

Competency Standard

UNIT TITLE: DEVELOP, MANAGE AND EVALUATE LOCAL MARKETING STRATEGIES		NOMINAL HOURS: 80
UNIT NUMBER: D2.TCS.CL5.13		
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to develop, manage and evaluate marketing plans and strategies.		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1: Determine the internal business environment</p> <p>1.1 Identify and confirm <i>business orientation</i></p> <p>1.2 Assess <i>past local marketing activities</i></p> <p>1.3 Analyse local <i>performance information</i> from all areas of the business</p> <p>1.4 Assess <i>local product and service range</i></p> <p>1.5 Evaluate the <i>marketing information system</i> used by the organisation</p> <p>1.6 Describe the use of the <i>marketing mix</i> in relation to <i>local identified target markets</i> and current <i>marketing strategies</i></p> <p>1.7 Record and report the information identified and the conclusions reached</p> <p>Element 2: Determine the external business environment</p> <p>2.1 Describe information relating to local <i>opportunities and threats</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 all industry sectors that subscribe to a structured marketing approach to their sales and promotional activities 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>Business orientation</i> may be related to:</p> <ul style="list-style-type: none"> • Core activities, describing why the organisation is in business • Customer bases, including target markets and understanding of the demographic characteristics that apply • Business values, to guide the ethical position adopted by the organisation in terms of the businesses and countries it will deal with and the business practices it will adhere to • Current business direction, such as growth, contraction, new markets, re-direction and local business focus. 	

<p>2.2 Analyse local <i>comparative market information</i></p> <p>2.3 Analyse local <i>industry and customer trends</i></p> <p>2.4 Analyse <i>legal, ethical and environmental constraints</i> that apply to the business</p> <p>2.5 Record and report the information identified and the conclusions reached</p> <p>Element 3: Prepare local marketing strategies and plans</p> <p>3.1 Describe <i>local opportunities</i> that exist</p> <p>3.2 Develop marketing strategies to support identified local opportunities</p> <p>3.3 Develop <i>marketing plans</i> to support identified local <i>marketing activities</i></p> <p>3.4 Involve <i>relevant personnel</i> in the development phase and solicit their contributions and feedback</p> <p>3.5 Ensure marketing plans comply with <i>all necessary requirements</i></p> <p>3.6 <i>Gain approval for the marketing plan</i></p> <p>Element 4: Manage the local marketing strategies</p> <p>4.1 <i>Communicate the approved marketing plan</i> to those with responsibility for implementation</p> <p>4.2 <i>Implement the activities and strategies</i> contained in the marketing plan</p>	<p><i>Assess past local marketing activities</i> will include:</p> <ul style="list-style-type: none"> • Identifying the campaigns, promotions and other types of marketing initiatives that have been used by the business • Identifying personnel and media involved • Identifying all cost, both monetary and non-monetary associated with those activities • Determining how the campaigns, promotions and other types of marketing initiatives were perceived and received by the target markets and the general public • Quantifying the results of the marketing activities, including intended and unanticipated outcomes, sales and monetary results and comparison with established Key Performance Indicators (KPIs). <p><i>Performance information</i> will involve reference to internal records, such as sales reports, financial statistics, market research, including marketing reports, marketplace trends and business planning documents and may include:</p> <ul style="list-style-type: none"> • Strengths and weaknesses the business has in terms of the market place and identified target markets, including human, intellectual, financial and physical resource strengths and weaknesses • Critical success factors for each revenue centre or department • Current capabilities, including: <ul style="list-style-type: none"> ▪ Human, such as staff numbers, key personnel, morale, leadership and communication between staff ▪ Financial, such as cash flow, debt-equity rates, level of assets, profitability and capital available ▪ Physical resources, such as plant and equipment, quality control, research and development, patents, production methods and e-commerce capacity ▪ Marketing, such as customer base, price structure, distribution, location, promotion and product range
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<p>4.3 <i>Monitor the implementation of the marketing plan</i></p> <p>4.4 <i>Produce reports on the progress of the marketing plans</i></p> <p>4.5 <i>Share information on marketing activities with operational staff</i></p> <p>Element 5: Conduct evaluation of local marketing strategies</p> <p>5.1 <i>Evaluate marketing activities against agreed key performance indicators</i></p> <p>5.2 <i>Adjust marketing plans in response to information received about progress achieved</i></p> <p>5.3 <i>Implement changes to initial local marketing plans</i></p>	<ul style="list-style-type: none"> • Existing resources and /or resources the business has access to and/or the authority to use, including funding and market/product knowledge • Relevant operational factors, including, hours of operation, location, staff skill levels and communication capacities • Need for specialist assistance, including special assistance in the operation of the business and in terms of marketing expertise • Need for immediate market research to provide information in relation to identified gaps in marketing intelligence. <p><i>Assess local product and service range may include:</i></p> <ul style="list-style-type: none"> • Identifying the performance levels of all products and services being offered for sale, including under-performing lines and best performing lines • Grouping similar products and services • Identifying reasons for under-performing lines and best performing lines • Comparing products and services on offer to those offered by local competitors. <p><i>Marketing information system will relate to:</i></p> <ul style="list-style-type: none"> • Marketing intelligence • Market research data and information • Marketing decisions support, including personnel involved and relevant scopes of authority. <p><i>Marketing mix includes:</i></p> <ul style="list-style-type: none"> • Price • Product • Place • Promotion.
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Local identified target markets may include:

- a specific product or service, new or existing
- A destination
- A single event
- Community products and events.

Marketing strategies refer to:

- Description of how the objectives of the marketing plan will be achieved, identifying the market segments to be targeted and explaining how the products and services offered to them will be positioned in the market place
- Marketing strategies must be consistent with the direction, values and business plans of the organisations; examples of marketing strategies may be:
 - To target the corporate travel sector
 - To increase supplementary sales to ticket purchasers.

Opportunities and threats should relate to:

- Market growth trends and projected potential, including general market trends as well as specific data relating to identified target markets as appropriate to the business
- Risk factors relating to the industry sector under consideration, including weather events, terrorism, political unrest and travel warnings
- Competition, including identifying new entrants, businesses that have left the industry, activities being undertaken by competition, impact of competitor activity on business performance including sales and profits, their marketing strategies, objectives, strengths and weaknesses
- Legislation and government policy, including how these changes may/will impact on the business and the local area, events and similar

- Identifying changes in technology that have demonstrated the ability, or the potential to impact the industry, such as e-commerce initiatives, including web-based promotion, on-line booking, electronic payment and e-ticketing
- The economy, identifying inflation, interest rates, credit availability, level of unemployment, availability of suitably trained, experienced and qualified staff to undertake identified duties within the business, level of economic activity and population changes
- Suppliers, including consideration of mergers/monopolies, prices, distribution, competition, franchise arrangements, sub-agencies, national and multi-national companies
- The process of assessing internal Strengths and Weaknesses in conjunction with external Opportunities and Threats is referred to as a Situational Analysis (SWOT analysis).

Comparative market information may include:

- Best practice information, including local industry standards, recommendations by regional/national bodies and world-wide standards
- Benchmarking, such as comparing host enterprise performance and practices against accepted world-wide/industry-wide best practice
- Competitor information, including service levels, staff numbers, trading hours, locations, prices charged, special deals, promotional activities, products and services offered, level of user satisfaction with opposition service provision.

Industry and customer trends will refer to current and projected/anticipated issues and may include:

- Economic factors, including currency exchange rates, recessions and value of relevant currencies
- Ecological and environmental factors, including carrying capacities, issues relating to organisational values, sustainability and responsible tourist functions and activities, environmental impact statements and reports

- Social and cultural factors, including the impact of tourism activities on local societies and their enjoyment of, respect for and protection of their culture
- Technological changes and how they might impact on customers in terms of sourcing information, lodging bookings, making payment and receiving tickets
- Industrial factors, including the capacity and capability of support service providers to deliver the required underpinning products and services to enable the delivery of identified products and services.

Legal, ethical and environmental constraints may include:

- Organisational policies relating to business ethics, company values and beliefs
- Legislated operational obligations
- Registration compliance requirements
- Compliance with industry, peak body and government agency codes of practice
- Complying with cultural expectations and influences of local communities
- Ensuring promises made in relation to non-mandated issues are met
- Supporting social responsibilities by being a responsible corporate citizen.

Local opportunities must relate to specific opportunities identified by the internal and external analysis of the business environment and may relate to:

- Products
- Services
- Packages
- Specific business objectives and directions
- Identified target markets
- Strengths of the organisation
- Competitive advantages that the organisation holds in the marketplace.

Marketing plans must include:

- Allocating resources, including financial, human, physical and time
- Allocating responsibilities for implementing nominated aspects of the plan
- Determining objectives
- Identifying and describing marketing activities to be undertaken
- Identifying target markets to which each activity applies
- Identifying planned monitoring to check on implementation
- Specifications of key performance indicators to determine effectiveness of the plan
- Communicating and explaining the plan to relevant personnel
- Determining timelines for effective implementation of the plan, including establishing milestones, where appropriate.

Marketing activities refers to:

- Specific actions to be taken to enable the attainment of the specified marketing strategy: examples include:
 - Undertaking media advertising
 - Conducting a competition
 - Using a personal sales team.

Relevant personnel may include:

- Marketing personnel
- Sales staff
- Customer contact staff
- Market research specialists, including external businesses employed on a fee-for-service basis

- Head office
- Managers and supervisors
- Customers
- Joint venture partners.

All necessary requirements refers to:

- Compliance with externally imposed compliance obligations
- Internal policies and procedures
- Internal values and beliefs
- Ethical standards
- Relevant codes of practice to which the organisation subscribes.

Gain approval for the marketing plan may include:

- Forwarding draft plan with recommendation for approval to management
- Preparing the submission according to specified internal requirements
- Distributing multiple copies of the draft to an identified network of decision makers
- Speaking about the plan and explaining aspects, as required
- Providing supplementary supporting and/or additional information to assist in the final decision making process
- Revising the draft plan on the basis of feedback from the decision makers.

Communicate the approved marketing plan may include:

- Explaining priorities
- Explaining all elements of the plan
- Explaining the need for the marketing plan in terms of business performance, market share, position and the ongoing viability of the organisation

- Clarifying responsibilities and scopes of authority for action
- Identifying support available for responsible personnel
- Reviewing company aims and objectives and explaining how the marketing plan fits with these
- Highlighting progress points/milestones along the way
- Explaining the reporting and monitoring processes
- Defining how the performance of individuals and the overall plan will be assessed.

Implement the activities and strategies may include:

- Ensuring the details of the approved marketing plan are implemented as intended and on time
- Providing assistance to those with specific responsibilities
- Supporting responsible personnel by back-filling them with other staff as necessary
- Maintaining a high profile for the marketing activities so they remain a priority for the business and the staff
- Encouraging staff
- Recognising and acknowledging performance and compliance with marketing plan requirements.

Monitor the implementation may include:

- Observing responsible personnel undertaking designated activities
- Reviewing quotations received from suppliers for undertaking marketing activities, including advertising, promotional activities, merchandising, elements of packages, product and service providers
- Checking expenditure related to the activities

- Conducting regular progress meetings to keep the plan on track, discussing issues arising and making/assisting with operational decisions
- Meeting with suppliers/providers to review their progress in relation to their involvement with identified/contracted areas of work.

Produce reports may include:

- Making verbal presentation to stakeholders and management
- Providing written reports
- Noting the extent to which the implementation of the marketing plan is adhering to the budget and time-related guidelines set out in the plans
- Making recommendations to bring the plan back on track where it is behind schedule
- Making recommendations for cost re-allocations where the activities exceed projected levels
- Highlighting issues arising that have had, or may have, an impact on the completion of the project on time and/or on its eventual effectiveness.

Share information on marketing activities with operational staff may include:

- Keeping staff aware of progress
- Maintaining focus on the identified target markets and objectives
- Making staff aware of the objectives
- Informing staff on how the identified activities and strategies will impact on their individual customer contact and/or selling roles, including:
 - Explaining the deals being advertised
 - Advising staff of special prices that apply
 - Advising staff in relation to new and/or revised terms and conditions
 - Presenting samples of relevant advertising and other promotional materials
- Advising staff of relevant start and finish dates/times for promotional activities.

Key performance indicators may include:

- Enquiries received, including on-line enquiries, face-to-face enquiries, telephone enquiries, responses to targeted media calls to action, requests for mailed information
- Bookings received
- Advanced deposits collected
- Changes to customer database numbers and details
- New customers attracted and/or with whom contact has been made
- Sales made, including distinguishing sales by value, unit type and target market buying group
- Judging return on investment for monies expended on advertising and promotional activities
- Assessing changes, where applicable, to company image and reputation in the market place
- Gauging level of public awareness in relation to specific marketing activities.

Adjust marketing plans may include:

- Providing supplementary resources to extend the marketing activities
- Amending marketing alternatives being used, including changing media used, revising frequency of advertising and altering advertising content
- Retreating from activities that are demonstrably not working, or which are counter-productive
- Extending a limited offer
- Re-allocating responsibilities for marketing activities
- Modifying timelines in response to positive and negative issues arising
- Responding to action taken by competitors in response to marketing activities undertaken by the organisation.

Implement changes may include:

- Revising plans
- Communicating revisions to relevant people, including sales and customer contact staff
- Providing identified resources
- Ensuring previous arrangements are altered on the basis of revisions made, including agreements with advertisers, joint venture partners, suppliers and similar.

Assessment Guide

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

- Enterprise policies and procedures in regard to setting business direction, business performance goals, marketing practices and objectives
- Knowledge of the local travel and tourism industry including operators, trends, products, services, prices and similar,
- Principles of market research, data collection and analysis
- Knowledge of marketing planning techniques and formats
- In-depth knowledge of travel/tourism marketing and distribution networks
- Knowledge of legal issues relating to marketing activities
- Ability to prepare and present reports
- Knowledge of and ability to use management, leadership, influencing, negotiation, communication, problem solving and team building skills.

Linkages To Other Units

- Access and retrieve computer-based data
- Develop and update local knowledge
- Develop a marketing strategy and coordinate sales activities

- Establish and maintain a business relationship
- Develop and implement a business plan
- Develop new products and services
- Produce documents, reports and worksheets on a computer
- Plan and establish systems and procedures
- Use common business tools and technology
- Manage financial performance within a budget
- Develop and supervise operational approaches
- Manage legal requirements for business compliance
- Provide professional support to business colleagues
- Develop and update tourism industry knowledge
- Promote products and services to customers
- Prepare and deliver a presentation
- Source and package tourism products and services
- Maintain contacts with handling agents
- Build and maintain a team approach to service delivery
- Construct and apply tourism product research
- Coordinate production of brochures and marketing materials
- Create, implement and evaluate strategic product initiatives
- Plan and implement sales activities
- Promote tourism products and services
- Develop and manage business strategies

- Manage and monitor innovative tourism programs and projects
- Manage contractual agreements/commitments
- Lead and manage a development team
- Monitor workplace operations
- Prepare and monitor budgets.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of host enterprise policies and procedures in regard to setting business direction, business performance goals, marketing practices and objectives
- Demonstrated ability to identify the internal and external business environment that applies to a real or simulated industry operation and prepare a comprehensive, viable and effective set of marketing plans, including details relating to marketing strategies and marketing activities to address identified opportunities and threats in order to optimise sales and profits for nominated target markets/nominated products and services, where appropriate
- Demonstrated ability to describe effective and reliable monitoring, evaluation and reporting procedures that should apply to the above assessment activity.

Context of Assessment

This unit may be assessed on or off the job:

- Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge
- Assessment must relate to the individual's work area or area of responsibility.

Resource Implications

- Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools and equipment.

Assessment Methods

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

- Case studies
- Observation of practical candidate performance
- Oral and written questions
- Analysis of portfolio of evidence generated by the candidate which may include research material, draft/final plans, strategies, activities, budgets, minutes of meetings and meeting agendas
- 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	3	Evaluate information in order to determine marketing strategies to be pursued
Communicating ideas and information	3	Share marketing information and marketing plans with staff and management
Planning and organising activities	3	Determine the marketing activities to be undertaken, their timing, frequency and the personnel and businesses to be involved

	Working with others and in teams	3	Monitor marketing team performance in implementation of marketing plans
	Using mathematical ideas and techniques	2	Calculate costs and budgets to support marketing strategies
	Solving problems	3	Address instances where the projected objectives for a marketing plan are not being achieved
	Using technology	2	Use the internet for research, to disseminate information to stakeholders; use software programs to capture and manipulate market research data