

Competency Standard

UNIT TITLE: COORDINATE PRODUCTION OF BROCHURES AND MARKETING MATERIALS		NOMINAL HOURS: 70
UNIT NUMBER: D2.TCS.CL5.06		
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to manage the production of brochures and marketing materials.		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1: Identify the context for brochures and marketing materials</p> <p>1.1 Determine the <i>factors that apply</i> to the production of <i>brochures and marketing materials</i></p> <p>1.2 <i>Plan the production</i> of items</p> <p>1.3 <i>Develop action plans</i> for individual brochures and marketing materials</p> <p>Element 2: Manage inclusions for brochures and marketing materials</p> <p>2.1 Determine the <i>target(s) for the items</i></p> <p>2.2 Determine the <i>content for the items</i></p> <p>2.3 Determine <i>format and layout for the items</i></p> <p>2.4 Determine <i>language for the items</i></p> <p>2.5 Determine the <i>prices to be stated in the items</i></p> <p>2.6 Determine the <i>copy for the items</i></p>	<p>Unit Variables</p> <p>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment.</p> <p>This unit applies to organisations that are involved in producing brochures and marketing materials within the labour divisions of the hotel and travel industries and may include:</p> <ol style="list-style-type: none"> 1. Travel Agencies 2. Tour Operation <p><i>Factors that apply</i> may be related to:</p> <ul style="list-style-type: none"> • Objectives • Target market(s) • Analysis of the brochures and marketing materials being used by competitors • Required or preferred style and size of materials including consideration of demands placed on brochures and marketing materials by others in the marketing and distribution chain • Time parameters including seasonal considerations, and the relationship between product release and the need to promote that product 	

<p>Element 3: Administer activities relating to the production of draft items</p> <p>3.1 <i>Provide resources</i> for the production of draft items</p> <p>3.2 <i>Proof read material</i></p> <p>3.3 <i>Circulate items for comment</i> and feedback</p> <p>3.4 Revise brochures and marketing materials</p> <p>Element 4: Obtain quotations for production of brochures and marketing materials</p> <p>4.1 <i>Meet and discuss the proposal with service providers</i></p> <p>4.2 Provide <i>detailed specifications</i> as the basis for obtaining a quotation for work to be done</p> <p>4.3 <i>Obtain quotations</i> from a range of service providers</p> <p>4.4 <i>Evaluate quotations</i> received to make a purchasing decision</p> <p>4.5 Select the service provider(s) to supply services and lodge official order</p> <p>Element 5: Administer activities relating to the production of final items</p> <p>5.1 <i>Monitor production activities</i> undertaken by selected service providers</p> <p>5.2 Ensure payment to service providers, as agreed</p>	<ul style="list-style-type: none"> • Budget including consideration of joint venture marketing initiatives • In-house production capabilities and their availability to produce materials that align with designated timeframes • Internal and external distribution considerations including cost of distribution, required quantities, language(s) to be used, target market(s) and intermediaries in the distribution chain • Availability of information that needs to be included in the marketing materials, including relevance, currency and copyright clearance • Organisational image including consideration of the need to either maintain or extend the existing image, or the need to alter the image • Legal restrictions and restrictions that may apply including need to ensure accuracy, comprehensiveness and truthfulness in content, detail, descriptions, representations and statistics. <p><i>Brochures and marketing materials</i> may include:</p> <ul style="list-style-type: none"> • Product and service brochures • Destination guides • Promotional flyers and leaflets • Conference programs and registration/advertorial forms • Event prospectus • Display material • Information kits • Product support materials • Advertising materials • Direct mail items • Invitations • Merchandising goods.
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<p>5.3 Identify and use alternative service providers where production timelines are not being met</p> <p>5.4 <i>Proof read material that is produced as final items</i> for approval prior to full production</p> <p>5.5 <i>Authorise production</i> of final items</p> <p>5.6 <i>Check items supplied by service providers as final items</i></p>	<p><i>Plan the production</i> will include:</p> <ul style="list-style-type: none"> • Identifying the type, nature and volume of items to be produced • Integrating materials with organisational plans, goals and objectives • Developing expected outcomes for the brochures and marketing materials • Identifying methods to evaluate the impact of brochures and marketing materials • Involving relevant others in the process • Clarifying resources available to achieve the expected outcomes • Identifying issues that may impact on developing and producing materials. <p><i>Develop action plans</i> may be related to:</p> <ul style="list-style-type: none"> • Identifying, detailing and clarifying individual steps to be undertaken in the development and production phases • Allocating resources to the development and production phases • Identifying individual responsibilities for the pre-development and production phases including the roles of internal and external people • Specifying timelines and target dates for the completion of components of each plan • Referring to previous marketing activities as a basis for future marketing activities • Seeking input and comment from relevant stakeholders as appropriate to individual project requirements • Communicating the contents of action plans with relevant stakeholders to explain specific requirements and responsibilities that apply. <p><i>Target(s) for the items</i> may relate to:</p> <ul style="list-style-type: none"> • Internal customers • External customers, including other organisations within the marketing and/or distribution chain and designated customer target markets
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	<ul style="list-style-type: none"> • The geographical location of the customer • Consideration of market research data relating to targets, including demographic characteristics and data relating to customer regarding how they prefer to receive their information. <p><i>Content for the items may relate to:</i></p> <ul style="list-style-type: none"> • Products and services to be targeted in the material, including consideration of individual products, services and combination packages • Currency of the items, including estimating the potential lifespan for each item taking into account prices, costs and changing circumstances as they apply to individual projects • Alignment with stated objectives • Logos, text/copy, graphics, art work and photographs • Mandatory inclusions including company logos and statements, contact details, affiliations and indications of Quality Assurance (QA) alignment • Seeking input from relevant internal personnel and external stakeholders, including consideration of sub-agents and joint venture partners. <p><i>Format and layout for the items may include:</i></p> <ul style="list-style-type: none"> • Selecting single page leaflets, bi-fold and/or tri-fold options • Determining font to be used throughout or in defined sections of the items • Identifying print size to be used • Determining the use of colour, including consideration of black and white, limited colour or full-colour • Determining length of the finished product in terms of pages • Selecting stock size, quality and colour to be used for page layouts incorporating distribution considerations, such as mailing, costs, stocking and display requirements of distributors
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- Positioning text, graphics, photographs on the stock or marketing item
- Enabling sufficient space for required text and information
- Liaising with internal and/or external graphic artists and printers
- Applying basic design principles, including aesthetic appeal, harmony, flow and sequencing, balance, spacing and hierarchy of headings/sub-headings.

Language for the items may include:

- Preparing items in languages appropriate to the target markets, including the use of foreign language, where appropriate
- Using appropriate idioms and terminology for local and target markets
- Appropriate and selective use and/or explanation of industry terminology.

Prices to be stated in the items may include:

- Ensuring accuracy and comprehensiveness of all prices and charges
- Ensuring prices, tariffs are valid only until a stated date
- Ensuring a statement that prices and charges are subject to change without notification is included
- Including prices that are relevant to the specific target audiences of the brochures or marketing materials, including the need to list wholesale prices, commissions, available discounts for trade audiences but not for retail customers
- Ensuring the currency used in the items is relevant to the language being used and/or target market audiences or destinations
- Verifying with management that prices to be included in items are correct and acceptable
- Not releasing any items until pricing issues have been verified and approved by management.

Copy for the items may include:

- Determining the use of headings, headlines, headers and footers
- Determining copy style including factual, imaginative, authoritative, whimsical, contemporary or emotional
- Ensuring clarity of information provided
- Identifying key messages and supplementary messages
- Including special offers, incentives and/or competitions, as required
- Incorporating the AIDA principle, grabbing Attention; appealing to self-Interest; arousing a Desire to buy; urging people to take Action
- Personalising the message
- Using specifics rather than generalisations
- Using trigger words to encourage responses
- Including maps in the items, where appropriate
- Including messages from joint venture or sponsorship partners
- Ensuring material is copyright free.

Provide resources may include:

- Supplying funding
- Arranging for professional external assistance
- Allocating sufficient and appropriate time
- Organising for the inclusion of relevant internal expertise.

Proof read material may include:

- Checking to ensure materials do not give offence
- Ensuring freedom from spelling, grammatical or typographical errors

	<ul style="list-style-type: none">• Verifying the inclusion of all required information• Checking that facts and figures contained in the item are accurate, current, relevant and comprehensive• Ensuring there are no last-minute changes to the information contained within the items. <p><i>Circulate items for comment</i> may include:</p> <ul style="list-style-type: none">• Presenting material to management and partners to obtain their final comments• Obtaining approval to proceed with the proposed items. <p><i>Meet and discuss the proposal with service providers</i> may include:</p> <ul style="list-style-type: none">• Graphic artists• Graphic designers• Printers• Obtaining and evaluating samples of work done by potential service providers• Selecting a service provider with previous relevant industry experience and a proven and successful history. <p><i>Detailed specifications</i> may include:</p> <ul style="list-style-type: none">• Defining the decisions relating to:<ul style="list-style-type: none">▪ Quantities/volume required▪ Number of colours▪ Type of stock▪ Number of photographs▪ Layout and style of text▪ Production deadlines
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	<ul style="list-style-type: none">• Presentation of draft sample• Determining terms and conditions of the contract that are acceptable and/or non-negotiable. <p><i>Obtain quotations</i> may include:</p> <ul style="list-style-type: none">• Ensuring quotations received accommodate the stated requirements of the specifications supplied• Ensuring quotations are received from a number of different service providers in keeping with internal requirements to obtain a variety of quotations prior to making a purchasing decision• Determining the finishing requirements that will apply to hard copy items including folding, trimming, stitching or stapling, as appropriate. <p><i>Evaluate quotations</i> may include:</p> <ul style="list-style-type: none">• Comparing quotations received from different service providers• Assessing quotations against identified criteria for the production of items as contained in the specifications supplied to potential service providers. <p><i>Monitor production activities</i> may include:</p> <ul style="list-style-type: none">• Liaising with suppliers to ensure specified targets and requirements are being met• Meeting with service providers on a regular basis to enable emerging issues to be highlighted and addressed• Responding to requests for information and/or direction• Making production decisions to move the project forward, including decisions regarding production variations that occur during the production phase.
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Proof read material that is produced as final items may include:

- Checking proofs for accuracy and compliance with initial draft
- Advising service providers of errors and/or changes that need to be made to proofs prior to final production
- Checking revised proofs, if required.

Authorise production may include:

- Signing off on proof to give authority for final production
- Making payment in accordance with agreed contractual conditions
- Filing documentation and communications between the organisation and service providers.

Check items supplied may include:

- Verifying final items match approved proofs
- Checking colour and print clarity
- Checking finishing that has been applied
- Checking quantities supplied
- Verifying distribution activities relating to items where these were agreed to as part of the production contract
- Authorising final payment for services rendered by service providers.

Assessment Guide

The following skills and knowledge must be assessed as part of this unit:

- Enterprise policies and procedures in regard to marketing, advertising and the production of materials that represent the organisation
- Principles of promotion and copy writing

- Knowledge of alternatives that exist in the development of brochures and marketing materials
- Understanding of the brochures and marketing materials used by the competition and elsewhere in the relevant industry sector
- Legislation that relates to fair trading, consumer protection, copyright and truth in advertising
- Ability to use coordination, project management and negotiation skills and techniques
- Knowledge of quality indicators that apply to materials produced
- General knowledge of the printing, graphic design and graphic artist industries
- Knowledge of factors that relate to production decisions including mailing costs, distribution costs, requirements by partners and associated promoters.

Linkages To Other Units

- Access and retrieve computer-based data
- Develop a marketing strategy and coordinate sales activities
- Establish and maintain a business relationship
- Produce documents, reports and worksheets on a computer
- Gather and present product information
- Prepare business documents
- Use common business tools and technology
- Lead and manage people
- Manage legal requirements for business compliance
- Monitor staff performance
- Provide professional support to business colleagues
- Develop and update tourism industry knowledge

	<ul style="list-style-type: none"> • Promote products and services to customers • Source and package tourism products and services • Source and provide destination information and advice • Create, implement and evaluate strategic product initiatives • Develop, implement and evaluate sponsorship plans • Develop, manage and evaluate local marketing strategies • Promote tourism products and services • Plan and implement sales activities • Source and present information • Lead and manage a development team • Monitor workplace operations. <p>Critical Aspects of Assessment</p> <p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • Understanding of host enterprise policies and procedures in regard to marketing, advertising and the production of materials that represent the organisation • Demonstrated ability to identify the brochures and marketing materials required to support the attainment of organisational objectives in a defined context and develop effective and comprehensive action plans to guide the development of final items • Demonstrated ability to oversee the development of a nominated draft item for presentation to a service provider, such as a printer, ensuring the material for inclusion is appropriate for the target audience, does not give offence, is legally compliant and is appropriate and acceptable in terms of content, accuracy, format, layout, language and copy writing style
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- Demonstrated ability to undertake dealings with an internal or external service provider to submit a draft item for discussion, negotiate a contract for the delivery of services, obtain a nominated number of quotations for the job, proof read the material and give final approval for the production phase
- Demonstrated ability to oversee the production of nominated brochures and/or marketing materials including responding to production issues, checking the finished product and finalising payment and other internal and operational requirements.

Context of Assessment

Assessment must ensure:

- Actual or simulated workplace application of skills and knowledge to manage the development and production of actual brochures and marketing materials, including consultation and interaction with external service providers however, there is no necessity for the brochures and marketing materials to be produced by an external professional provider.

Resource Implications

Training and assessment must include identification of one or more real objectives for the brochures and marketing materials and interaction with real service providers, real internal staff with relevant expertise, where appropriate, real materials and a real industry context.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Observation of practical candidate performance
- Analysis of hard copy materials produced as part of the project including draft items, contracts, sample materials, action plans, proofs and final products
- Discussions with members of target audiences to identify the effectiveness of materials that have been produced
- Role plays
- Oral and written questions

- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit

Level 1 = competence to undertake tasks effectively

Level 2 = competence to manage tasks

Level 3 = competence to use concepts for evaluating

Key Competencies	Level	Examples
Collecting, organising and analysing information	2	Validate information for inclusion in brochures and marketing materials
Communicating ideas and information	1	Share organisational requirements with development staff and external service providers
Planning and organising activities	2	Organise staff activities and the services of external service providers to produce brochures and marketing materials
Working with others and in teams	2	Assist colleagues and provide resources to develop copy, layout and content for draft items
Using mathematical ideas and techniques	3	Determine the acceptability of quotations received from service providers
Solving problems	2	Resolve copy, content and production issues
Using technology	2	Determine the technologies to be used in the production of brochures and marketing materials