation leads
- spotters
- cold canvassing
- direct mail
- media advertising
- telemarketing
- journals
- magazines
- newspapers
- public records
- internet
- databases
- brokers

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence

- Integrated demonstration of all elements of competency and their performance criteria
- Use and management of prospecting information which converts sales prospects into clients

Underpinning Knowledge*

* At this level the learner must demonstrate some relevant theoretical knowledge.

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Organisation's products and services
- Buying and selling processes
- The organisation's structure
- Organisational requirements, including policy and procedures
- Key competitors and their products
- Industry trends and developments
- Buyer motives
- Range of prospecting methods, and prospect information management strategies

Evidence Guide

| | • Prospecting as a key component of the overall sales process |
| | • Familiarity with range of buyer motives |

Underpinning Skills
- Use of internet and other technology to locate prospect information
- Literacy skills to interpret legal requirements, company policies and procedures
- Ability to design and recording formats to facilitate information storage and retrieval
- Interpretation of numerical data associated with prospects
- Use of technology to store and manage prospect information
- Ability to apply analytical skills in relating products to prospects' requirements
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 1	Level 1	Level 1	Level 1	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** by using a range of information sources to determine key prospects
- **Communicating ideas and information** through listing key prospecting criteria
- **Planning and organising activities** by implementing prospecting methods to support sales
- **Working with teams and others** in developing prospecting methods
- **Using mathematical ideas and techniques** by analysing prospect statistics
- **Solving problems** by determining how best to identify and access key prospects
- **Using technology** to store and retrieve prospect information

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBSLS303A   Present a sales solution

Unit Descriptor   This unit covers presentation of a sales solution which responds to the specific buying needs of the client.

Consider co-assessment with BSBSLS301A Develop product knowledge, BSBSLS304A Secure prospect commitment and BSBSLS306A Self-manage sales performance.

Competency Field   Business Development

Element

Performance Criteria

1.   Prepare for *presentation*

1.1   *Products* are obtained and organised for use within the presentation.

1.2   Product information is reviewed to ensure familiarity with products

1.3   Sales tactic options are identified, assessed and chosen in terms of their ability to meet the needs and preferences of the prospect

1.4   A variety of sales solutions are considered and prepared to meet buyer needs

1.5   *Sales aids* are identified and selected

1.6   Alternatives for prospects are identified and assessed in relation to anticipated buyer needs

2. Present a sales solution

2.1   Gestures, posture, body language, facial expressions and voice are used to create a supportive selling environment

2.2   Listening skills are applied to determine buyer needs

2.3   Buyer needs, preferences, motives and objections are identified through use of open-ended questions

2.4   A presentation is made that is adjusted to match the needs and preferences of the buyer

2.5   Persuasive communication techniques are used to secure buyer interest

2.6   Products are demonstrated or explained to enhance buyer retention

2.7   The presentation communicates the key features of the product and emphasises benefits in relation to identified buyer needs

2.8   *Proof of benefits* to be obtained through product purchase is presented

2.9   Sales support materials are utilised to build buyer understanding of how the product is aligned with needs

Element	Performance Criteria
3. Manage buyer resistance	3.1 Probing is utilised to identify the source of *buyer resistance*
	3.2 The strengths and limitations of buyer resistance strategies are identified
	3.3 A strategy for managing buyer resistance is selected and implemented
	3.4 The strategy selected for managing buyer resistance addresses the source of buyer resistance

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
	• ethics guidelines
The term 'product' encompasses:	• goods, services and/or ideas
The term 'sales solution' refers to:	• the demonstration of how particular product(s) match a buyer's specific needs
Presentation could be conducted:	• in person
	• via telephone
	• through email or web site
	• through facsimile
Proof of benefits may be provided through:	• statistics
	• comparisons
	• testimony
	• anecdotes and examples

Range Statement

Sales aids may include:	• the product itself or product samples
	• models
	• photographs
	• printed materials
	• photographs and drawings
	• graphs
	• transparencies
	• whiteboards
	• electronic media
Sources of buyer resistance may include:	• no perceived need
	• uncertainty about the product
	• price resistance
	• service dissatisfaction
	• timing issues
	• company resistance
	• salesperson resistance
Strategies for managing buyer resistance may include:	• direct denial
	• boomerang
	• indirect denial
	• superior benefit
	• trial offer
	• offer of incentives
	• probing with open and closed questions
	• checking perceptions
	• using assertive messages
	• requesting additional information from buyers
Occupational health and safety considerations may include:	• following policies and procedures relating to remote / isolated work, occupational violence, report hazards, organisation of work to prevent adverse effects on health

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence

- Integrated demonstration of all elements of competency and their performance criteria
- Presentation of a sales solution which responds to specific buying needs and which highlights major features of the products

Underpinning Knowledge*

*	At this level the learner must demonstrate some relevant theoretical knowledge.

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Effective sales presentation mix
- Range of sales support materials which can be utilised to support presentations
- Detailed product knowledge including features, advantages and benefits
- Understanding of use of technology to support sales presentation

Underpinning Skills

- Client service skills, especially the ability to determine client needs and preferences
- Demonstration, questioning and explanation skills, including the ability to present acquired product related information to a diverse client base
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- Negotiation and conflict resolution skills
- Use of statistics to support a verbal argument
- Use of persuasive and assertive language in promoting product features and benefits
- Active listening skills as applied to resolution of client resistance to purchasing a product
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Evidence Guide

Consistency of Performance   In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Context/s of Assessment

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement

- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package

- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment

- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 3	Level 2	Level 1	Level 1	Level 1	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** in gathering product information in preparation for a presentation
- **Communicating ideas and information** in demonstrating a product to a prospect
- **Planning and organising activities** in preparing to deliver a sales presentation
- **Working with teams and others** in developing sales team approaches to presenting products
- **Using mathematical ideas and techniques** in presenting statistical information to enhance buyer appeal
- **Solving problems** when deciding how best to manage buyer resistance to a particular product or feature of that product
- **Using technology** in delivering a sales presentation via the telephone

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBSLS304A   Secure prospect commitment

Unit Descriptor   This unit covers the sales processes associated with securing prospect commitment to proceed with a sale.

Consider co-assessment with BSBSLS301A Develop product knowledge, BSBSLS303A Present a sales solution and BSBSLS306A Self-manage sales performance.

Competency Field   Business Development

Element	Performance Criteria
1. Respond to buying signals	1.2 Verbal buying signals are identified
	1.3 Non-verbal buying signals are identified
	1.4 Verbal and non-verbal buying signals are assessed
	1.5 A decision is made as to whether to respond to a buying signal by closing the sale
	1.6 *Trial closes* are utilised to assist the buyer to make decisions on a minor points related to the product
	1.7 Trial closes are used strategically during different stages of the sales process
2. Negotiate the sale	2.1 A *formal close* to the sales process is initiated following one or more trial closes
	2.2 *Conditions* of the agreement are negotiated
	2.3 A range of different strategies are assessed to close the sale
	2.4 A strategy is selected to close the sale
	2.5 Supportive and confirming language is utilised to support the closure of the sales process
	2.6 Options for simple sales transactions are described and demonstrated to match specified situations
	2.7 The prospect's decision to purchase is responded to in an assertive manner
3. Finalise the agreement	3.1 A summary of the agreement is outlined to the buyer
	3.2 The decision of the buyer is confirmed
	3.3 Process and completion of the sales transaction comply with organisational requirements
	3.4 Sales document is prepared and completed
	3.5 Advice on financing arrangements is accurate, matches the client's financial situation, and complies with organisational requirements
	3.6 Cross selling opportunities are identified and presented to the buyer
	3.7 A desire to continue the sales relationship is expressed

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice • ethics guidelines
The term 'product' encompasses:	• goods, services and/or ideas
Buying signals:	• are verbal and non-verbal indications that the prospect is interested in the product and is preparing to make a decision about the purchase of the product. Buyer signals can be personal (which relate to one's own preferences) or organisational (where a buyer is purchasing on behalf of an organisation)
Buying signals may include:	• questions • confirmations, • statement of requirement by prospect • smiling and nodding • moving closer to where a product is to be installed • close examination of the product by the prospect
Trial closes refers to:	• a prospect's commitment on a minor point related to sale of the product that might lead to closing the sale. Trial closes may be initiated after anytime a prospect shows strong interest in the product or after a buying signal is recognised.
Trial closes may include:	• a question or paraphrase that focuses the interaction.
A formal close refers to:	• a request by the salesperson to the prospect to agree to purchase the product
A formal close may include:	• summary of the benefits, inducement, narrative close, offering alternative choices

Range Statement

Conditions may include:	• price, delivery, payment options, client loyalty, length of contract.

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence

- Integrated demonstration of all elements of competency and their performance criteria
- Buyer signals are recognised and responded to in order to secure prospect commitment to purchasing the product

Underpinning Knowledge*

*   At this level the learner must demonstrate some relevant theoretical knowledge.

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Sales closure techniques, and situations in which it is appropriate to attempt closure
- Detailed product knowledge including features, advantages and benefits

Underpinning Skills

- Client service skills, especially the ability to determine client needs and preferences
- Negotiation and conflict resolution skills
- Use of persuasive and assertive language in promoting product features and benefits
- Ability to interpret and respond to verbal and non-verbal cues
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 1	Level 2	Level 1	Level 1	Level 1	Level 1	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** in reading and interpreting non-verbal and verbal buying signals
- **Communicating ideas and information** in summarising the sales agreement
- **Planning and organising activities** in arranging for the delivery of a product
- **Working with teams and others** in checking and confirming product availability
- **Using mathematical ideas and techniques** in estimating and calculating discounts
- **Solving problems** in determining the optimal stage in the sales process to initiate closure
- **Using technology** in completing sales transactions

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBSLS305A   Support post-sale activities

Unit Descriptor   This unit covers attendance to post-sale activities that build and strengthen the partnership between salesperson and client, and enhance the prospect of future sales.

Consider co-assessment with BSBSLS306A Self-manage sales performance.

Competency Field   Business Development

Element	Performance Criteria
1. Strengthen client relationships	1.1 Contact is made with the buyer post-sale to ensure agreed expectations have been met
	1.2 *Feedback* on the sales process and product satisfaction is solicited
	1.3 Service problems and difficulties identified through feedback are addressed and resolved
	1.4 *Client loyalty strategies* are developed and implemented to secure buyer loyalty
2. Process the order	2.1 Client order details are recorded in accordance with organisational policy and procedures
	2.2 The order for the product is forwarded to the relevant section of the organisation
	2.3 Processing of the order is monitored
3. Deliver support to agreed expectations	3.1 Technical assistance and/or advice is provided in relation to the product purchased
	3.2 Defective returns are handled in accordance with organisational requirements
	3.3 Information to facilitate product repair, support or servicing is provided
	3.4 Liaison services are provided to assist clients to access appropriate after sales support
	3.5 Records of after sales support are kept in accordance with organisational requirements to prompt client follow-up

Element	Performance Criteria
4. Handle client feedback	4.1 Feedback is clarified and confirmed with the clients
	4.2 The client's needs and requirements are determined
	4.3 Possible responses to client feedback are identified and evaluated
	4.4 A decision is made on a response that meets *client* needs and requirements in accordance with organisational policy and procedures
	4.5 Contact is made with the client to ensure that the response is satisfactory

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
	• ethics guidelines
The term 'product' encompasses:	• goods, services and/or ideas
The term 'client' refers to:	• Client is used as the generic description for a person or organisation who receives (or has the potential to receive) products, services or ideas supplied by the organisation. The term "client" may be translated according to the user's context as "customer", "consumer", "member", "patient", or other title.
Feedback may be solicited through:	• surveys
	• focus groups
	• one on one interviews
	• telephone interviews
	• email dialogue

Range Statement

Client loyalty strategies may include:	• client clubs
	• credit or discount facilities
	• client reward schemes
	• a phone call thanking the client for the business
	• a handwritten note thanking the client
	• a formal letter of thanks
	• offering promotional items

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Client driven after sales support is provided to build and support ongoing business relationship
Underpinning Knowledge* * At this level the learner must demonstrate some relevant theoretical knowledge.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Detailed product knowledge which enables ongoing advice and support to clients
	• Range of strategies that can be utilised to manage client accounts and build client goodwill
	• Knowledge of the organisation's policy and procedures relating to orders and client services
Underpinning Skills	• Client service skills, especially the ability to determine client needs and preferences
	• Technology skills to enable urgent and routine communication, record keeping, scheduling and reporting
	• Negotiation and conflict resolution skills
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
	• Liaison skills, including the ability to network with business units within an organisation

Evidence Guide

Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 2	Level 1	Level 1	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** in soliciting feedback from clients
- **Communicating ideas and information** in implementing goodwill strategies such as preparing a letter of thanks
- **Planning and organising activities** in arranging for the post-sale servicing of a product
- **Working with teams and others** in arranging product repair
- **Using mathematical ideas and techniques** in estimating service fees
- **Solving problems** when troubleshooting to determine product faults
- **Using technology** in electronically processing a client order

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBSLS306A   Self-manage sales performance

Unit Descriptor   This unit covers self-management of sales performance through establishment of an individualised sales plan, and though management of stress, time, and sales-related paperwork.

Consider co-assessment with BSBSLS301A Develop product knowledge, BSBSLS303A Present a sales solution, BSBSLS304A Secure prospect commitment and BSBSLS305A Support post-sale activities.

Competency Field   Business Development

Element	Performance Criteria
1. Establish an individualised sales plan	1.1 Individual sales goals and quotas are established to focus work activities
	1.2 Consultation / communication structures are established
	1.3 An individualised sales plan is established to achieve sales goals and quotas within a work system that prevents adverse effects on health and safety, and is constructed against clear timeframes
	1.4 The sales plan is monitored in relation to established goals and quotas
	1.5 The sales plan is adjusted in response to monitoring
	1.6 An evaluation of the sales plan is conducted and adjustments are made in response to evaluation
2. Manage stress	2.1 Consultative strategies are established in accordance with organisational policy and procedures
	2.2 Symptoms of *negative stress* are monitored
	2.3 A plan is established in accordance with organisational requirements to reduce *symptoms of negative stress*
	2.4 Routines are established to provide structure for work and to manage workload
	2.5 Time is allocated for unanticipated events and activities
	2.6 Tasks are delegated to individuals to share workload in accordance with organisational requirements

Element	Performance Criteria
3. Manage time	3.1 Priority is given to activities related directly to selling
	3.2 An analysis of the time spent on work related activities is conducted
	3.3 Time spent on specific *work tasks* is adjusted as a consequence of analysis
	3.4 Time management strategies are applied to minimise non-productive sales activities
4. Manage paperwork and reports	4.1 A system is established to collect, record and organise data associated with the sales process
	4.2 Routine reports are completed at regular intervals in accordance with organisational requirements
	4.3 *Available technology* is utilised to facilitate record keeping and production of sales reports

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
	• ethics guidelines
Negative stress may arise in a sales environment due to:	• social, psychological, or physical situations that salespeople believe are beyond their control
Symptoms of negative stress include:	• anxiety
	• nervousness
	• worry or fear; fears of criticism or disapproval; difficulty concentrating; feeling tired
	• weak or easily exhausted; feeling tense or "on edge"; trembling or shaking; restlessness

Range Statement

Work tasks may include:	• face to face selling
	• service calls
	• administrative tasks
	• travelling
	• sales preparation
Available technology may include:	• email
	• databases
	• spreadsheets
	• word processing software packages
	• other computer applications
Occupational health and safety considerations may include:	• workgroup consultative arrangements
	• time and stress management policies and practices
	• communication strategies and support
	• isolated / remote work procedures / policies
	• work and time allocation in accordance with safe systems of work

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Self-management processes are implemented to minimise stress and enhance individual sales performance
Underpinning Knowledge* * At this level the learner must demonstrate some relevant theoretical knowledge.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Organisation's policies and procedures
	• Goal setting processes and its place in development of individualised sales plans
	• Key principles associated with self-management
	• Stress management strategies and techniques

Evidence Guide

Underpinning Skills	• Ability to set goals and quotas to facilitate professional self-improvement
	• Ability to set priorities, to improve time management skills
	• Self-evaluation skills including the ability to solicit and respond to feedback
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 1	Level 1	Level 1	Level 1	Level 1	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** to support the development of sales goals

- **Communicating ideas and information** through preparation of a sales report

- **Planning and organising activities** in planning an individualised sales plan

- **Working with teams and others** in soliciting and receiving feedback from present and past clients

- **Using mathematical ideas and techniques** in determining sales quotas

- **Solving problems** in reviewing and developing improved sales strategies to facilitate attainment of quotas

- **Using technology** to prepare graphical representations of individual sales performance

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBSLS401A   Lead a sales team

Unit Descriptor   This unit covers planning, implementing, directing and evaluating sales team activities.

Competency Field   Business Development

Element	**Performance Criteria**
1. Plan sales operations	1.1 Sales teams objectives are set
	1.2 A sales plan and budget is prepared to support attainment of objectives
	1.3 Objectives developed are related to the nature of the sales operation and are consistent with marketing and sales strategies
	1.4 The size and structure of the sales team is determined
	1.5 Sales team members are recruited, selected and inducted on an ongoing basis in accordance with job analysis and sales team objectives
	1.6 Sales team members are provided with *initial training*
	1.7 Sales team compensation methods and levels are established
	1.8 Sales territories, sales targets and performance standards are established
2. Direct the sales team	2.1 Strategies are implemented to encourage, motivate and support sales team members
	2.2 Sales team members are coached or mentored to facilitate attainment of sales targets
	2.3 Client-focused tactics are modelled for sales team members
	2.4 Resources are allocated on accordance with organisational policy and procedures to support attainment of sales targets
	2.5 Sales volume, conversion rate data and cross-selling ratios are analysed to monitor sales performance
	2.6 The ethical and social conduct of the sales team is monitored in accordance with legal requirements, professional expectations and organisational policy

Element	Performance Criteria
3. Evaluate sales team effectiveness and performance	3.1 Systems are established to evaluate sales effectiveness against performance standards
	3.2 Sales team members are offered constructive feedback on their performance
	3.3 Superior sales team member performance is recognised and rewarded
	3.4 *Corrective action* is taken where sub-standard sales team member performance is identified
	3.5 Sales team planning is adjusted in light of evaluation processes

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
	• ethics guidelines
Client definition:	• Client is used as the generic description for a person or organisation who receives (or has the potential to receive) products, services or ideas supplied by the organisation. The term "client" may be translated according to the user's context as "customer", "consumer", "member", "patient", or other title.
Initial training may be conducted through use of:	• videotapes
	• lectures
	• one-on-one instruction
	• role plays
	• audio-tapes
	• simulations
	• slides
	• films
	• case studies

Range Statement

- videoconferencing
- teleconferencing
- computer packages

Corrective action may include:
- re-training
- additional training
- mentoring
- ongoing feedback goal related feedback
- individualised development plans

Occupational health and safety considerations may include:
- participative arrangements in decision making
- hazard identification, risk assessment and control
- stress management strategies
- remote / isolated work
- occupational violence procedures

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence
- Integrated demonstration of all elements of competency and their performance criteria
- Management and development of a personal sales team to attain sales targets

Underpinning Knowledge*

* At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Recruitment, selection, induction and training in a sales team environment
- Motivation techniques
- Compensation package design principles and practices
- Sales target planning and management
- Territory planning and management
- Budgeting processes
- EEO, equity and diversity principles
- Human resource policy and practices
- Evaluation strategies

Evidence Guide

Underpinning Skills	• Interpreting and explaining complex, formal documents and assisting others to apply them in the workplace
	• Discussion using exchange of complex oral information
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
	• Application of training and development strategies including mentoring and coaching
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 2	Level 2	Level 2	Level 2	Level 2

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** as a basis for preparation of a sales plan for the team
- **Communicating ideas and information** in providing feedback to team members on sales performance
- **Planning and organising activities** through arranging sales team training activities
- **Working with teams and others** in coaching an individual member of the sales team
- **Using mathematical ideas and techniques** in formulating sales team quotas
- **Solving problems** in developing more effective sales strategies to support attainment of sales objectives
- **Using technology** to store and retrieve data in relation to sales team member performance

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSB01 Business Services Training Package

Marketing
Competency Standards

CONTENTS

CONTENTS

BSBMKG301A   Research the market

Unit Descriptor   This unit covers collection and presentation of data on the internal and external business environment.

Consider co-assessment with BSBMKG302A Identify marketing opportunities and BSBMKG303A Draft an elementary marketing audit report.

Competency Field   Business Development

Element	Performance Criteria
1. Collect and present information on the internal business environment	1.1 Core activities, customer base, business values and current business direction are confirmed
	1.2 Information on current *marketing* performance and the effectiveness of past marketing or positioning is identified and summarised
	1.3 *Internal planning documents* are accessed and strengths, weaknesses and critical success factors for the business identified
	1.4 Current *capabilities and resources* are identified and recorded
	1.5 Under-performing products or services are identified and reasons for under-performance documented in accordance with organisational requirements
2. Collect and present information on the external business environment	2.1 Information on expected market growth or decline and associated risk factors is identified and organised in accordance with organisational requirements
	2.2 Projected changes in population, economic activity and the labour force that may affect the business are identified
	2.3 Movements in prices and projected changes in availability of resources are identified and recorded
	2.4 *Trends and developments* are reviewed and their potential impact on the business identified
	2.5 *Comparative market information* is gathered from *primary and secondary sources* and presented in accordance with organisational requirements
	2.6 The *legal, ethical and environmental constraints* of the market and their effect on the business are Identified
3. Investigate new or emerging factors in the market	3.1 *Sources of intelligence* are identified and tapped for advance warning of new products/services/technology or new markets for the business
	3.2 New and emerging issues are recorded and reported in accordance with organisational requirements

Element	**Performance Criteria**
4. Record market data	4.1 Information is checked for accuracy, and to ensure it meets organisational requirements
	4.2 Information is recorded within specified time frames and in accordance with organisational procedures
	4.3 Confidentiality and privacy procedures are followed in accordance with organisational requirements

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
Marketing may include:	• marketing of goods
	• services marketing
	• ideas marketing
	• public sector marketing
	• direct marketing
	• telemarketing
	• business-to-business marketing
Internal planning documents may include:	• strategic business plan
	• marketing plans
	• operational plans
	• information on:
	• share
	• penetration
	• coverage
	• sales
	• profitability
	• production time and cost
	• faults
	• warranties

Range Statement

- accidents
- complaints

Capabilities and resources may include:

- situational factors such as:
  - location/position
  - transport distribution channels
  - 24-hour operation
  - communications
  - level of technology
  - age and life of business equipment
  - industrial relations climate
- competency of staff relative to business needs
- capacity of equipment relative to current output
- human and financial resources
- intangibles such as:
  - service
  - brand
  - image
  - style
  - perceived quality or value
  - social acceptability
  - 'feel good' factor

Trends and developments may include:

- economic trends (local, regional, national, international)
- ecological/environmental trends
- Government activities eg interest rates, deregulation
- social and cultural factors
- demographic trends
- changes in technology
- industrial trends

Comparative market information may include:

- best practice information
- international benchmarking
- inter-firm comparison data

Primary sources may include:

- observation
- interviews (face-to-face and telephone)
- surveys
- samples

Range Statement

- questionnaires
- panel research
- group interviews
- retail audits (to determine brand share)
- attitude surveys
- specialised research
- experiments or market testing on a segment of the market

Secondary sources may include:
- internal company sources, such as sales or distribution figures, financial information, cost analyses
- external sources, such as published government statistics, polls published by advertising and media companies, chambers of commerce data, university databases, data held by research organisations

Legal and ethical constraints may include:
- legislation, eg Trade Practices Act
- regulations
- codes of practice
- ethical principles
- policies and guidelines
- society's expectations
- cultural expectations and influences
- social responsibilities eg protection of children, environmental issues

Sources of intelligence may include:
- current affairs
- peers
- databases
- Internet
- government agencies
- official statistics
- business advisory services
- professional/trade associations
- financial institutions
- national and international publications

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Material is referenced and sources of information are acknowledged
Underpinning Knowledge*	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
* At this level the learner must demonstrate some relevant theoretical knowledge.	• Understanding of organisation's business structure, products and services
	• Data collection tools and methodology
	• Recording and reporting requirements
	• Legal and ethical requirements
Underpinning Skills	• Literacy skills to identify relevant information, to write reports and to record internal and external information
	• Communication including questioning, clarifying, reporting
	• Research skills
	• Analytical skills to identify trends and position of products and services
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement

Evidence Guide

- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package

- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment

- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 2	Level 2	Level 1	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – on the internal and external business environment

- **Communicating ideas and information** – through records and reports

- **Planning and organising activities** – to gather data from a range of sources

- **Working with teams and others** – to collect internal business data

- **Using mathematical ideas and techniques** – for data presentation

- **Solving problems** – to identify new and emerging issues

- **Using technology** – to record data as required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG302A   Identify marketing opportunities

Unit Descriptor
This unit covers identification and presentation of potential marketing opportunities to enable evaluation and selection of viable opportunities.

This unit is related to BSBMKG501A Evaluate marketing opportunities. Consider co-assessment with BSBMKG301A Research the market and BSBMKG303A Draft an elementary marketing audit report.

Competency Field
Business Development

Element	Performance Criteria
1. Confirm business needs	1.1 *Business information* is identified to confirm current *performance* and market position
	1.2 The direction and goals of the business are confirmed
	1.3 Existing structure and operation of the business are confirmed
	1.4 Current *capabilities and resources* are identified and recorded
	1.5 Business needs are identified in accordance with the strategic plan and the marketing plan
2. Identify market needs	2.1 Market trends and developments are investigated to identify market needs relative to the business
	2.2 Comparative market information is sourced to identify possible market needs in relation to the business
	2.3 The *legal and ethical requirements* of the market and their impact on the business are identified
	2.4 *New and emerging markets* are identified and their features documented in accordance with organisational requirements
3. Identify marketing opportunities	3.1 *Marketing* opportunities are identified and described in accordance with organisational requirements
	3.2 Marketing opportunities and supporting information are presented for evaluation in accordance with organisational requirements

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
Business information may include:	• customer requirements
	• sales figures
	• profitability
	• market share
	• competitors' performance
Capabilities and resources may include:	• situational factors such as:
	• location/position
	• transport distribution channels
	• 24 hour operation
	• communications
	• level of technology
	• age and life of business equipment
	• industrial relations climate
	• competency of staff relative to business needs
	• capacity of equipment relative to current output
	• human and financial resources
	• intangibles such as:
	• service
	• brand
	• image
	• style
	• perceived quality or value
	• social acceptability
	• 'feel good' factor

Range Statement

Legal and ethical requirements may include:	• legislation, eg *Trade Practices Act* and Occupational Health and Safety legislation
	• regulations
	• codes of practice
	• ethical principles
	• policies and guidelines
	• society's expectations
	• cultural expectations and influences
	• social responsibilities eg protection of children, environmental issues
New and emerging markets may include:	• segment of the market not currently penetrated
	• export market
	• e-commerce
Marketing may include:	• marketing of goods
	• services marketing
	• ideas marketing
	• public sector marketing
	• direct marketing
	• telemarketing
	• business-to-business marketing

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Rationale for identification of marketing opportunities and their degree of fit with the business and its marketing plan
Underpinning Knowledge* • At this level the learner must demonstrate some relevant theoretical knowledge.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Sources of business and market information
	• Research methodology
	• Legal and ethical requirements

Evidence Guide

- Understanding the organisation's business structure, products and services
- Understanding of the organisation's business and marketing plan

Underpinning Skills	• Literacy skills to identify business and market information, and to write reports
	• Communication including questioning, clarifying, reporting
	• Research skills
	• Analytical skills to identify trends and position of products and services
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
	• Occupational Health and Safety
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 1	Level 1	Level 1	Level 1	Level 1	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to confirm the needs of the business and the market

- **Communicating ideas and information** – to present a range of marketing opportunities

- **Planning and organising activities** – to source information on the business and the market

- **Working with teams and others** – to gather information and present results

- **Using mathematical ideas and techniques** – to gather data

- **Solving problems** – to identify new and emerging markets

- **Using technology** – to record information as required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG303A   Draft an elementary marketing audit report

Unit Descriptor	This unit covers preparation and development of an elementary marketing audit report for use in the preparation of a marketing plan.
	This unit is related to BSBMKG404A Forecast market and business needs. Consider co-assessment with BSBMKG301A Research the market and BSBMKG302A Identify marketing opportunities.
Competency Field	Business Development

Element	Performance Criteria
1. Prepare for a marketing audit	1.1 The main purposes of the *marketing audit* are identified in accordance with organisational requirements
	1.2 The scope of the marketing audit and the audit methodology are determined in accordance with organisational requirements
	1.3 Appropriate times when a marketing audit should be undertaken are determined in accordance with organisational requirements
	1.4 The likely participants in the carrying out of a marketing audit are identified
2. Identify the form of a marketing audit	2.1 The main *characteristics of a marketing audit* are identified in terms of their relevance to the task at hand
	2.2 The main elements to be included in the marketing audit format are identified in accordance with organisational requirements
	2.3 The various forms of a marketing audit are identified and those that best meet the requirements of the marketing plan are selected in accordance with organisational requirements
3. Conduct an external marketing audit	3.1 *Criteria to use in the external marketing audit* are identified in accordance with organisational requirements
	3.2 *External environmental factors* are identified and described in qualitative and quantitative terms which meet the requirements of the audit process
	3.3 The technological factors relating to the business are identified and described in qualitative and quantitative terms which meet the requirements of the audit process
	3.4 The market characteristics of the business are identified and described in qualitative and quantitative terms which meet the requirements of the audit process

Element	Performance Criteria
	3.5 The competitive factors affecting the business are identified and described in qualitative and quantitative terms which meet the requirements of the audit process
4. Conduct an internal marketing (self) audit	4.1 *Criteria to use in the internal marketing audit* are identified in accordance with organisational requirements
	4.2 The marketing organisation including its formal structure, its functional efficiency and its internal interface within the organisation is described in accordance with organisational and audit requirements
	4.3 The marketing systems including the marketing information, planning, control and product/service/ideas systems of the organisation are described in accordance with organisational and audit requirements
	4.4 The marketing productivity of the organisation including its profitability and its cost-effectiveness is identified and the results recorded in accordance with organisational and audit requirements
5. Prepare a draft marketing audit Report	5.1 A marketing audit report is written in accordance with organisational requirements
	5.2 The marketing audit report meets the reporting requirements of the form/s of marketing audit selected
	5.3 The marketing audit report meets the requirements of the marketing plan

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
A marketing audit report is:	• a comprehensive description of the organisation's operations that forms part of the marketing planning and management audit of the organisation

Range Statement

Characteristics of a marketing audit may include:	• a comprehensive description of all major marketing activities of the organisation
	• an orderly sequence covering the organisation's macro and micro-environmental factors
	• the various forms that ensure the Marketing Audit is conducted in an objective and independent manner
	• periodic forms of audit
Criteria to use in an external marketing audit may include:	• consumer needs
	• product/service usage
	• demographics
	• material shortages
	• unemployment
	• interest rates and cost of capital
	• credit availability
	• forecast trends of size, growth, age, income, and regional distribution of population as they effect the organisation.
	• social and cultural factors
	• business and competitor characteristics
	• the general effects that changes in the law and politics may have on the organisation
	• the influence of technology on the operations and substitution of products and services on the organisation's business
External environmental factors may include:	• general economic and demographic environmental factors
	• business environmental factors
	• political, fiscal and legal environmental factors
	• social and cultural environmental factors
Criteria to use in an internal marketing audit may include:	• industry sources
	• existing research data and marketing information systems
	• organisation structures
	• internal data such as sales, promotions and product/service development
	• supply chain management and logistics

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Definition and purposes of a marketing audit
	• Knowledge of criteria to use in external and internal marketing analysis
Underpinning Knowledge • At this level the learner must demonstrate some relevant theoretical knowledge.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Organisation's business and marketing plan
	• Data collection techniques
	• Marketing audit forms
	• The elements of marketing planning
Underpinning Skills	• Literacy skills to identify relevant information, to write reports and to collect internal and external information
	• Communication including questioning, clarifying and reporting
	• Proofreading and editing skills to ensure clarity of meaning and conformity to organisational requirements of the marketing plan
	• Research skills
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

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Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 1	Level 1	Level 2	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to record marketing information
- **Communicating ideas and information** – to check the accuracy of information
- **Planning and organising activities** – to prepare the report within the required timeframe
- **Working with teams and others** – to gather and verify information
- **Using mathematical ideas and techniques** – for data checking and cross-referencing
- **Solving problems** – to meet timelines and organisational requirements
- **Using technology** – to record and check information if required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG304A   Assist with market research

Unit Descriptor

This unit specifies the outcomes required to support others in market research by assisting with the conduct and analysis of the research, and the preparation of reports.

Competency Field   *Business Development*

Domain   *Marketing*

Application of the Competency

The person requires a basic understanding and application of relevant theory and the ability to apply known solutions to a variety of predictable problems, using some discretion and judgement.

Element	**Performance Criteria**
Elements define the critical outcomes of a unit of competency.	The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.
1. Confirm own involvement in research	1.1 Market research plans are read and understood
	1.2 Purpose, objectives and required outcomes are clarified and confirmed with relevant person
	1.3 Own role and responsibilities are identified and confirmed
2. Assist with conducting market research	2.1 Survey tools are produced using *advanced software functions*
	2.2 Basic data and information are obtained from identified sources according to procedures
	2.3 Quality of data and information is checked
	2.4 Assistance to recruit respondents is provided
	2.5 Confirmation of respondent participation is made
	2.6 Assistance is provided to gather data and information from respondents
3. Assist with analysis of research information and preparation of reports	3.1 Data and *information entry into software files* is completed accurately and within designated timeframe
	3.2 Data and information are aggregated into categories using basic methods
	3.3 Assistance to prepare reports is provided

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include**:**	- award and enterprise agreements and relevant industrial instruments - relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination - relevant industry codes of practice
Advanced software functions may include:	- templates - alternate headers and footers - styles - tables - sort function - importing data/objects/pictures - sections - drawing tools - graphics tools
Assistance to recruit respondents may include:	- provision of information to respondents - gathering of respondent feedback to ensure their satisfaction with the process - reporting of issues, complaints and suggested process improvements to supervisor
Confirmation of respondent participation may include:	- obtaining clear agreement to participate - providing full details about participation (time, location and duration) - reconfirming attendance before event
Information entry into software files may include:	- entering text and numbers into word processing, spreadsheet and database software, including using assistive technologies where required - coding of data for transfer to punch cards or other types of recording systems
Assistance to prepare reports may include:	- creation of charts and tables - further minor research to clarify items - preparation of reports in organisational formats - storage/filing of reports according to organisational requirements

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they can produce a range of survey tools, collect and enter basic data and information into specified formats, relieve researchers in arranging respondents, and help to prepare reports. They must be able to accurately and efficiently check data and information and enter it into software files. They must be able to undertake basic data analysis.

Specific Evidence Requirements

Required knowledge and understanding include:	- organisational requirements for the input of data, for example: – computer procedures – file handling procedures – organisational styles and designs of documents and templates - market research policies and procedures relating to: – quality of data – confidentiality, privacy and ethics
Required skills and attributes include:	- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities - ability to use advanced software functions, for example: – word processing – creation of charts, tables and graphs – document design
Key competencies or generic skills relevant to this unit	The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit: Level (1) represents the competence to undertake tasks effectively Level (2) represents the competence to manage tasks Level (3) represents the competence to use concepts for evaluating and reshaping tasks The bulleted points provide examples of how the key competencies can be applied for this unit.
Communicating ideas and information (2)	- dealing with potential respondents and respondents - dealing with researchers to determine requirements and provide information

Collecting, analysing and organising information (2)	• obtaining data and information from identified sources
	• checking data and information for quality
Planning and organising activities (2)	• implementing schedules
	• organising the involvement of respondents
Working in a team (1)	• acting on instructions from researchers
Using mathematical ideas and techniques (1)	• using advanced software functions to create tables, charts, pictograms and other means of displaying information visually
Solving problems (1)	• low level problem-solving within established routines
Using technology (2)	• using a variety of software including use of advanced software functions
	• using assistive technology, if required
Innovation skills (–)	• not applicable

Products that could be used as evidence include:

- portfolio of evidence (such as designed survey tools, schedules, files with entered data and charts, tables and other elements produced)
- testimonials from third persons (e.g. respondents)
- demonstration of competence in real, simulated or hypothetical situations
- verbal or written responses to questions about processes and work requirements

Processes that could be used as evidence include:

- how data was checked for quality
- how respondents were dealt with when being recruited
- how assistance in preparing reports was provided

Resource implications for assessment include:

- copies of all relevant market research documentation (survey forms, tape recordings, interview notes and draft reports)

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- the provision of at least three market research projects where assistance has been given to researchers
- that examples may be either simulated projects or actual activities developed and implemented

| **Integrated competency assessment means:** | • that this unit can be assessed alone or as part of an integrated assessment activity involving other relevant units |

BSBMKG401A   Profile the market

Unit Descriptor   This unit covers segmenting the market, the selection of targeting strategies and tactics, the profiling of a target or target segments and the development of positioning strategies and implementation activities.

Consider co-assessment with BSBMKG402A Analyse consumer behaviour for specific markets, BSBMKG403A Analyse market data and BSBMKG404A Forecast market and business needs.

Competency Field   Business Development

Element	**Performance Criteria**
1. Segment the market	1.1 *Criteria* to use in segmenting the market are identified in accordance with the marketing plan
	1.2 *Sources of information for segmenting and profiling markets* are identified and accessed in accordance with the marketing plan
	1.3 The market is segmented in accordance with the selected criteria
	1.4 Market segments are reviewed for their usefulness in terms of size, potential, distinctive needs, easy identification of members, and/or distinctive media use patterns
	1.5 Market segment/s are selected to meet the requirements of the marketing plan, or new segmentation criteria are chosen and applied
2. Identify the target market	2.1 *Approach/es* to determining and describing the total market for a product or service are evaluated and chosen
	2.2 The target market is defined in terms of the consumers to be included as prospective users of a product or service, and in terms of the selected market segment/s
	2.3 Descriptions of the target market use segment descriptors
	2.4 Available marketing strategic options are identified and the *targeting strategy* that best meets the requirements of the marketing plan is selected

Element	Performance Criteria
3. Profile target audience	3.1 The total market and the selected market segment/s are described in the form of a consumer profile
	3.2 The consumer profile identifies *consumer characteristics* in *standard statistical terms* and/or the descriptive *terms* used in media selection
	3.3 *Demographic* and /or *psychographic* descriptions are used in the consumer profile in accordance with the requirements of the marketing plan
	3.4 The profile meets organisational requirements in terms of language, format, content and level of detail
4. Develop a positioning strategy	4.1 Available *positioning strategies* are identified and a strategy is chosen to meet *marketing* requirements and the consumer profile
	4.2 A positioning implementation plan is written in accordance with organisational requirements

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Market segmentation is:

- the process of dividing a market into consumer subgroups, each of which has different needs

Criteria to use in market segmentation may include:

- consumer needs
- benefits desired
- product/service usage
- attitude
- demographics
- lifestyle
- social and cultural factors
- business characteristics

Range Statement

Sources of information for segmenting and profiling markets may include:	• industry sources
	• existing research data
	• original a priori research (where the market segments are assumed at the beginning and research is used to confirm them)
	• original response based research
Approaches to determining the total market may include:	• identifying consumers with relevant needs
	• identifying current users of a product or service
	• identifying people with related characteristics
Targeting strategies may include:	• price sensitivity
	• sales volume
	• market share
	• purchasing power
	• ease of entry
	• growth considerations
	• differentiation and segmentation
	• niche markets
	• concentrated, differentiated and mass strategies
Consumers may include:	• individuals
	• businesses
	• households
Standard statistical terms:	• are those categories used by the Australian Bureau of statistics in collecting and reporting census data
Terms used to describe segments may include:	• demographics:
	• age
	• sex
	• education
	• marital status
	• occupation
	• nationality
	• first language
	• children
	• income

Range Statement

Demographic descriptions may include:	• date and place of birth • sex • nationality • indigenous Australian • education • occupation • marital status • first language • other languages spoken at home • number and age of children • income level • disability
Psychographic descriptions may include:	• activities • interests • opinions • values • attitudes • lifestyle
Positioning strategies may include:	• image perceptions • prestige and exclusive positioning • conspicuous positioning • service positioning • value positioning • market leader positions • market follower positions • Me-Too positioning • repositioning • competitive positioning
Marketing may include:	• marketing of goods • services marketing • ideas marketing • public sector marketing • direct marketing • telemarketing • business-to-business marketing

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria • Profile contains rationale and supporting information
Underpinning Knowledge * At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • Organisation's business structure, products and services • Organisation's business and marketing plan • Product and service standards and best practice models • Data collection and analysing techniques • Market mix • The elements of marketing planning
Underpinning Skills	• Literacy skills to identify relevant information, to write reports and to interpret internal and external information • Communication including questioning, clarifying and reporting • Research and analyse market segments • Identify the target market and select targeting and positioning strategies that meet organisation's requirements • Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement

- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package

- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment

- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

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Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 2	Level 2	Level 1	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – from primary and secondary research sources
- **Communicating ideas and information** – through development of an implementation plan
- **Planning and organising activities** – to gather data from a range of sources
- **Working with teams and others** – to determine segmentation criteria
- **Using mathematical ideas and techniques** – for data analysis
- **Solving problems** – to find 'best fit' positioning strategy
- **Using technology** – to record and analyse data as required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

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BSBMKG402A   Analyse consumer behaviour for specific markets

Unit Descriptor   This unit covers analysis of consumer behaviour to enable marketing to be targeted to specific markets and specific needs.

Consider co-assessment with BSBMKG401A Profile the market, BSBMKG403A Analyse market data and BSBMKG404A Forecast market and business needs.

Competency Field   Business Development

Element	Performance Criteria
1. Confirm product/service market	1.1 The market or market segment for a product or service is identified in accordance with the marketing plan
	1.2 Consumer attributes for the market or market segment are identified from the market profile
	1.3 Features of the product/service are identified in accordance with the marketing plan
2. Assess the reasons for existing levels of consumer interest	2.1 Consumer need for the product/service is investigated through analysis of trends and past performance
	2.2 Past *marketing* or positioning of a product/service is reviewed in relation to the effectiveness of its focus of appeal
	2.3 *Individual influences* on consumer behaviour are assessed and their impact estimated for a product/service
	2.4 *Social influences* on consumer behaviour are assessed and their impact estimated for a product/service
	2.5 *Lifestyle influences* on consumer behaviour are assessed and their impact estimated for a product/service
	2.6 *Organisational behaviour* is assessed in relation to a product or service in accordance with the marketing plan
3. Recommend a focus of appeal for marketing strategies for a product/service	3.1 Marketing strategies address innate and acquired needs of consumers and appeal to the motives that influence decision making
	3.2 A rationale for the focus of appeal is presented that outlines how influences on consumer behaviour will be used to target effective marketing strategies
	3.3 The focus of appeal meets *legal and ethical obligations* and the budgetary requirements of the marketing plan

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Information on the market or market segment may include:	• demographics • lifestyle • social and cultural factors • values or attitude factors • existing product usage
Marketing may include:	• marketing of goods • services marketing • ideas marketing • public sector marketing • direct marketing • telemarketing • business-to-business marketing
Individual influences may include:	• personality • self-image • perception • learning • beliefs • attitudes • past experience
Social influences may include:	• culture • socio-economic factors • family background • family decision-maker/s • social class

Range Statement

Lifestyle influences may include:	• leisure activities • interests • aspirations
Organisational behaviour may include:	• group decision making • new purchases • re-purchase • modified re-purchase • contract buying
Legal and ethical obligations may include:	• legislation, eg *Trade Practices Act* • regulations • codes of practice • ethical principles • policies and guidelines • society's expectations • cultural expectations and influences • social responsibilities eg protection of children, environmental issues

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria • Comparative importance of the influences on consumer behaviour for specific products/services for different markets
Underpinning Knowledge* * At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • Organisation's business structure, products and services • Organisation's marketing plan • Research methodology • Marketing objectives • Legal and ethical obligations

Evidence Guide

Underpinning Skills	• Literacy skills to identify consumer and product information, and to interpret legal requirements, company policies and procedures
	• Communication including questioning, clarifying, reporting
	• Research skills
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 2	Level 2	Level 1	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to identify product and consumer information

- **Communicating ideas and information** – through the recommended focus of appeal and rationale

- **Planning and organising activities** – to conduct research

- **Working with teams and others** – to gather information from a range of sources

- **Using mathematical ideas and techniques** – for trend analysis

- **Solving problems** – to assess the relative importance of a range of influences

- **Using technology** – for recording and analysing data if required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG403A   Analyse market data

Unit Descriptor   This unit covers analysis of market data to assist in targeting marketing activities and drawing up a marketing plan.

This unit is related to BSBMKG301A Research the market. Consider co-assessment with BSBMKG401A Profile the market, BSBMKG402A Analyse consumer behaviour for specific markets, and BSBMKG404A Forecast market and business needs.

Competency Field   Business Development

Element

Performance Criteria

1. Interpret *trends and market developments*

  1.1 *Statistical analysis* of market data is used to interpret market trends and developments

  1.2 Trends and developments are analysed for their potential impact on the business

  1.3 Measures of central tendency / dispersion and correlations between sets of data are used for quantitative interpretation of comparative market data

  1.4 Qualitative analysis of comparative market information is performed as a basis for reviewing business performance

2. Interpret competitor market performance

  2.1 The market performance of existing and potential competitors and their products or services is analysed to identify potential *opportunities* or threats

  2.2 Business performance is compared to that of competitors to identify market position

3. Report on market data

  3.1 Data is prepared, plotted and interpreted for visual presentation

  3.2 Visual presentation is assessed for potential problems, and corrective action taken if necessary

  3.3 Report meets organisational requirements in terms of content, format and level of detail

  3.4 Report is submitted within the required timeframe

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Trends and developments may include:	• economic trends (local, regional, national, international) • ecological/environmental trends • Government activities eg interest rates, deregulation • social and cultural factors • demographic trends • changes in technology • industrial trends
Statistical analysis may include:	• sampling • measures of central tendency • measures of dispersion • nature and degree of relationship between variables • time series analysis • normal distribution probability curve
Measures of central tendency and correlations may include:	• mean • median • mode • for grouped or ungrouped data • cross-tabulations • Z, T and chi square tests
Comparative market information may include:	• best practice information • international benchmarking • inter-firm comparison data

Range Statement

Opportunities may include:	• potential for greater penetration of existing markets with existing products or services
	• new products or services for existing markets
	• new products or services for new markets
	• extending, expanding or otherwise changing an existing business
	• joint ventures
	• cooperative ventures
	• strategic alliances
	• franchising
	• exports
Legal and ethical constraints may include:	• legislation, eg Trade Practices Act
	• regulations
	• codes of practice
	• ethical principles
	• policies and guidelines
	• society's expectations
	• cultural expectations and influences
	• social responsibilities eg protection of children, environmental issues

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Reasons for conclusions drawn from interpretation of data
	• Knowledge of statistical techniques and elementary probability concepts

Evidence Guide

Underpinning Knowledge*	
* At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Organisation's business structure, products and services
	• Sources of market and comparative data
	• Business competitors
	• Statistical reporting format/s
	• Computing especially spreadsheets, statistical packages and Internet

Underpinning Skills	
	• Literacy skills to identify sources of information, to write reports and to interpret information
	• Communication including questioning, clarifying, reporting
	• Numeracy skills for basic statistical techniques and elementary probability
	• Research skills
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 2	Level 1	Level 1	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to interpret market information
- **Communicating ideas and information** – on the interpretation of data in report format
- **Planning and organising activities** – to source comparative data
- **Working with teams and others** – to collect and analyse information
- **Using mathematical ideas and techniques** – for statistical and probability calculations
- **Solving problems** – to analyse and correct visual presentations
- **Using technology** – to record and analyse data if required

 Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG404A   Forecast market and business needs

Unit Descriptor	This unit covers the gathering of market intelligence to forecast market and business needs.
	This unit is related to BSBMKG303A Draft an elementary marketing audit report. Consider co-assessment with BSBMKG401A Profile the market, BSBMKG402A Analyse consumer behaviour for specific markets, and BSBMKG403A Analyse market data.
Competency Field	Business Development

Element	Performance Criteria
1. Build and maintain networks	1.1 Time is allocated to establish and maintain business contacts
	1.2 Participation in *business associations*, and/or *professional development activities* is used to establish and maintain a *network* of support for the business and enhance personal knowledge of the market
	1.3 Communication channels are established to exchange *information and ideas*
	1.4 Input is provided to the network and feedback sought and verified
2. Review current business performance and capability	2.1 Core activities, customer base, business values and current business direction are confirmed
	2.2 Current marketing *performance* and the effectiveness of past *marketing* or positioning is *identified*
	2.3 *Performance data* from all *areas of the business* are reviewed to identify strengths, weaknesses and critical success factors
	2.4 Current *capabilities and resources* are identified and assessed to identify areas for improvement or exploitation
	2.5 Under-performing products or services are identified for re-development or withdrawal
	2.6 The strength and current competitive position of the business is confirmed

Element	Performance Criteria
3. Evaluate the market	3.1 *Trends and developments* are identified and analysed for their potential impact on the business
	3.2 *Comparative market information* is gathered and analysed as a basis for reviewing business performance
	3.3 The market performance of existing and potential competitors and their products or services are analysed to identify potential *opportunities* or threats
	3.4 *Sources of intelligence* are identified and tapped for advance warning of new products/services/technology or new markets for the business
	3.5 The *legal, ethical and environmental constraints* of the market are identified and analysed for their effect on the business
4. Articulate the needs of the market and the business	4.1 Poor or under-servicing of existing market needs by the organisation and/or its competitors is identified and detailed
	4.2 Changes in the market that link positively to the organisation's strengths or capabilities are identified
	4.3 The advantages and disadvantages of *forecasting techniques* are considered in relation to the required outcome and technique/s selected in accordance with organisational requirements
	4.4 Emerging market needs are forecast and justified in terms of available information
	4.5 The needs of the business are identified in terms of changes required to improve performance or address a market opportunity

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Business associations may include:	• professional associations • industry bodies
Professional development activities may include:	• industry information seminars • industry training • trade shows • fairs • demonstrations • technical information briefings • pre-launch activities • Occupational Health and Safety policy and procedures in relation to personnel safety ie people working in locations remote from principal location – OHS requirements cover communications' provision and travel
Networks may be:	• formal • informal • personal • business • professional • individuals • groups • organisations
Information and ideas may include:	• information on competitors' activities • changing customer requirements • changes in the environment • personal, professional or for business support

Range Statement

Trends and developments may include:	• economic trends (local, regional, national, international)
	• ecological/environmental trends
	• Government activities eg interest rates, deregulation
	• social and cultural factors
	• demographic trends
	• changes in technology
	• industrial trends
Comparative market information may include:	• best practice information
	• international benchmarking
	• inter-firm comparison data
Opportunities may include:	• potential for greater penetration of existing markets with existing products or services
	• new products or services for existing markets
	• new products or services for new markets
	• extending, expanding or otherwise changing an existing business
	• joint ventures
	• cooperative ventures
	• strategic alliances
	• franchising
	• exports
Sources of intelligence may include:	• peers
	• databases
	• Internet
	• government agencies
	• official statistics
	• business advisory services
	• professional/trade associations
	• financial institutions
	• national and international publications
Occupational Health and Safety considerations may include:	• employee safety at events and during research
	• safety issues associated with proposed products or services (duty of supplier, importer and manufacturer)

Range Statement

Legal, ethical and environmental constraints may include	• legislation, eg Trade Practices Act and Occupational Health and Safety legislation
	• regulations
	• codes of practice
	• policies and guidelines
	• ethical principles
	• society's expectations
	• cultural influences
	• social responsibilities
Forecasting techniques may include	• top down forecasting
	• bottom up forecasting
	• projection
	• model building
	• surveys of intentions
	• Delphi techniques
	• scenario planning
Marketing performance evaluation may include	• product portfolio analysis
	• comparative analysis
	• competitive analysis
	• life cycle models
	• strengths-weaknesses-opportunities-threats (SWOT) analysis
	• value chain analysis
Performance data may include:	• share
	• penetration
	• coverage
	• sales
	• profitability
	• production time and cost
	• faults
	• warranties
	• accidents
	• complaints

Range Statement

Areas of the business may include:	• marketing • finance • production • personnel

Capabilities and resources may include:	• situational factors such as:
	  • location/position
	  • transport distribution channels
	  • 24 hour operation
	  • communications
	  • level of technology
	  • age and life of business equipment
	  • industrial relations climate
	• competency of staff relative to business needs
	• capacity of equipment relative to current output
	• human and financial resources
	• intangibles such as:
	  • service
	  • brand
	  • image
	  • style
	  • perceived quality or value
	  • social acceptability
	  • 'feel good' factor

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria • Documentation of the decision making process and outcomes of the market evaluation and business review with supporting evidence

Evidence Guide

Underpinning Knowledge* * At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • Organisation's policies, plans and procedures • Techniques for building relationships of trust, including with people from other cultures • Techniques for facilitating mutually acceptable outcomes • Related organisations and agencies and networks • Principles and operation of networks • Sources of information • Marketing performance evaluation tools • Forecasting methodology • Concept of marketing mix • Legal, ethical and environmental issues • Occupational hazards and risks
Underpinning Skills	• Literacy skills to identify market information, trends and developments, to write in a range of styles for different audiences and to interpret legal requirements • Communication skills including reporting, clarifying and questioning • Networking skills to participate with other groups • Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities • Numeracy skills for time management, data analysis • Evaluation and forecasting skills • Management of OHS hazards and risks ie identify hazards, assess and control risks to health and safety of workplace personnel
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 3	Level 2	Level 2	Level 2	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to evaluate the market and the business
- **Communicating ideas and information** – to contribute to business networks
- **Planning and organising activities** – to conduct reviews
- **Working with teams and others** – to build and maintain networks
- **Using mathematical ideas and techniques** – to analyse data and draw conclusions
- **Solving problems** – to identify strengths and weaknesses of the business
- **Using technology** – to organise and analyse data, if required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG405A   Implement and monitor marketing activities

Unit Descriptor   This unit covers the implementation of marketing strategies and the monitoring and improvement of market performance.

This unit is related to BSBMKG504A Implement a marketing solution. Consider co-assessment with BSBMKG406A Build client relationships.

Competency Field   Business Development

Element	Performance Criteria
1. Review the *marketing mix* for the business	1.1 The balance of product mix, volumes and *pricing* is reviewed to optimise sales and profit
	1.2 Customer needs and preferences are considered in determining the marketing mix
	1.3 The costs and benefits of using different *distribution channels* and/or providing different *levels of customer service* are evaluated and the results considered in determining the marketing mix
	1.4 A marketing mix is determined that best satisfies *marketing* and business needs and addresses customer requirements
2. Implement marketing activities	2.1 Marketing activities are prioritised and resources obtained for their implementation
	2.2 Persons involved in the marketing effort are briefed on their roles and responsibilities as members of a self-managed team to ensure the success of marketing strategies
	2.3 *Promotional activities* are implemented in accordance with marketing objectives and budgetary requirements
	2.4 Responsibility is assigned for ongoing monitoring of marketing activities and evaluation of business performance against objectives and targets
	2.5 Implementation of marketing activities meets *legal and ethical requirements*

Element	Performance Criteria
3. Monitor and review marketing performance	3.1 Progress against performance targets is monitored, performance gaps analysed and corrective action taken
	3.2 Over-performance against targets is analysed for trends and new targets set
	3.3 Staff are encouraged to propose ways to improve marketing performance
	3.4 *Customer reaction* to all aspects of the marketing mix is obtained to improve targeting and outcomes
	3.5 Ongoing research of customer and business requirements is conducted to identify *opportunities for change and improvement* and their timing
	3.6 Changes in market phenomena are analysed for new business opportunities

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Marketing mix may include:

- product or service variables such as:
  - technical features
  - design
  - quality
  - range
  - safety features
- pricing
- promotion
- distribution
- level of service

Pricing considerations may include:

- cost of ownership
- price point chosen

Range Statement

- cost plus margin
- cost relative to competitors
- demand orientation
- credit terms
- discount percentages
- discount structure
- financial deals
- leasing arrangements
- stage payments
- psychological elements
- residual value
- sales (end of season etc)
- special offers

Distribution channels may include:

- e-business
- self-access
- wholesale
- retail
- distributor
- delivery service
- mail order
- telesales
- dealer
- re-seller
- franchisee

Level of customer service may include:

- no customer service
- sales assistance for problems/queries only
- one-on-one personal service
- after sales service
- call centre support
- electronic customer service

Marketing may include:

- marketing of goods
- services marketing
- ideas marketing
- public sector marketing
- direct marketing
- telemarketing
- business-to-business marketing

Range Statement

Promotional activities may include:	• advertising in national newspapers, suburban or local newspapers
	• word of mouth
	• referral
	• testimonials
	• professional/industry journals
	• advertising on radio or television
	• mail drops
	• display posters
	• canvassing and telephone canvassing
	• exhibitions / presentations
	• sponsoring local community events
	• in-store promotions
	• the development of networks and strategic alliances
	• staff development programs to enhance customer service orientation
	• electronic advertising
Legal and ethical requirements may include:	• legislation, eg *Trade Practices Act*
	• regulations
	• codes of practice
	• ethical principles
	• policies and guidelines
	• society's expectations
	• cultural expectations and influences
	• social responsibilities
	• safety issues
	• security and privacy issues
	• environmental issues
	• occupational health and safety considerations ie
	• establishing procedures for staff safety and security at promotional events
	• safe handling of equipment and substances
	• safety of members of the public attending events
	• health and safety arrangements for contractors
	• safety of staff working in remote and isolated locations eg communication arrangements

Range Statement

Customer reaction may be determined through:	• survey/other feedback mechanisms
	• informal discussion
	• customer meetings
	• focus groups
	• sales to contact ratio
	• commercial services such as SAMI, Neilson, scanner data, Morgan omnibus surveys and panels etc
Opportunities for change and improvement may include:	• product/service configuration
	• raw materials
	• packaging
	• delivery times/quality
	• pricing structure
	• market positioning
	• ancillary services
Occupational Health and Safety issues may include:	• health and safety of employees
	• public safety during marketing events
	• ensuring operational/organisational changes to work organisation don't introduce new hazards to health and safety of employees

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Rationale for marketing mix and strategies prioritised for implementation
	• Strategies aligned with the marketing plan and overall business plan
Underpinning Knowledge* * At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Organisation's business and marketing plan
	• Marketing mix
	• Methods of analysing costs and benefits of marketing strategies

Evidence Guide

- Methods of monitoring customer satisfaction
- Legal and ethical requirements
- Occupational Health and Safety arrangements and responsibilities associated with marketing and promotional activities

Underpinning Skills	- Literacy skills to research and interpret information
	- Communication skills including questioning, clarifying, reporting, relating to different audiences
	- Numeracy skills for data analysis
	- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
	- Business planning
	- developing and implementing Occupational Health and Safety procedures to reduce health and safety risks
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 2	Level 2	Level 2	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to review the marketing mix and monitor marketing performance

- **Communicating ideas and information** – to consult with stakeholders and brief the marketing team

- **Planning and organising activities** – to implement promotional activities

- **Working with teams and others** – to achieve marketing outcomes

- **Using mathematical ideas and techniques** – to research the needs of the market

- **Solving problems** – to determine the optimal marketing mix

- **Using technology** – to store and analyse data if necessary

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG406A   Build client relationships

Unit Descriptor   This unit covers the establishment, maintenance and improvement of client relationships to support attainment of key business outcomes.

Consider co-assessment with BSBMKG405A Implement and monitor marketing activities.

Competency Field   Business Development

Element

Performance Criteria

1. Initiate interpersonal communication with clients

1.1   Preferred client communication styles and methods are identified and used

1.2   *Verbal and non-verbal communication* processes are used to establish rapport with clients

1.3   Active listening is utilised to establish rapport with clients

1.4   Opportunities to offer positive feedback to the client are investigated and acted upon

1.5   Open questions are used to promote two way communication

1.6   Potential *barriers to effective communication* with clients are identified and acted upon

1.7   Communication processes initiated identify client needs, preferences and expectations

2. Establish client relationship management strategies

2.1   Client loyalty objectives are developed to focus on the development of long term business partnerships

2.2   Client profile information is assessed to determine approach

2.3   *Client loyalty strategies* are developed to attract and retain clients in accordance with the business strategy

2.4   *Client care* and client service standards are identified and applied

3. Maintain and improve ongoing relationships with clients

3.1   Strategies are developed to establish processes for obtaining ongoing *feedback* from clients to monitor satisfaction levels

3.2   Strategies developed to elicit feedback provide information in a form that can be utilised to improve relationships with clients

3.3   Feedback obtained is used to develop and implement strategies to maintain and improve relationships with clients

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Client definition:	• *client* is used as the generic description for a person or organisation who receives (or has the potential to receive) products, services or ideas supplied by the organisation. The term "client" may be translated according to the user's context as "customer", "consumer", "member", "patient", or other title.
Client loyalty strategies include:	• client clubs • credit or discount facilities • client reward schemes • a phone call thanking the client for the business • a handwritten note thanking the client • a formal letter of thanks • offering promotional items
Verbal communication includes:	• clarity of speech • articulation • voice modulation • voice projection • language • questioning skills • listening skills • feedback

Range Statement

Non-verbal communication includes:
- gestures
- posture
- body orientation
- facial expression
- voice
- touching
- distance
- clothing

Barriers to effective communication may include:
- cultural differences
- stereotypes
- word choice
- non verbal communication
- voice modulation and articulation
- not listening actively
- physical, personal, and age differences
- educational differences
- organisational

Client care refers to:
- all the of activities that are required to provide client satisfaction

Feedback may be obtained through:
- survey instruments
- telephone
- email
- letter

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Demonstration of effective interpersonal communication skills which initiate and build ongoing positive relationships with clients
Underpinning Knowledge* * At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Understanding of client service standards
	• Knowledge of key concepts in the communication process
	• Understanding of the range of verbal non-verbal communication techniques which can be used to convey meaning
	• Knowledge of strategies for determining the extent to which client requirements are being met
Underpinning Skills	• Client service skills including the ability to determine client needs and preferences
	• Active listening skills
	• Questioning skills
	• Information management skills, including the ability to summarise information though written and verbal means
	• Networking skills
	• Literacy skills used in the clarification of issues
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 2	Level 1	Level 1	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** - to inform the development of a strategy to strengthen client relationships
- **Communicating ideas and information** - through verbally clarifying client needs and preferences
- **Planning and organising activities** - through implementing a strategy to strengthen client relationships
- **Working with teams and others** - by discussing with others in the organisation the application of client service standards
- **Using mathematical ideas and techniques** - by processing client feedback survey forms
- **Solving problems** - by developing a strategy to respond to respond to a client's negative feedback
- **Using technology** - to complete Internet based research if required on strategies to strengthen client relationships

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG407A   Make a presentation

Unit Descriptor   This unit covers the preparation, delivery and review of a presentation to a target audience.

Competency Field   Business Development

Element	Performance Criteria
1. Prepare the presentation	1.1 Written preparation is undertaken to support delivery of the presentation
	1.2 Outcomes for the presentation are determined to provide focus
	1.3 *Presentation strategies* are chosen to match the *characteristics* of the target audience, the location, the resources and the personnel needed
	1.4 *Presentation aids and materials* are selected to enhance audience understanding of key concepts and ideas
	1.5 A strategy for evaluating the effectiveness of the presentation is prepared
	1.6 Presentation is scheduled to meet the requirements of the target audience, any other personnel needed and the location
2. Deliver a presentation	2.1 The desired outcomes of the presentation are explained to, and discussed with the target audience
	2.2 Presentation aids, materials and examples are used to support target audience understanding of key concepts and ideas
	2.3 Non verbal and verbal communication of participants is monitored to promote attainment of presentation outcomes
	2.4 Opportunities are provided for participants to seek clarification on key ideas and concepts and the presentation is adjusted to meet participant needs and preferences
	2.5 Key concepts and ideas are summarised at strategic points to facilitate participant understanding
	2.6 Variations in verbal and non-verbal communication are used to maintain participant engagement

Element	**Performance Criteria**
3. Review the presentation	3.1 A *review strategy* is implemented to determine the effectiveness of the presentation
	3.2 The strategy selected utilises feedback from participants
	3.3 The reactions of key personnel to the delivery are sought and discussed
	3.4 Adjustments to delivery are considered and incorporated

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Delivery may be :	• face to face • via teleconferencing • via closed circuit television • through computer assisted methods
Presentation strategies may involve:	• oral presentations • discussion • questioning • simulations and role-play • case studies • group and/or pair work • demonstration

Range Statement

Characteristics of the target audience may relate to:	• language, literacy and numeracy needs • cultural and language background • educational background or general knowledge • gender • age • physical ability • previous experience with the topic
Presentation aids and materials may include:	• video and audio recordings • overhead projector • paper-based materials • models • diagrams, charts and posters • whiteboard • computer simulations and presentations
Review strategies may include use of:	• one on interviews with participants and other personnel • focus groups interviews • written feedback provided by participants • action research • critical "friends"

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria • A real or simulated presentation which meets the information needs of the target group.
Underpinning Knowledge* * At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • Range of presentation strategies • Range of presentation aids and materials available to support presentations • Data collection methods that can be used to support review of presentations

Evidence Guide

- Key principles association with explanation and demonstration of concepts and ideas

Underpinning Skills

- Literacy skills to prepare presentation information, and write in a range of styles for different target audiences
- Communication including questioning, clarifying, re-phrasing
- Presentation skills
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- Ability to utilise verbal and non-verbal techniques to sustain participant engagement

Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Context/s of Assessment

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 3	Level 2	Level 2	Level 1	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** in preparing information to present to a target audience
- **Communicating ideas and information** through using presentation aids and materials to support verbal explanation of concepts and ideas.
- **Planning and organising activities** in scheduling the presentation and in ensuring materials and equipment are available
- **Working with teams and others** to coordinate the input of all personnel at the presentation
- **Using mathematical ideas and techniques** in presenting numerical data to support a key idea or concept
- **Solving problems** in deciding how to adjust a presentation during delivery to meet target audience needs
- **Using technology** in demonstrating audio and visual materials to support a presentation

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG408A   Conduct market research

Unit Descriptor   This unit specifies the outcomes required to implement all aspects of a market research plan (with the exception of specialist statistical design and analysis). It involves conducting research, developing survey tools, recruiting respondents, gathering data and information from respondents, analysing research information, and preparing research reports.

Competency Field   *Business Development*

Domain   *Marketing*

Application of the Competency   This unit covers the conduct of market research by non-specialist market research personnel who nonetheless have data and information gathering and analysis as a major part of their role and who may work in areas such as marketing, communications, strategic planning and organisational development.

Underpinning the unit is a good general knowledge of market research principles and practices, and the ability to refine and implement plans.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Italicised terms are elaborated in the Range Statement.

1. Conduct desk research

1.1 *Desk research sources* are identified

1.2 *Information collection and collation tools and methods* are drafted, tested and amended as required

1.3 *Reporting formats* are determined

1.4 Desk research is conducted

1.5 Information is reported in approved formats

2. Develop survey tools

2.1 *Hypotheses* are developed for testing

2.2 *Options* are developed for quantification

2.3 *Survey tools* are drafted

2.4 Survey tools are tested and amended as required

2.5 Methods of data and information extraction and collation are determined and tested

3. Recruit respondents

3.1 Market research plans are interpreted to specify respondent requirements

3.2 *Potential respondents* are identified in line with *research and organisational requirements*

3.3 *Respondent recruitment* is effected

4. **Gather data and information from respondents**	4.1	*Facility* and equipment for data gathering are arranged and prepared
	4.2	Survey tools are prepared
	4.3	Information and data are gathered using survey tools
	4.4	Information is reported in approved formats
	4.5	Survey tools are stored and safeguarded
5. **Analyse research information**	5.1	*Check* is made of the quality of data and information collected
	5.2	*Appropriate techniques* to summarise data and information are selected, according to research requirements
	5.3	*Software files* for the entering of data and information are designed
	5.4	Data is processed using a method appropriate to the research task
	5.5	*Interpretation and aggregation of data and information* is carried out including *categorisation* to provide observations relevant to research objectives
6. **Prepare research reports**	6.1	Observations are interpreted and aggregated to provide findings in a format suitable for interpretation, dissemination and decision-making
	6.2	Findings are assessed for relevance and usefulness to research objectives
	6.3	Final *structure* of reports are determined
	6.4	*Research reports* are prepared
	6.5	Research findings are communicated to relevant personnel

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
Desk research sources may include:	• review of published/internet data and information from:
	– industry associations and trade media

	– government bodies
	– business advisors
	– clients and suppliers
	– conferences, speeches, reports to regulatory or funding bodies, reports from trade or professional associations, annual reports, articles and advertisements
	– other research projects
	• review of enterprise information:
	– sales and/or attendance figures
Information collection and collation tools and methods may include:	• forms for recording information sources reviewed
	• procedures about abstracting key information and citing sources
	• rules for including or not including information and data reviewed
Reporting formats may include:	• prose reports
	• verbal presentations
	• visual aids (photographs, charts and tables)
Hypotheses include:	• propositions of relevance to the research objectives generated through desk research and formal or informal input to the enterprise and believed to be worthy of further testing
Options include:	• possible responses to hypotheses to be quantified through research
Survey tools may include:	• questionnaires
	• small group discussion schedules
	• one-on-one discussion schedules
	• handouts, overhead transparencies or other material required to brief respondents
Potential respondents may include:	• persons identified from lists or directories
	• current, past or potential clients
	• key stakeholders
	• staff
Research and organisational requirements may include:	• need for respondent to meet demographic or psychographic (attitudes/values/beliefs/behaviours) criteria
	• need for respondent to represent an organisation, have specific expertise or knowledge, or meet other criteria
	• requirements for statistical validity (or not) in sampling

	• quality assurance policy and procedures
	• legal requirements
Respondent recruitment may include:	• confirming potential respondent characteristics
	• respondent briefing on requirements, costs and benefits of involvement
	• provision of supplementary information on project
	• obtaining permission for involvement where required by minors or organisational respondents
Facility preparation and arrangements may include:	• research into, and choice of, appropriate facility (i.e. room(s), building)
	• obtaining of appropriate facility
	• organisation of tables, chairs, audio and visual equipment, refreshments or other requirements
	• preparation to record proceedings
Check of data and information for quality may include:	• keeping of records on data sources, copyright and privacy information
	• ensuring that others collecting data and information have studied and understood instructions
	• ensuring that data and information are authentic and fabrication has not occurred
	• ensuring data is accurate, complete, adequately-expressed and a true record of interview
	• where required, verifying records of interview with respondents
	• rejection of inadequate data and resurveying to overcome gaps
	• reporting to senior personnel on issues and problems in data collection
Appropriate techniques for data manipulation may include:	• statistical overview
	• charts and tables
	• statistical detailed analysis
	• mode
	• median
	• mean
	• range
	• variance
	• standard deviation
	• coefficient of variation
	• percentile
	• prose commentary

Software files for entering data and information may include:	• word processing programs with specified heading structures, text and table formats
	• spreadsheets with specified axes
	• databases with specified forms and fields
Interpretation and aggregation of data and information may include:	• statistical analysis of raw data using general or specialist software
	• development of further hypotheses based on initial processing of raw data, and statistical tests of these hypotheses
Categorisation may include:	• creation of report table of contents with headings and subheadings under which data and information are organised
	• development of basic market segmentation categories (by demographic or psychographic characteristics)
	• data tabulation in a format appropriate for the type of analysis to be performed
Structure may include:	• using tables and charts
	• using a particular software application
	• incorporating graphics and pictures
	• adding headers and footers
	• use of legends
	• inserting symbols
Research reports may include:	• explanation of methodology
	• key summaries of data
	• key observations and findings
	• recommendations and implementation issues
	• recommendations for future research
	• detailed data analysis
	• references, citations and other correct acknowledgement for all non-original material
	• protection of confidentiality in accordance with law and procedures

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competency in this unit must be able to implement all aspects of a research plan (except specialist data analysis procedures requiring statistical training) resulting in a comprehensive report with findings that satisfy the research objectives.

Specific Evidence Requirements

Required knowledge and understanding include:	• market research principles and practices, including:
	   – the roles and uses of qualitative and quantitative research
	   – the development and use of hypotheses
	   – the design of samples
	   – the use of survey instruments
	   – data processing methods and data analysis techniques
	   – research reporting formats

Required skills and attributes include:	• ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities • ability to locate information sources, and analyse and summarise them to specified formats • ability to conceptualise, test and refine qualitative and quantitative questionnaires and other tools • ability to identify and recruit research respondents • ability to conduct interviews and small group discussions • ability to analyse and categorise information gathered • ability to reach conclusions and make recommendations based on information gathered • ability to develop reports
Key competencies or generic skills relevant to this unit	The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit: Level (1) represents the competence to undertake tasks effectively Level (2) represents the competence to manage tasks Level (3) represents the competence to use concepts for evaluating and reshaping tasks The bulleted points provide examples of how the key competencies can be applied for this unit.
Communicating ideas and information (1)	• interviewing respondents and conducting group discussions
Collecting, analysing and organising information (3)	• conducting desk research

Planning and organising activities (2)	• developing and implementing the detail of market research plans
Working in a team (1)	• working with other researchers as required
Using mathematical ideas and techniques (1)	• using basic statistical techniques and instruments (charts, tables, graphs) to perform basic statistical analyses
Solving problems (2)	• developing and refining efficient, comprehensive survey tools that collect maximum useful data and information with minimum resources
Using technology (2)	• using software programs to process data • using assistive technology, if required
Innovation skills (2)	• developing questionnaires and other tools

Products that could be used as evidence include:

- desk research reports
- survey tools (unused and completed)
- respondent recruitment schedules
- records of interview and group discussions
- draft research reports
- final research reports

Processes that could be used as evidence include:

- how desk research resources were located
- how decisions were made on usefulness and summarisation of data and information
- how survey tools were developed
- how reporting formats were determined
- how respondents were identified, liaised with and recruited
- how respondents were interviewed or surveyed
- how data was interpreted and aggregated into categories

Resource implications for assessment include:

- exemplar survey tools, survey tools recently used
- relevant computer hardware and software
- documentation of enterprise policies and procedures

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment

- that at least three examples of market research plans being implemented are provided, involving desk research, the design of qualitative and quantitative survey tools, individual interviews, group discussions, data and information collation and basic statistical analysis and report preparation

- that examples can be either simulated projects or actual activities developed and implemented

Integrated competency assessment means:

- that this unit can be assessed alone or as part of an integrated assessment activity involving other related marketing units and general work skills

BSBMKG501A   Evaluate marketing opportunities

Unit Descriptor   This unit covers evaluating market data, distinguishing the characteristics of possible markets and assessing the viability of making changes to current operations to take advantage of marketing opportunities.

This unit is related to BSBMKG302A Identify marketing opportunities. It leads to BSBMKG 605A Evaluate international marketing opportunities.

Competency Field   Business Development

Element	Performance Criteria
1. Identify marketing opportunities	1.1 *Information* on the needs of the *market* and the *business* is analysed to identify *marketing* opportunities
	1.2 Potential *new markets* are researched and opportunities to enter, shape or influence the market are assessed in terms of likely *contribution to the business*
	1.3 Entrepreneurial, innovative approaches and creative ideas are explored for their potential business application, and developed into potential marketing opportunities
2. Investigate marketing opportunities	2.1 Opportunities are identified and analysed in terms of their likely fit with the organisation's goals and capabilities
	2.2 Each opportunity is *evaluated* to determine its impact on current business and customer base
	2.3 An assessment of *external factors*, costs, benefits, risks and opportunities is used to determine the financial viability of each marketing opportunity
	2.4 Probable return on investment and potential competitors are determined
	2.5 Marketing opportunities are described and ranked in terms of their viability and likely contribution to the business

Element	Performance Criteria
3. Evaluate required changes to current operations	3.1 Changes needed to current operations to take advantage of viable marketing opportunities are identified and documented
	3.2 Organisational changes to service an increased/different customer base include provision for continued quality of service to existing customers
	3.3 *Resource requirements* for changed operations are estimated
	3.4 The viability of making changes to current operations is determined and communicated to *key stakeholders*

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
Market and business information may include:	• market trends and developments
	• comparative market information
	• competitors' performance
	• customer requirements
	• new and emerging markets
	• legal and ethical requirements
	• sales figures
	• market share
	• profitability

Range Statement

Marketing may include:	• marketing of goods
	• services marketing
	• ideas marketing
	• public sector marketing
	• direct marketing
	• telemarketing
	• business-to-business marketing
New markets may include:	• segment of the market not currently penetrated
	• export market
	• e-commerce
Contribution to the business may include:	• effect on sales volume
	• market share
	• profitability
	• growth
Evaluation decisions may include:	• knock out factors
	• scored criteria
	• weighted criteria
	• present value analysis
	• return on investment
External factors may include:	• legislation, eg Trade Practices Act
	• regulations
	• codes of practice
	• policies and guidelines
Resource requirements may include:	• research and development
	• equipment
	• re-tooling
	• additional staff
	• staff training
	• production costs
	• promotional costs
	• distribution costs

Range Statement

Key stakeholders may include:	• marketing personnel
	• finance staff
	• managers
	• supervisors
	• production staff
	• human resource staff
	• owner/s
	• board of directors

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Documentation of processes for identifying new markets and finding entrepreneurial, innovative and creative options

Underpinning Knowledge*	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
* At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.	• Organisation's business structure, products and services
	• Organisation's marketing plan
	• Sources of market information
	• Marketing performance evaluation tools
	• Forecasting methodology
	• Viability analysis methods
	• Concept of marketing mix
	• Legal and ethical issues

Evidence Guide

Underpinning Skills	• Literacy skills to identify and interpret market information, to write in a range of styles for different audiences and to document outcomes and requirements
	• Communication skills including questioning, clarifying, reporting
	• Numeracy skills for data analysis, estimation, cost-benefit analysis
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 3	Level 2	Level 2	Level 1	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to identify marketing opportunities
- **Communicating ideas and information** – to inform stakeholders
- **Planning and organising activities** – to change current business operations
- **Working with teams and others** – to involve stakeholders in the pre-planning stages of business change
- **Using mathematical ideas and techniques** – to conduct cost-benefit analysis and for estimating
- **Solving problems** – match capability with market or business needs
- **Using technology** – for data analysis, if necessary

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG502A   Establish and adjust the marketing mix

Unit Descriptor   This unit covers the determination of optimum marketing mix for a business through analysis of inter-related marketing components.

     This unit is related to BSBMKG602A Develop a marketing plan.

Competency Field   Business Development

Element	**Performance Criteria**
1. Evaluate the significance of each component of the *marketing mix* and their inter-relationships	1.1 Key *characteristics* of products/services are identified and their significance to the market estimated
	1.2 Pricing policy is reviewed and *pricing variables* analysed to determine their effect on demand
	1.3 *Promotional method/s* are analysed to determine their importance to *marketing* outcomes
	1.4 *Channel/s of distribution* are reviewed and their significance to marketing outcomes estimated
	1.5 The *level of customer service* provision is identified and analysed to determine its significance to marketing outcomes
	1.6 Potential customer base and key pressure points for success are identified
	1.7 The effect of the components of the marketing mix on each other is analysed, and their relative importance to the customer base established
2. Determine the marketing mix for specific markets	2.1 Environmental factors are identified and assessed for their impact on the marketing mix
	2.2 Consumer priorities that affect the marketing mix are identified
	2.3 Product, pricing, promotional, distribution and service variations are considered and evaluated against marketing objectives and target market characteristics
	2.4 A marketing mix is selected that best satisfies the target market and meets marketing objectives
	2.5 The marketing mix decision meets organisational, strategic and operational marketing objectives

Element	**Performance Criteria**
3. Monitor and adjust marketing mix	3.1 The marketing mix is monitored against marketing performance and components isolated for testing
	3.2 The implications of altering one or more components of the marketing mix are evaluated in relation to market factors and consumer response
	3.3 Components of the marketing mix are adjusted in the light of test results and the evaluation of market response
	3.4 The adjusted marketing mix meets budgetary requirements
	3.5 The adjusted marketing mix continues to meet organisational, strategic and operational marketing objectives

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
Marketing mix may include:	• product or service variables
	• pricing variables
	• promotional variables
	• distribution variables
	• customer service variables

Range Statement

Product/service characteristics may include:	• compatibility with other products/services/equipment
	• brand
	• brand loyalty
	• degree of customisation
	• design
	• durability
	• ease of maintenance
	• features
	• flexibility
	• functional performance
	• innovativeness
	• reduction of risks to health and safety such as noise
	• packaging
	• pollution hazard reduction
	• quality
	• range of sizes, colour etc
	• robustness
	• styling
	• technical features
	• upgrading
	• volumes available
	• Occupational Health and Safety issues
Pricing variables may include:	• cost of ownership
	• credit terms
	• discount percentages
	• discount structure
	• financial deals
	• leasing arrangements
	• price point chosen
	• psychological elements
	• residual value
	• sales (end of season etc)
	• special offers
	• stage payments

Range Statement

Promotional methods may include:	• segmentation
	• personal promotion such as face-to-face selling
	• impersonal promotion such as:
	• advertising
	• sales promotion
Marketing may include:	• marketing of goods
	• services marketing
	• ideas marketing
	• public sector marketing
	• direct marketing
	• telemarketing
	• business-to-business marketing
Occupational Health and Safety considerations may include:	• health and safety of employees and public during promotional events
Distribution channels may include:	• e-business
	• self-service
	• wholesale
	• retail
	• distributor
	• delivery service
	• mail order
	• telesales
	• dealer
	• re-seller
	• franchisee
Level of customer service may include:	• no customer service
	• sales assistance for problems/queries only
	• one-on-one personal service
	• after sales service
	• call centre support
	• electronic client service

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria • A marketing mix decision that is substantiated and supported by evidence
Underpinning Knowledge* * At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • Principles of customer service • Organisation's products and services • Elements of marketing mix • Product • Price • Promotion • Place • Measures of significance • Consumer / buyer behaviour • Legal, ethical and environmental issues including Occupational Health and Safety
Underpinning Skills	• Literacy skills to identify market information, to write in a range of styles for different audiences and to interpret requirements • Communication skills including questioning, clarifying, reporting • Numeracy skills for analysis and significance testing • Evaluation skills • Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Evidence Guide

Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 2	Level 2	Level 3	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to provide input to the evaluation process
- **Communicating ideas and information** – to establish optimum marketing mix
- **Planning and organising activities** – to isolate marketing components for testing
- **Working with teams and others** – to monitor the implementation of the marketing mix
- **Using mathematical ideas and techniques** – to establish the significance of each component of the marketing mix
- **Solving problems** – to identify the inter-relationships of marketing components
- **Using technology** – to model marketing mix if required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG503A   Develop a marketing communications plan

Unit Descriptor   This unit covers preparation and development of an integrated marketing communications plan to enable the effective and efficient promotion of products and services to specific markets.

This unit is related to BSBMKG401A Profile the market.

Competency Field   Business Development

Element	Performance Criteria
1. Develop marketing communication objectives	1.1 The target market is identified and available media are reviewed in accordance with organisational requirements
	1.2 Criteria to use in an integrated marketing communications analysis are identified
	1.3 Forms of promotions that are best suited to the product/service/idea are reviewed and selected
	1.4 Marketing communication objectives are determined and a draft promotional brief is written in accordance with organisational requirements
	1.5 Promotional appeals and messages are developed to meet the requirements of the promotional brief
2. Determine the marketing communications mix	2.1 Marketing communications models are evaluated and a model of communications is identified to meet organisational requirements
	2.2 The relationship between the market mix and the promotions mix are explored
	2.3 The likely elements of primary and secondary promotions are determined in accordance with organisational requirements
	2.4 A marketing communications mix is selected that best suits the target market and meets marketing objectives
3. Set a promotional budget	3.1 General economic and business environmental factors are evaluated in terms of their effect on the *promotional budget* allocation.
	3.2 A marketing communications budget is allocated in accordance with the overall marketing budget
	3.3 Marketing communications implementation and control procedures are established in accordance with organisational requirements

Element	Performance Criteria
4. Prepare an integrated marketing communications plan	4.1 The elements of an *integrated marketing communications* plan are determined in accordance with organisational requirements
	4.2 Direct and indirect forms of marketing communications are evaluated in relation to marketing communications objectives
	4.3 Primary and secondary forms of marketing communications are identified and evaluated
	4.4 Institutional, product, service and idea promotions are evaluated for inclusion in the marketing communications plan
	4.5 The objectives of the marketing communications plan are developed and evaluated for effectiveness against the forms that are possible and for cost-effectiveness
	4.6 The marketing communications plan is prepared in accordance with the overall marketing plan and meets organisational requirements

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
Criteria to use in an integrated marketing communications analysis may include:	• effect on intermediaries
	• pre and post awareness research
	• data obtained from the marketing information systems
	• sales and profitability
	• reach and frequency data such as TARPS

Range Statement

Characteristics of marketing communications objectives may include:	• consumer needs
	• benefits desired
	• product/service usage
	• attitude
	• demographics
	• lifestyle
	• social and cultural factors
	• business characteristics
	• a comprehensive review of all major marketing activities of the organisation.
	• an orderly sequence of diagnostic steps covering the organisation's macro and micro-environmental factors
	• a media plan
	• AIDA model
	• Rossiter's model
Identification of promotional budgeting issues may include:	• interest rates and cost of capital
	• credit availability
	• forecast trends of size, growth, age, income, and regional distribution of population as they effect the organisation.
	• business and competitor characteristics
	• the influence of technology on the operations and services on the organisation's business costs.
	• the costs of various media
	• typical promotional budgeting methods such as "all you can afford", "competitive parity", "objective and task", and "% of sales" methods.

Range Statement

An integrated marketing communications approach may include:	• the process of developing an holistic plan for integrating the whole of the organisation's promotions in a cohesive manner
	• an understanding of marketing communications models
	• advertising
	• personal selling
	• promotions
	• publicity and public relations
	• electronic and print media
	• web marketing and e-commerce
	• impersonal, intra-personal and personal communications

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Definition of marketing communications and concept of marketing communications mix
	• Knowledge of communications models
Underpinning Knowledge* * At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Organisation's marketing plan
	• Organisation's products and services
	• Data collection and analysing techniques
	• Market mix
	• The elements of marketing planning
	• Basic financial records

Evidence Guide

Underpinning Skills	• Literacy skills to identify relevant information, to write reports and to interpret internal and external information
	• Communication including questioning, clarifying, reporting
	• Research skills
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 2	Level 2	Level 1	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to draft a promotional brief
- **Communicating ideas and information** – through development of a marketing communications plan
- **Planning and organising activities** – to gather data from a range of sources
- **Working with teams and others** – to determine organisational requirements
- **Using mathematical ideas and techniques** – to set the promotional budget
- **Solving problems** – to determine the marketing communications mix
- **Using technology** – to record and analyse data as required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG504A   Implement a marketing solution

Unit Descriptor   This unit covers briefing of personnel responsible for various aspects of the marketing plan and the coordination of marketing, promotional and sales activities to implement and evaluate a marketing solution.

This unit is related toBSBMKG405A Implement and monitor marketing activities and BSBMKG 603A Manage the marketing process. Consider co-assessment with BSBMKG505A Review marketing performance.

Competency Field   Business Development

Element

Performance Criteria

1.   Implement marketing strategies

1.1   *Stakeholders* who participated in the marketing planning process are briefed on their roles and responsibilities in implementation

1.2   Marketing and *non-marketing personnel* critical to the success of the marketing plan are identified and briefed on the objectives of the plan, performance measures, and their roles and responsibilities

1.3   *Marketing* strategies are prioritised and *resources* identified for their implementation in accordance with organisational requirements

1.4   Communication and team building strategies are implemented to ensure that personnel responsible for each element of the marketing mix work together to meet the organisation's marketing objectives

1.5   Strategies for monitoring marketing activities and analysing marketing performance are implemented in accordance with the marketing plan

2.   Monitor marketing strategies

2.1   Promotional activity is monitored against communication objectives in the marketing plan

2.2   Product, pricing and distribution decisions are monitored against organisational policy and the objectives of the marketing plan

2.3   Marketing results are monitored against targets in the marketing plan

2.4   Marketing revenue and costs are monitored against budget, and variations analysed and recorded

2.5   Marketing reports are prepared and presented that indicate ongoing progress towards marketing objectives

Element	Performance Criteria
3. Evaluate and improve marketing performance	3.1 Marketing performance is assessed against objectives, and opportunities for improvement are identified through discussion with personnel responsible for each element of the *marketing mix*
	3.2 Marketing performance evaluations and recommendations for improvement are documented in accordance with organisational requirements

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
Key stakeholders may include:	• owner/s
	• board of directors
	• managers
	• supervisors
	• finance staff
	• IT staff
	• production staff
	• human resource staff
	• marketing personnel
Non-marketing personnel may include:	• sales manager
	• sales team
	• advertising personnel
	• public relations personnel
	• managers
	• supervisors
	• staff

Range Statement

Marketing may include:	• marketing of goods
	• services marketing
	• ideas marketing
	• public sector marketing
	• direct marketing
	• telemarketing
	• business-to-business marketing
Resources may include:	• human
	• financial
	• physical
	• technical
	• IT
Marketing mix may include:	• product or service variables such as:
	• technical features
	• design
	• quality
	• range
	• safety features
	• pricing
	• promotion
	• distribution
	• level of service
Occupational Health and Safety considerations may include:	• health and safety of employees and public during marketing events
	• occupational violence

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Briefing notes, organisational communication and team building strategy, monitoring and evaluation report/s

Evidence Guide

Underpinning Knowledge*
- At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Product and service standards and best practice models
- Marketing objectives
- Marketing plans
- Concept of marketing mix
- Marketing performance measures
- Communication strategies
- Team building strategies
- Occupational Health and Safety

Underpinning Skills

- Literacy skills to identify market information, to write in a range of styles for different audiences and to interpret legal requirements
- Communication skills including questioning, clarifying, reporting
- Numeracy skills for analysis of marketing performance and revenue and cost analysis
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 3	Level 2	Level 3	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

• **Collecting, analysing and organising information** – to monitor marketing performance

• **Communicating ideas and information** – to brief personnel

• **Planning and organising activities** – to evaluate marketing strategies

• **Working with teams and others** – to implement marketing strategies

• **Using mathematical ideas and techniques** – to analyse marketing performance

• **Solving problems** – to recommend action in response to changed market conditions

• **Using technology** – for data analysis, if necessary

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG505A   Review marketing performance

Unit Descriptor   This unit covers review of marketing performance through analysis of customer requirements, existing features of products/services, and market demand to improve performance.

Consider co-assessment with BSBMKG504A Implement a marketing solution.

Competency Field   Business Development

Element	Performance Criteria
1. Review customer requirements	1.1 Customer requirements and preferences are confirmed through formal or informal *marketing research*
	1.2 The *market profile* describing the characteristics of the customer base is reviewed and confirmed as up-to-date
	1.3 Customer reactions, satisfaction and feedback are analysed and trends identified
2. Confirm market demand	2.1 The need for *products or services* is researched and documented in accordance with organisational requirements
	2.2 The target market and market segment are evaluated in line with customer characteristics
3. Review product/ service features	3.1 The nature and volume of products/services to be provided is assessed against customer demand
	3.2 The contribution of each product/service to the business is determined
	3.3 *Pricing variables, channels of distribution* and *level of customer service* are evaluated for their contribution to financial returns

Element	Performance Criteria
4. Monitor and improve marketing performance	4.1 Performance is monitored progressively against the objectives of the business plan and *improvements* identified through consultation with staff and customers
	4.2 Revenue and costs are monitored against budget, variations analysed and corrective action taken
	4.3 Changing customer requirements are monitored and changes made to business practices to maintain the relevance and viability of the business
	4.4 Changes in the market are analysed and their impact on business practice identified and responded to
	4.5 Proposed changes and revised targets are communicated to staff to facilitate their implementation

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Marketing research may include:	• self generated • commissioned • draw on published material • Sources of market information include: • potential customers • suppliers • competitors • the industry • the community
Market profile may include:	• demographic data such as size • characteristics of the primary customers (age group,

Range Statement

	education, experience, background, disposable income or lifestyle)
	• expectations regarding quality, presentation and support services

Products or services may include:	• goods or services or a combination of both
	• production of goods
	• delivery of services
	• import and/or distribution of goods and services
	• management of other businesses
	• a single product/service line
	• a few similar versions of one product/service
	• a number of products/services

Competitor analysis may include:	• number
	• size
	• location
	• range of quality, price and other features on which they compete
	• recent growth of competition
	• possible barriers to entry to the market

Pricing variables may include:	• price point chosen
	• cost plus margin
	• relative to competitors
	• demand orientation
	• credit terms
	• discount structure
	• discount percentages
	• leasing arrangements
	• sales (end of season etc)
	• special offers
	• financial deals
	• stage payments
	• cost of ownership
	• residual value
	• psychological elements

Channels of distribution may include:	• e-business
	• self-service

Range Statement

- wholesale
- retail
- distributor
- delivery service
- mail order
- telesales
- dealer
- re-seller
- franchisee

Level of customer service may include:

- self-help - no customer service
- sales assistance for problems/queries only
- one-on-one personal service
- after sales service
- call centre support
- electronic customer service

Business improvements may include:

- greater penetration of existing markets with existing products
- development of new products for existing markets
- development of new markets for existing products
- development of new products for new markets
- best practice management approaches
- property plan reviews
- development of mechanisms for reaching new markets or servicing existing markets (eg e-commerce)

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence

- Integrated demonstration of all elements of competency and their performance criteria
- Outcomes of review on product mix, pricing, distribution and service
- Rationale for choice of improvement/s to be pursued

Evidence Guide

Underpinning Knowledge*

*   At this level the learner must demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas.

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Organisation's business structure, products and services
- Business plans and objectives
- Performance measures
- Communication strategies

Underpinning Skills

- Literacy skills to research information, to write in a range of styles for different audiences and to interpret market data
- Communication skills including questioning, clarifying, reporting, relating to different audiences
- Numeracy skills for data analysis
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 3	Level 2	Level 2	Level 2	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to establish customer requirements
- **Communicating ideas and information** – to facilitate implementation of changes
- **Planning and organising activities** – to establish market demand
- **Working with teams and others** – to improve business performance
- **Using mathematical ideas and techniques** – to analyse market data
- **Solving problems** – to determine optimal mix of products and services
- **Using technology** – to store and analyse customer profile information

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG506A   Plan market research

Unit Descriptor

This unit specifies the outcomes required to plan market research by identifying market research needs, defining market research objectives and data gathering approaches, and developing a market research plan.

Competency Field   *Business Development*

Domain   *Marketing*

Application of the Competency

This unit covers market research planning at a managerial level of a non-market research organisation. While it may be undertaken as part of a broader role, a good general knowledge of market research principles and practices is required, as is a detailed understanding of the organisation's operations and objectives and their application to market research.

Element	**Performance Criteria**
Elements define the critical outcomes of a unit of competency.	The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Italicised terms are elaborated in the Range Statement.
7. Identify market research needs	1.1 Role of market research in enterprise operations is communicated to *relevant personnel*
	1.2 *Contribution of market research* to enterprise activity is identified
	1.3 *Enterprise planning and performance documentation* is analysed to determine *research needs*
	1.4 Relevant personnel are consulted to determine research needs
	1.5 Statement of market research needs is developed
8. Define market research objectives	2.1 Research objectives are drafted
	2.2 Preliminary *project scoping* is undertaken
	2.3 Draft research objectives are consulted with relevant personnel to ensure they result in relevant and useful information being gathered
	2.4 Draft objectives are reviewed and objectives finalised in light of scoping parameters
9. Define data gathering approaches	3.1 *Types of data* required to inform objectives are identified
	3.2 Combinations of types of data to best inform objectives are determined

	3.3	Suitable *data gathering methods* are identified and evaluated
	3.4	Data sources are identified
	3.5	Required data is quantified
	3.6	Suitable *data processing methods* are identified and evaluated
	3.7	*Decisions* are made in relation to data types, combinations, gathering methods, sources, quantities and processing methods
10. Develop market research plan	4.1	Resources required for market research projects are estimated
	4.2	Timelines for market research projects are estimated
	4.3	*Feasibility of market research projects* is determined
	4.4	Market research plan is prepared for approval
	4.5	Approval to implement plan is obtained from the appropriate personnel as required

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include**:**	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
Relevant personnel may include:	• enterprise owners, managers and supervisors
	• clients, suppliers and customers
	• other personnel who will approve, or benefit from, market research
Contribution of market research to enterprise activity may include:	• best practice
	• information about competitors/clients/stakeholders
	• information to enable predictions for:
	– policy making
	– strategic planning
	– marketing
	– service development and delivery

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

Research needs may include:	• research on consumers:
	   – identifying existing, potential or lapsed consumers
	   – developing detailed consumer profiles
	   – identifying changes in attitudes and behaviour patterns
	• research on products and services:
	   – measuring attitudes towards existing products or services
	   – identifying potential new products or services or ones which may be at the end of their life cycle
	   – evaluating competitors' products
	   – evaluating consumer attitudes towards presentation and packaging
	• research on pricing:
	   – identifying attitudes towards prices
	   – identifying costs
	   – testing alternative pricing strategies
	• research on place:
	   – identifying attitudes towards location
	   – identifying demand for products or services at other locations
	   – identifying cooperative opportunities for distribution of information or services
	• research on promotion:
	   – testing and comparing different media options
	   – testing alternative messages
	   – measuring advertising and promotion effectiveness
	• research on competition:
	   – measuring awareness
	   – identifying key competitors and their strengths
	   – identifying frequency of use of competitors' products and services
	   – comparing consumer attitudes to an organisation's services and those of competitors

Project scoping may address:	• time required and available • human, financial and physical resources required and available • possible sample size and nature of sample • possible research locations • possible research methodologies • need for external market research assistance
Types of data may include:	• qualitative data • formal or informal comments and other feedback from client, customers, staff and others • quantitative data • sales figures • industry planning information • government statistics
Data gathering methods may include:	• literature searches • focus groups • case study investigation • one-on-one interviews in person or by telephone • 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 • personal observation of performance • mail surveys
Data processing methods may include:	• manual or personal methods • data processing service experts • packaged analysis routines or programs • specialist software packages
Decisions about data types, combinations, gathering methods, sources and quantities may include:	• choices that will best satisfy the research objectives • choices consistent with organisational policies and procedures • choices achievable with available resources, and costs and benefits of choices
Feasibility of market research projects will include:	• ultimate usefulness of the research • feasibility of implementing the recommendations • whether similarly-valid results can be obtained by other means

- quality and credibility of the methodology

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this standard must be able to provide evidence that they can identify the research needs of their organisation and develop a research plan capable of implementation, to meet those needs.

Specific Evidence Requirements

Required knowledge and understanding include:	• market research principles and practices, including:
	  – the role of research in enterprise development
	  – the roles and uses of qualitative and quantitative research
	  – the development and use of hypotheses
	  – the design of samples
	  – the use of survey instruments
	  – project design to meet given budgets and other resource constraints
	  – data processing methods and data analysis techniques
	• project planning principles and practices including for:
	  – needs analyses
	  – consultation and stakeholder involvement
	  – scoping practices
	  – development of timelines, budgets and other implementation plans
	  – gaining of approvals

Required skills and attributes include:	• ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities • ability to identify organisational needs through basic research and consultation • ability to identify options for action and make recommendations about options • ability to develop complex plans including timelines, budgets and options

	• ability to negotiate approval for proposals
Key competencies or generic skills relevant to this unit	The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit: Level (1) represents the competence to undertake tasks effectively Level (2) represents the competence to manage tasks Level (3) represents the competence to use concepts for evaluating and reshaping tasks The bulleted points provide examples of how the key competencies can be applied for this unit.
Communicating ideas and information (3)	• communicating benefits of research to key stakeholders
Collecting, analysing and organising information (3)	• analysing enterprise documentation to determine research needs • scoping the research project • identifying options for each element of the research plan
Planning and organising activities (3)	• developing comprehensive market research plan
Working in a team (2)	• consulting with key personnel about research needs and the suitability of research plans in meeting needs • working with other researchers as required to develop plans
Using mathematical ideas and techniques (2)	• understanding and applying data analysis techniques
Solving problems (2)	• developing solutions (that will yield valid data) to inadequate budgets, inaccessible respondents or samples, time shortages and other problems
Using technology (1)	• using computer software to develop and present plans
Innovation skills (2)	• developing innovative ways to collect data • developing plans that yield maximum useful data and information for minimum cost
Products that could be used as evidence include:	• market research plan as approved, and any schedules or implementation detail • records of consultations, correspondence and internal analyses documenting the plan development process • testimonials from third parties involved in process (including those commissioning the research)

Processes that could be used as evidence include:	• how research needs were identified
	• how the project scope was determined
	• how options for key elements of the plan were identified
	• how cost-effectively the plan was considered to meet organisational research needs
Resource implications for assessment include:	• all project documentation developed as part of planning market research
	• relevant computer hardware and software
Validity and sufficiency of evidence requires:	• that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
	• that at least three examples of market research plans being developed are provided, covering the plan components listed in the performance criteria in this unit
	• that examples can be either simulated projects or actual activities developed and implemented
Integrated competency assessment means:	• that this unit can be assessed alone or as part of an integrated assessment activity involving other relevant units. The following unit is suggested:
	– BSBMKG607A Manage market research

BSBMKG601A   Develop marketing strategies

Unit Descriptor   This unit covers scoping marketing opportunities and the development of marketing strategies.

Competency Field   Business Development

Element	Performance Criteria
1. Scope marketing opportunities	1.1 Marketing opportunities are identified and analysed in terms of their viability and likely contribution to the business
	1.2 An assessment of *external factors*, costs, benefits, risks and opportunities is used to determine the scope of each marketing opportunity
	1.3 Opportunities are analysed in terms of their likely fit with the organisation's goals and capabilities
	1.4 Each opportunity is evaluated to determine its likely impact on current business and customer base
2. Develop marketing strategies	2.1 The characteristics of the business, its existing key products or services, *marketing performance* and any new marketing opportunities are analysed to determine a focus for marketing activities
	2.2 Characteristics of the customer base and *target market*/s are evaluated as a basis for marketing strategies
	2.3 Marketing objectives and strategies are determined in consultation with *key stakeholders* and are compatible with the direction, purpose and values of the business
	2.4 Marketing strategies address the aim and targets of the organisation's business plan
	2.5 Marketing strategies meet *legal and ethical requirements*

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Marketing opportunities may include:	• new businesses • takeovers • potential for greater penetration of existing markets with existing products or services • new products or services for existing markets • new products or services for new markets • extending, expanding or otherwise changing an existing business • joint ventures • cooperative ventures • strategic alliances • franchising • exports
External factors may include:	• legislation, eg Trade Practices Act • regulations • codes of practice • policies and guidelines
Marketing performance analysis may include	• product portfolio analysis • comparative analysis • competitive analysis • life cycle models • strengths-weaknesses-opportunities-threats (SWOT) analysis • value chain analysis

Range Statement

Marketing strategies may include:	• product design and packaging
	• pricing, presentation and display of products/services
	• promotion and advertising
	• product range and mix
	• distribution
	• achieving lower costs of production and distribution than competitors
	• pursuing cost leadership and/or product differentiation within a specialist market segment
	• creating a very different product line or service so that the business becomes a class leader in the industry
Information on the target audience may include:	• demographics
	• lifestyle
	• social and cultural factors
	• values or attitude factors
	• existing product usage
Key stakeholders may include:	• owner/s
	• board of directors
	• accountant
	• staff
	• managers
	• supervisors
	• marketing personnel
	• sub-contractors
	• strategic business partners
	• clients

Range Statement

Legal and ethical requirements may include:

- legislation, eg Trade Practices Act, Occupational Health and Safety legislation
- regulations
- codes of practice
- ethical principles
- policies and guidelines
- society's expectations
- cultural expectations and influences
- social responsibilities
- safety issues
- security and privacy issues
- environmental issues

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence

- Integrated demonstration of all elements of competency and their performance criteria
- Rationale for evaluation and scoping of opportunities and choice of marketing strategies

Underpinning Knowledge*

* At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Organisation's business structure, products and services
- Data collection and analysis techniques
- Organisation's marketing plan
- Business goals and objectives

Evidence Guide

Underpinning Skills	• Literacy skills to identify company and product/service information, to write in a range of styles for different audiences and to interpret legal requirements, company policies and procedures
	• Communication including questioning, clarifying, reporting
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 2	Level 2	Level 1	Level 2	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – on the characteristics of the business and the market

- **Communicating ideas and information** – to key stakeholders

- **Planning and organising activities** – to develop marketing strategies

- **Working with teams and others** – to develop strategies in consultation with key stakeholders

- **Using mathematical ideas and techniques** – to analyse and interpret information

- **Solving problems** – to select the strategies which best fit the organisation

- **Using technology** – for information storage and analysis, as required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG602A   Develop a marketing plan

Unit Descriptor	This unit covers the development and presentation (for approval) of a marketing plan including objectives, strategies, activities and resources over the areas of market research, product or service development, finance, advertising, sales, distribution, public relations and training.
	This unit is related to BSBMKG502A Establish and adjust the marketing mix.
Competency Field	Business Development

Element	Performance Criteria
1. Identify strategic direction	1.1 The organisation's mission, vision, purpose and values are confirmed through accessing up-to-date organisational materials and/or discussions with owner/s, director/s or senior management
	1.2 *Strategic* organisational *documents* are analysed to identify directions and targets
	1.3 A *situational analysis* is completed that identifies factors impacting on the direction and performance of the business
	1.4 *Legal and ethical requirements* for the organisation are identified
	1.5 The strategic direction of the organisation is documented and confirmed with owner/s, director/s or senior management and its impact on marketing activities identified
2. Review marketing performance	2.1 The effectiveness of previous marketing and positioning strategies is evaluated to identify lessons learned
	2.2 Current key products or services and major markets are analysed for strengths, weaknesses, opportunities and threats
	2.3 Previous marketing opportunities are evaluated and their profitability examined and documented
	2.4 Marketing performance is evaluated against previous objectives and targets to identify critical success factors and areas for improvement

Element	**Performance Criteria**
3. Formulate marketing objectives	3.1 Objectives are developed in consultation with *key stakeholders*, are attainable, measurable and identify the nature and extent of what is to be achieved
	3.2 Objectives are consistent with the forecast needs of the business and the market
	3.3 Objectives are compatible with the organisation's projected capabilities, resources and financial position
	3.4 Objectives are compatible with the organisation's direction and purpose and meet legal and ethical requirements
4. Devise marketing strategies	4.1 Options are identified that address agreed objectives, and their risks and returns are evaluated in the process of selection
	4.2 Strategies address strengths and opportunities and are within the organisation's projected capabilities and resources
	4.3 Where gaps exist between current capability and marketing objectives, strategies address ways of increasing resources and/or organisational expertise
	4.4 Marketing strategies are feasible and accompanied by supporting information that justifies their selection
	4.5 Strategies are compatible with the organisation's strategic direction
	4.6 A review strategy is included to address on-going review of organisational performance against marketing objectives
5. Plan marketing tactics	5.1 Tactics to implement each marketing strategy are detailed in terms of scheduling, costing, accountabilities and responsible person/s
	5.2 Coordination and monitoring mechanisms are identified for scheduled activities
	5.3 Tactics are achievable within the organisation's projected capabilities
	5.4 Tactics meet legal, ethical and budgetary requirements
	5.5 Tactics provide for on-going review of performance against objectives and budgets and for marketing targets to be adjusted if necessary

Element	Performance Criteria
6. Prepare and present a marketing plan	6.1 The plan meets organisational as well as marketing objectives and incorporates *marketing approaches*, and strategic *marketing mix*
	6.2 The plan contains a rationale for objectives and information that supports the choice of strategies and tactics
	6.3 The plan is presented for approval in the required format and timeframe
	6.4 The plan is adjusted in response to feedback from key stakeholders and disseminated for implementation within the required timeframe

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
Strategic documents may include:	• strategic plans
	• strategic marketing plans
	• annual reports
	• company policy
	• customer service charter
	• codes of practice
	• security and privacy policies
Situational analysis may include:	• productivity /profitability analysis
	• competitive analysis
	• environmental analysis
	• market measurements
	• market analysis
Legal and ethical requirements	• legislation, eg Trade Practices Act

Range Statement

may include:	• regulations
	• codes of practice
	• ethical principles
	• policies and guidelines
	• society's expectations
	• cultural expectations and influences
	• social responsibilities
	• health and safety of workplace personnel
	• security and privacy issues
	• environmental issues

Marketing performance evaluation may include:

- product portfolio analysis
- comparative analysis
- competitive analysis
- life cycle models
- strengths-weaknesses-opportunities-threats (SWOT) analysis
- value chain analysis

Marketing objectives are:

- quantitative statements in terms of:
  - profit
  - volume
  - value
  - market share
- usually stated by
  - product
  - segment
  - overall

Key stakeholders may include:

- owner/s
- board of directors
- managers
- supervisors
- finance staff
- marketing personnel
- human resource staff
- IT staff
- production staff

Marketing strategies:

- state how marketing objectives will be achieved

Range Statement

- may include:
    - status quo
    - intense growth
    - integrated growth
    - diversification
    - market penetration
    - product or market development
- may address:
    - product
    - price
    - promotion
    - distribution
    - demand
    - target market

Marketing approaches may include:

- mass marketing
- mass distribution
- differentiated target marketing
- product variety marketing
- e-business

Marketing mix may include:

- product or service variables such as:
    - technical features
    - design
    - quality
    - range
    - safety features
- pricing
- promotion
- distribution
- level of service

Occupational Health and Safety considerations may include:

- health and safety of employees and public during marketing events

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Preparation and presentation of a marketing plan that addresses the needs of the business and the market
Underpinning Knowledge* * At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Organisation's business structure, products and services
	• Strategic, operational and tactical plans
	• Legal and ethical requirements
	• Market performance evaluation methodologies
	• Marketing strategies and approaches
	• SWOT analysis
	• Scheduling and costing
	• Concept of marketing mix
	• OHS management (manage health and safety hazards and risks)
Underpinning Skills	• Literacy skills to identify market information, to write in a range of styles for different audiences and to interpret legal requirements
	• Communication skills including questioning, clarifying, reporting
	• Numeracy skills for data analysis
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
	• Planning and evaluation
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Evidence Guide

Consistency of Performance   In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Context/s of Assessment
- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 3	Level 3	Level 2	Level 3	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to review previous performance
- **Communicating ideas and information** – through the development and presentation of a marketing plan
- **Planning and organising activities** – to schedule tactics and activities to address strategies and objectives
- **Working with teams and others** – to gain stakeholder approval
- **Using mathematical ideas and techniques** – to schedule and cost activities
- **Solving problems** – to determine strategies that best fit the needs and goals of the organisation
- **Using technology** – for data analysis, scheduling and costing if required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG603A   Manage the marketing process

Unit Descriptor   This unit covers strategic management of the marketing process and the management of marketing personnel.

This unit is related to BSBMKG504A Implement a marketing solution. Consider co-assessment with BSBMKG604A Develop and manage direct marketing campaigns and BSBMKG606A Manage international marketing programs.

Competency Field   Business Development

Element	Performance Criteria
1. Formulate strategic marketing objectives	1.1 The organisation's strategic direction is confirmed and its impact on marketing activities identified
	1.2 *Marketing performance* is reviewed and key result areas of strategic significance identified
	1.3 A situational analysis is undertaken to identify future marketing opportunities
	1.4 The *legal, ethical and environmental constraints* of the market are identified and their effect on marketing objectives determined
	1.5 *Long term* strategic objectives and related key performance indicators are formulated by product or service, market segment and overall
	1.6 A *risk management strategy* is developed to manage contingencies and ensure marketing objectives are met in accordance with overall organisational requirements
2. Manage marketing performance	2.1 Marketing effort is managed to ensure it is directed towards areas of greatest potential for the organisation
	2.2 The integration of marketing, promotional and sales activities is managed in accordance with strategic marketing objectives
	2.3 Product, pricing and distribution policies are monitored in relation to market changes, the objectives of the marketing plan and organisational requirements
	2.4 Overall marketing progress is monitored against performance targets to ensure activity, quality, cost, and time requirements are met

Element	Performance Criteria
3. Manage marketing personnel	3.1 Strategic marketing objectives are communicated across the organisation in ways suited to the levels of knowledge, experience and any specific needs of personnel
	3.2 The roles, responsibilities and accountabilities of staff and contractors involved in all elements of the marketing effort are identified and agreed
	3.3 A communication strategy is developed to ensure that personnel responsible for each element of the *marketing mix* work together to meet the organisation's marketing objectives
	3.4 Mentoring and coaching is provided to support individuals/teams use resources to the required standard
	3.5 Performance gaps are identified and corrective action instigated promptly to safeguard marketing outcomes
4. Evaluate and improve strategic marketing performance	4.1 Marketing outcomes are analysed and strategic objectives reviewed and/or revised in response
	4.2 Successes and performance gaps are analysed as to cause and effect and used to improve strategic performance
	4.3 Over-performance against targets is analysed for trends, and new targets set
	4.4 Changes in market phenomena are analysed and their impact on strategic marketing objectives identified and documented
	4.5 Review of marketing performance against key performance indicators is documented in accordance with organisational requirements

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Range Statement

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Long term may be:	• three to five years
Risk management strategy may include:	• managing risks to health and safety of workplace personnel and public / visitors • risk identification • risk analysis • risk assessment and prioritisation • risk treatment • risk maintenance
Marketing mix may include:	• product or service variables such as: 　• technical features 　• design 　• quality 　• range 　• safety features • pricing • promotion • distribution • level of service

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria • Documented strategic marketing objectives, risk management strategy and evaluation report • Evidence of successful handling of performance gaps
Underpinning Knowledge*	• Relevant legislation from all levels of government

Evidence Guide

* At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.

that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination

- Organisation's product and services
- Strategic marketing
- Strategic marketing plans
- Strategic objectives
- Key performance indicators
- Inter-relationship of elements of the marketing mix
- Performance management
- Marketing performance measures
- Competitive analysis
- Risk management
- Communication strategies

Underpinning Skills

- Literacy skills to identify strategic information, to write in a range of styles for different audiences and to interpret market data
- Communication skills including questioning, clarifying, reporting, relating to different audiences
- Numeracy skills for data analysis
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement

- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package

- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment

- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

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Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 3	Level 2	Level 3	Level 2	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to formulate strategic objectives
- **Communicating ideas and information** – to gain commitment to strategic marketing objectives
- **Planning and organising activities** – to evaluate and improve outcomes
- **Working with teams and others** – to integrate marketing performance across the organisation
- **Using mathematical ideas and techniques** – to analyse performance data
- **Solving problems** – to identify and act on successes and performance gaps
- **Using technology** – for data analysis and report writing if necessary

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

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BSBMKG604A   Develop and manage direct marketing campaigns

Unit Descriptor

This unit covers development, production, implementation, management and evaluation of direct marketing campaigns.

Consider co-assessment with BSBMKG603A Manage the marketing process and BSBMKG606A Manage international marketing programs.

Competency Field   Business Development

Element	Performance Criteria
1. Develop direct marketing strategies	1.1 Customer acquisition strategies are developed that include objectives related to numbers of new customers, cost of recruiting, media options, and promotional activities within an overall budget
	1.2 Customer retention strategies are developed that relate to customer needs and wants, customer buying patterns, opportunities for up-selling or cross-selling and customer renewals/reactivation
	1.3 Customer loyalty strategies are developed that address relationship marketing objectives and contribute to long term partnerships
2. Develop a marketing plan for a direct marketing campaign	2.1 The marketing plan identifies the purpose of the campaign, and objectives that relate to relationship building, *processes*, *media options*, outcomes and criteria for reporting, analysis and evaluation
	2.2 The marketing plan includes production and campaign schedules that identify tasks, implementation sequence, timelines and responsibilities in accordance with the campaign brief
	2.3 The marketing plan includes implementation objectives and deadlines negotiated and agreed with suppliers
	2.4 The marketing plan identifies a strategy for assessing campaign viability prior to implementation and establishes a campaign budget in accordance with the requirements of the campaign brief

Element	**Performance Criteria**
3. Manage direct marketing campaign production processes	3.1 Production processes are scheduled and suppliers selected and engaged in accordance with the requirements of the marketing plan
	3.2 Production activities are monitored against scheduling and budgetary requirements and likely variations approved in accordance with organisational policy and procedures
	3.3 The outputs from the production process meet the requirements of the production schedule, campaign brief and the marketing plan
4. Direct campaign implementation	4.1 A campaign implementation strategy is negotiated that outlines implementation tasks and timelines and includes a contingency plan for dealing with omissions and errors
	4.2 Processes for customers to respond to the campaign and receive products or services are implemented and monitored in accordance with the campaign brief and *legal and ethical requirements*
5. Evaluate direct marketing campaign effectiveness	5.1 Campaign results are measured against marketing and budgetary performance criteria and forecasts, and the extent of success is documented in accordance with organisational requirements
	5.2 *Measurements and calculations* are performed on data relating to components and costs of the campaign, and the significance of the results interpreted and recorded in accordance with organisational requirements
	5.3 Pre-campaign assessments and predictions are compared with campaign results to determine their accuracy and recommendations are made to improve future forecasting
	5.4 A campaign evaluation report is prepared in accordance with organisational requirements

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Processes may include:	• use of databases • data mining • in depth examination of mail packages • phone technology • use of experiments • campaign testing
Media options may include:	• direct mail • newspapers • magazines • catalogues • coupons • television • radio • telephone • Internet • e-mail
Measurements and calculations may include:	• response rate • conversion rate • gross sales value • net sales value • cost per sale • cost per response • breakeven • allowable cost/s

Range Statement

- lifetime value (best customer)
- lifetime value (average customer)
- campaign value
- net campaign contribution
- return on investment

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Supporting arguments for interpretation of measurements and calculations
Underpinning Knowledge*	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
* At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.	• Organisation's products and services
	• Organisation's business and marketing plan
	• Legal and ethical requirements
	• Direct marketing campaign briefs
	• Media options
	• Campaign contingencies
	• Marketing planning
Underpinning Skills	• Literacy skills to interpret requirements from the campaign brief and establish contracts and report writing skills
	• Communication including questioning, clarifying, reporting
	• Numeracy skills for budgeting and scheduling
	• Project management skills for monitoring contracts
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Evidence Guide

Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 2	Level 2	Level 3	Level 1	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

• **Collecting, analysing and organising information** – to evaluate campaign effectiveness

• **Communicating ideas and information** – to negotiate with suppliers

• **Planning and organising activities** – to implement the campaign

• **Working with teams and others** – to manage the production process

• **Using mathematical ideas and techniques** – to negotiate prices and monitor budgets

• **Solving problems** – to deal with variations to the direct marketing campaign

• **Using technology** – to record data and carry out calculations if required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG605A   Evaluate international marketing opportunities

Unit Descriptor   This unit covers evaluating the international environment, identifying market factors and risks, and assessing the viability of international marketing opportunities.

This unit is related to BSBMKG501A Evaluate marketing opportunities. Consider co-assessment with BSBMKG606A Manage international marketing programs.

Competency Field   Business Development

Element	Performance Criteria
1. Review the global market environment	1.1 International trade patterns are assessed and their likely importance for the business identified
	1.2 Multinational business and e-commerce markets are researched and opportunities to enter, shape or influence the market are assessed in terms of likely contribution to the business
	1.3 International markets operating under free trade and/or protectionist arrangements are identified and the likely ease of entering and trading successfully estimated
	1.4 *International trade* policies and *agreements* are identified and their likely impact on international marketing opportunities estimated
2. Assess *international business and e-commerce market factors*	2.1 Economic and political factors affecting the international market are identified and analysed for their potential impact on international marketing opportunities
	2.2 *Social and cultural factors* affecting the international market are identified and analysed for their potential impact on international marketing opportunities
	2.3 International market trends and developments are investigated to identify market needs relative to the business
	2.4 New and emerging business and e-commerce markets are identified and opportunities to enter, shape or influence the markets are assessed in terms of their fit with business goals and direction and their likely contribution to the business

Element	**Performance Criteria**
3. Identify *risk factors* for international marketing opportunities	3.1 Political and financial stability and corruption risks for the potential market are analysed and rated as acceptable or not
	3.2 Legal and regulatory requirements and trade barriers for the potential market are analysed and rated as acceptable or not
	3.3 Risk factors are related to international business cycles in terms of *economic conditions*, and their impact is estimated for the potential market
4. Investigate *international business and e-commerce marketing opportunities*	4.1 Opportunities are identified and analysed in terms of their likely fit with the organisation's goals and capabilities
	4.2 Each opportunity is evaluated to determine its impact on current business and customer base
	4.3 An assessment of costs, benefits, risks and opportunities is used to determine the financial viability of each marketing opportunity
	4.4 Probable return on investment and potential competitors are determined
	4.5 Marketing opportunities are described and ranked in terms of their viability and likely contribution to the business

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments
	• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• relevant industry codes of practice
International trade agreements may include:	• GATT

Range Statement

International business and e-commerce market factors may include:	• trade relations with Australia
	• level of economic development
	• industrial structure
	• growth factor/s
	• investment rates
	• technology and telecommunications infrastructure
	• cost of funds
	• currency exchange rates
	• interest rates
	• trade restrictions
	• tariffs
	• distribution channels
	• political systems
	• social and cultural factors
	• incentives
	• government assistance
	• trade groupings
	• geographical groupings
	• cultural and political groupings
	• on-line customer groupings
	• virtual communities
	• customer service factors
Social and cultural factors may include:	• social values
	• family role and status
	• traditions
	• preferences
	• behaviours
	• language
	• customs
	• currency
	• political system
	• legal system

Range Statement

Risk factors may include:	• political stability
	• financial stability
	• legal and regulatory requirements
	• work factors
	• cultural factors
	• language factors
	• available technology
	• telecommunications infrastructure
	• resource capability and capacity
	• resource availability, sustainability and management
	• logistics
	• transportation systems
	• communication systems
	• trade barriers
	• corruption risks
	• legal risks in selling goods and services on-line to the international market
Economic conditions may include:	• prosperity
	• recession
	• depression
	• recovery
International marketing opportunities may include:	• exporting
	• licensing
	• agents
	• intermediaries
	• joint ventures
	• strategic alliances
	• direct investment
	• on-line business opportunities

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria
	• Supporting evidence for decisions about likely impact of factors, probable return on investment and market viability of international marketing opportunities
Underpinning Knowledge* * At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.	• Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
	• Organisation's products and services
	• Organisation's business and marketing plan
	• Research processes for international markets
	• Cross-cultural communication
	• International business protocols
	• E-Commerce
Underpinning Skills	• Literacy skills to identify and evaluate information, and to interpret cultural issues
	• Communication including questioning, clarifying and reporting
	• Research and evaluation skills
	• Computer technology skills
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Evidence Guide

Context/s of Assessment

- Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement

- Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package

- Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment

- Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

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Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 3	Level 3	Level 2	Level 3	Level 1	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to identify international market factors

- **Communicating ideas and information** – to rank marketing opportunities

- **Planning and organising activities** – to research multinational markets

- **Working with teams and others** – to gather information on the international business environment

- **Using mathematical ideas and techniques** – to analyse data and draw conclusions

- **Solving problems** – to assess the viability of international marketing opportunities

- **Using technology** – for investigating international marketing opportunities in an on-line environment

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

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BSBMKG606A Manage international marketing programs

Unit Descriptor   This unit covers strategic management of international marketing programs, including setting objectives, determining marketing approach and structuring the international marketing organisation.

Consider co-assessment with BSBMKG603A Manage the marketing process, BSBMKG604A Develop and manage direct marketing campaigns and BSBMKG605A Evaluate international marketing opportunities.

Competency Field   Business Development

Element	Performance Criteria
1. Formulate international marketing objectives	1.1 Viable international marketing opportunities are selected and objectives developed that are consistent with the organisations capabilities and resources
	1.2 International marketing objectives are identified that are consistent with the organisation's strategic direction, are measurable and identify the nature and extent of what is to be achieved in the international market
	1.3 Strategic objectives and related key performance indicators are formulated by product or service, country or *international grouping*, and overall
	1.4 A *risk management strategy* is developed to manage contingencies and ensure marketing objectives are met in accordance with overall organisational requirements
2. Determine international marketing approach	2.1 International marketing opportunities are researched and global or customised approaches are determined for product/service promotion
	2.2 Options for choice of *marketing approach*/es are evaluated
	2.3 A marketing approach is selected that meets marketing objectives, international market conditions and consumer preferences
3. Determine *operational structures*	3.1 Business culture and consumer preferences are evaluated and compatible marketing structures identified
	3.2 Options for operational marketing structure are identified and ranked in terms of their *strengths and weaknesses* in servicing international markets
	3.3 An operational structure is chosen that best fits the international market and the product/service

Element	**Performance Criteria**
4. Manage international marketing performance	4.1 International marketing objectives are communicated across the organisation in ways suited to the culture, customs, levels of knowledge, experience and any specific needs of personnel
	4.2 The roles, responsibilities and accountabilities of staff and contractors involved in all elements of the marketing effort are identified and agreed
	4.3 A communication strategy is developed to ensure that personnel responsible for each element of the *marketing mix* work together to meet the organisation's marketing objectives
	4.4 Marketing effort is managed to ensure it is directed towards areas of greatest potential for the organisation
	4.5 The integration of marketing, promotional and any sales activities is managed in accordance with international marketing objectives
5. Evaluate and improve international marketing performance	5.1 Product, pricing and distribution policies are monitored in relation to market changes, the objectives of the marketing plan and organisational requirements
	5.2 Overall marketing progress is monitored against performance targets to ensure activity, quality, cost, and time requirements are met
	5.3 Marketing outcomes are analysed and marketing objectives reviewed and/or revised in response
	5.4 Successes and performance gaps are analysed as to cause and effect and used to improve international marketing performance
	5.5 Changes in market phenomena are analysed and their potential impact on international marketing objectives identified and documented
	5.6 Review of marketing performance against key performance indicators is documented in accordance with organisational requirements

Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
International grouping may include:	• trade groupings • geographical groupings • cultural groupings • political groupings • on-line virtual communities
Risk management strategy may include:	• risk identification • risk analysis • risk assessment and prioritisation • risk treatment • risk maintenance
Risk factors may include:	• political stability • financial stability • legal and regulatory requirements • work factors • cultural factors • language factors • available technology • telecommunications infrastructure • resource capability and capacity • resource availability, sustainability and management • logistics • transportation systems • communication systems • trade barriers • corruption risks

Range Statement

Marketing approach may include:	• global
	• customised
	• on-line
	• product or promotion standardisation
	• product or promotion adaptation
	• segmentation by criteria which are :
	• geographic
	• demographic
	• psychographic
	• behaviouristic
	• end use
	• operational
Operational structures may include:	• on-line business operation
	• overseas branch
	• export operation
	• licensing
	• subsidiary company
	• multi-national organisation
	• joint venture
	• strategic alliance
	• global organisation
Strengths and weaknesses of marketing structures may include:	• accessibility
	• research capability
	• market capability
	• manufacturing capability
	• financial factors
	• distribution channels
	• resource commitment
	• risk control
	• potential profit factors

Range Statement

Marketing mix may include:
- product or service variables such as:
  - technical features
  - design
  - quality
  - range
  - safety features
- pricing
- promotion
- distribution
- level of service

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence
- Integrated demonstration of all elements of competency and their performance criteria
- Supporting rationale for choice of marketing objectives, approach and operational structure

Underpinning Knowledge*

*   At this level the learner must demonstrate understanding of specialised knowledge with depth in some areas.

- Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Organisation's products and services
- Strategic marketing and marketing objectives
- Organisation's marketing plan
- Strategic marketing plans
- Key performance indicators
- Inter-relationship of elements of the marketing mix
- Performance management
- Marketing performance measures
- Risk management
- Communication strategies
- e-Commerce
- Cross-cultural communication

Evidence Guide

Underpinning Skills	• Literacy skills to identify strategic information, to write in a range of styles for different audiences and to interpret market data
	• Communication skills including questioning, clarifying, reporting, relating to different audiences
	• Computer technology skills
	• Numeracy skills for data analysis
	• Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Resource Implications	The learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Consistency of Performance	In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations
Context/s of Assessment	• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
	• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
	• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
	• Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

NB: *These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 3	Level 2	Level 3	Level 1	Level 3	Level 1

Three levels of performance denote level of competency required to perform a task.

1. Perform   2. Administer   3. Design

- **Collecting, analysing and organising information** – to determine marketing objectives
- **Communicating ideas and information** – to staff and contractors on their roles and responsibilities
- **Planning and organising activities** – to ensure that personnel responsible for each element of the marketing mix work together to meet the organisation's marketing objectives
- **Working with teams and others** – to improve international marketing performance
- **Using mathematical ideas and techniques** – for information analysis
- **Solving problems** – to determine the best fit from a range of options
- **Using technology** – for recording and analysing information if required

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

BSBMKG607A   Manage market research

Unit Descriptor   This unit specifies the outcomes required to manage market research projects for the organisation. This involves preparing market research plans for implementation, engaging external consultants, managing market research activity, and evaluating research processes and findings.

Competency Field   *Business Development*

Domain   *Marketing*

Application of the Competency   This unit covers the management of market research in a non-market research organisation. While it may be undertaken as part of a broader role of the person, a good general knowledge of market research principles and practices is required, as is a detailed understanding of the organisation's operations and objectives and their application to market research.

Element	Performance Criteria
Elements define the critical outcomes of a unit of competency.	The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Italicised terms are elaborated in the Range Statement.
11. 1. Prepare market research plans for implementation	1.1 Research *policies and procedures* are determined
	1.2 Project plans are reviewed and work plans detailed to point of *finalisation*
	1.3 *Processes to obtain required resources* to implement work plans are executed
12. 2. Engage external consultants	2.1 Requirement for external consultants is identified from project plans
	2.2 Required services are specified
	2.3 Potential consultants are identified, evaluated and selected
13. 3. Manage market research activity	3.1 Work plan duties and responsibilities are communicated to relevant personnel
	3.2 *Monitoring of work plan activity* is undertaken to ensure adherence to work plan and research policy and procedures
	3.3 External consultants are managed to ensure performance is in line with requirements
14. 4. Evaluate research processes and findings	4.1 Validity of the information and data obtained is confirmed
	4.2 Relevance and usefulness of findings are reviewed against research objectives

4.3   Performance of project against elements of project plan is assessed

4.4   Stakeholder satisfaction with research process and findings is measured

4.5   Reports are prepared on future improvements to research process

4.6   Revised policy and practices are implemented in accordance with organisational requirements

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include**:**	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
Research policy and procedures may cover and include:	• OHS procedures, practices, policies and precautions • relevant national, state and local legislation • performance indicators, targets and specifications • procedures to accurately document findings and ensure accuracy is being attained • privacy and confidentiality guidelines and ethical considerations • measures taken to ensure quality of data and to set validity and reliability requirements • opportunities for involvement of enterprise staff and other stakeholders
Finalisation of work plans may involve:	• additional detail on any matter of operations that was not required for approved plans but is required for action by researchers or other relevant personnel
Processes to obtain required resources may involve:	• written and oral submissions for resources • organisational procedures and requirements for obtaining resources • liaison and negotiation with key stakeholders
Monitoring of work plan activity may include:	• meetings, briefings, direct supervision • opportunities for feedback, support, advice and debriefing for research workers

- documentation about what is required of researchers, by when and with what resources
- procedures for regular reviews of progress
- amendment to the work plan if necessary

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this standard must be able to provide evidence that they have managed substantial market research projects involving several researchers and external consultants; and managed market research for their organisation (including the development of organisational policies and procedures).

Specific Evidence Requirements

Required knowledge and understanding include:	• market research principles and practices, including: – the role of research in enterprise development – qualitative and quantitative research – the development and use of hypotheses – the design of samples – the use of survey instruments – project design to meet given budgets and other resource constraints – data processing methods and data analysis techniques • project management principles and practices including for: – consultation and stakeholder involvement – development of policies and procedures – monitoring of timelines, budgets and other implementation plans – methods of action to ensure performance – organisational procedures for engagement of consultants
Required skills and attributes include:	• ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities • ability to manage others • ability to evaluate, engage and manage external consultants • ability to monitor market research work plan

- ability to design and conduct evaluation process for market research activity
- ability to liaise with stakeholders

Key competencies or generic skills relevant to this unit	The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit: Level (1) represents the competence to undertake tasks effectively Level (2) represents the competence to manage tasks Level (3) represents the competence to use concepts for evaluating and reshaping tasks The bulleted points provide examples of how the key competencies can be applied for this unit.
Communicating ideas and information (3)	• working with others to motivate and direct their work • interpreting and communicating complex elements of the work plan
Collecting, analysing and organising information (2)	• analysing project plans, policies and procedures to manage market research within the organisation
Planning and organising activities (2)	• planning and organising market research activity within the organisation including reviewing and evaluating activity
Working in a team (3)	• working with internal and external stakeholders to manage market research
Using mathematical ideas and techniques (1)	• engaging in discussions and providing advice about statistical techniques used for data analysis
Solving problems (3)	• providing guidance at an advanced level to researchers to solve problems arising in the conduct of the research
Using technology (1)	• using basic functions of software
Innovation skills (3)	• providing guidance of an advanced level to researchers to apply innovation in the design of survey tools and the conduct of research, to yield maximum data for minimum cost
Products that could be used as evidence include:	• work plans developed from approved market research plans • documentation to select, engage, brief and manage external consultants • testimonials from researchers and external consultants about the competence of the management

	•	documentation on the evaluation of the research process and findings
Processes that could be used as evidence include:	•	how approved project plans were finalised into work plans
	•	how external consultants were identified, briefed, selected and managed
	•	how researchers were managed
	•	how stakeholders were engaged in the research process
Resource implications for assessment include:	•	all key documentation relating to the market research projects being managed
Validity and sufficiency of evidence requires:	•	that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
	•	that at least two examples of market research projects being managed are provided, with at least one involving the engagement of consultants. Examples should be actual marketing activities
Integrated competency assessment means:	•	that this unit can be assessed alone or as part of an integrated assessment activity involving other relevant units. The following unit is suggested:
		– BSBMKG506A Plan market research