

## Marketing

National Occupational Standards

January 2013

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# CFAMAR1

## Design and plan marketing research



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### Overview

This standard is about designing and planning marketing research. It includes agreeing the objectives, timescale and budget for the research, identifying the key areas to be covered, recommending appropriate research methods and setting out a marketing research plan. It is for marketing professionals who design and plan marketing research.

# CFAMAR1

## Design and plan marketing research

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### Performance criteria

- You must be able to:*
- P1 identify and agree research objectives
  - P2 agree the approach to the research
  - P3 identify the key areas to be researched
  - P4 agree a realistic timescale and budget for the research
  - P5 establish sources of relevant information
  - P6 recommend the appropriate research method(s) for collecting the required information within agreed budget and timescale
  - P7 identify the risks associated with the research and how these are to be mitigated
  - P8 where appropriate, provide a brief for those who will be carrying out the research
  - P9 identify an appropriate population sample
  - P10 identify and produce relevant research materials
  - P11 set out a marketing research plan and rationale for the approaches taken
  - P12 agree the plan with decision-makers

# CFAMAR1

## Design and plan marketing research

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### Knowledge and understanding

*You need to know and understand:*

- K1 the principles, strengths and limitations of a range of research methods for collecting information
- K2 the strengths and weaknesses of primary and secondary research
- K3 how to identify and select the most appropriate solution to a research problem
- K4 how to plan a research project, taking into account time and budgetary constraints
- K5 types of risk associated with marketing research and how these can be mitigated
- K6 how to provide a research brief
- K7 the sampling techniques to be considered and how to select the most appropriate for the population
- K8 types of research materials and how to select the most appropriate for a given piece of research
- K9 current best practice and latest developments in research methods and materials

# CFAMAR1

## Design and plan marketing research

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR1
<b>Relevant occupations</b>	1132 Marketing and Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations

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## Overview

This standard is about collecting marketing research data using relevant research methods, in line with the research plan and within legal, regulatory and ethical requirements. It includes communicating appropriately with participants and using active listening to clarify points and check understanding. It is for marketing professionals who collect marketing research data.

## CFAMAR2

### Collect marketing research data

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#### Performance criteria

*You must be able to:*

- P1 conduct research in line with legal requirements, industry regulations, organisational policies and professional and ethical codes of conduct
- P2 collect marketing research data in line with the research plan, using appropriate research methods
- P3 confirm that participants understand the data collection process, the purpose of the research and the timescales involved
- P4 communicate appropriately with participants
- P5 present information to participants clearly, concisely and accurately
- P6 use active listening to clarify and check mutual understanding
- P7 record findings accurately and fully, in line with the requirements of the research plan

# CFAMAR2

## Collect marketing research data

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### Knowledge and understanding

*You need to know and understand:*

- K1 the ethical and legal frameworks which underpin data collection
- K2 the methods involved in the collection of data
- K3 the circumstances in which particular methods are used
- K4 how the purpose of the research might affect a participant's willingness to participate and how to respond appropriately
- K5 how to select the most appropriate communication methods for participants and the research situation
- K6 the strengths and weaknesses of different data collection methods
- K7 how to record data accurately and fully in the context of a particular research project

## CFAMAR2

### Collect marketing research data

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR2
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations

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**Overview**

This standard is about analysing quantitative and qualitative marketing research data. It includes the appropriate handling of data, selecting methods of analysis that are consistent with the research objectives and documenting the outcomes and findings of the analysis in an appropriate format for the intended audience. It is for marketing professionals who analyse marketing research data.

# CFAMAR3

## Analyse marketing research data

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### Performance criteria

- You must be able to:*
- P1 identify research parameters and targets
  - P2 confirm the purpose and objectives of the research
  - P3 prepare data in a format that is appropriate to the purpose and objectives of the research
  - P4 select methods of analysis relevant to the research objectives
  - P5 analyse the data to the required depth and accuracy
  - P6 investigate and analyse any identified variances in responses
  - P7 seek guidance and/or clarification to aid understanding, where necessary
  - P8 maintain accurate records of analysis
  - P9 document the outcomes and findings of the analysis in a format to suit the intended audience

# CFAMAR3

## Analyse marketing research data

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### Knowledge and understanding

*You need to know and understand:*

- K1 legal, regulatory and ethical requirements that relate to marketing research
- K2 techniques for preparing data for analysis
- K3 the principles, strengths and limitations of a range of analysis methods
- K4 how to select and use methods of analysis appropriate to research objectives
- K5 how to apply analysis methods to interrogate data for required information
- K6 how to maintain accurate records of analysis in the context of a particular research project
- K7 how to document the outcomes and findings of the analysis in the most appropriate format for the intended audience

# CFAMAR3

## Analyse marketing research data

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR3
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations

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**Overview**

This standard is about interpreting and presenting the findings of marketing research and identifying patterns within the data. It includes resolving or highlighting errors, inconsistencies, gaps and anomalies in the data, drawing justified conclusions based on the evidence and making reasoned recommendations. It is for marketing professionals who interpret and present the findings of marketing research.

## CFAMAR4

### Interpret and present marketing research findings

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#### Performance criteria

*You must be able to:*

- P1 evaluate the marketing research data using appropriate methods
- P2 confirm the reliability and validity of the findings
- P3 identify issues, trends, themes, linkages and interdependencies from the analysis of the marketing research data
- P4 resolve and/or highlight errors, inconsistencies, gaps and anomalies in the marketing research data
- P5 identify and prioritise critical issues
- P6 make clear the level of confidence, risks and assumptions on which the interpretation is based
- P7 seek guidance and/or clarification to aid understanding of the data , where necessary
- P8 draw justified conclusions based on the evidence
- P9 make reasoned recommendations based on the conclusions
- P10 present the findings, conclusions and recommendations in a format to suit the intended audience

# CFAMAR4

## Interpret and present marketing research findings

---

### Knowledge and understanding

*You need to know and understand:*

- K1 methods of ensuring the quality of the data
- K2 the ways in which the quality of the data can affect marketing research findings
- K3 methods for ensuring reliability and validity of data, including comparison with historical data and norms
- K4 what is meant by statistical significance and how to apply this in setting out levels of confidence
- K5 the purpose of setting out risks and assumptions made in the interpretation of data
- K6 the strengths and weaknesses of different presentational formats and how to select the most appropriate format for the audience

# CFAMAR4

## Interpret and present marketing research findings

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<b>Developed by</b>	Skills CFA
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<b>Version number</b>	2
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<b>Date approved</b>	January 2013
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<b>Indicative review date</b>	January 2016
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating organisation</b>	Skills CFA
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<b>Original URN</b>	CFAMAR4
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<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
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<b>Suite</b>	Marketing (2013)
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<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations
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# CFAMAR5

## Develop a customer insight strategy



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### Overview

This standard is about the development of a customer insight strategy. This involves identifying information priorities in line with the marketing strategy, assessing risks, resources, costs and benefits associated with accessing the information and establishing how the information will be used and analysed to identify insights about the organisation's customers. It is for marketing professionals who are involved in the development of customer insight strategies.

## CFAMAR5

### Develop a customer insight strategy

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#### Performance criteria

- You must be able to:*
- P1 determine the organisation's requirements for customer information
  - P2 identify and clarify the uses of customer information to the organisation
  - P3 identify priorities in customer information to meet the needs of the organisation's marketing strategy and related performance targets
  - P4 assess existing information and identify further sources
  - P5 establish how the information will be analysed and used to identify insights
  - P6 assess the risks, resources, costs and benefits associated with accessing the customer information
  - P7 seek additional advice and guidance from recognised sources of expertise
  - P8 consult on the insight strategy with key stakeholders and gain their commitment
  - P9 agree the customer insight strategy with decision-makers

# CFAMAR5

## Develop a customer insight strategy

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### Knowledge and understanding

*You need to know and understand:*

- K1 legal, regulatory and ethical requirements relating to the collection, storage and use of customer information
- K2 the organisation's marketing strategy and related performance targets
- K3 the organisation's actual and target customer base
- K4 potential sources of customer information
- K5 the factors to consider when identifying priorities in customer information that will meet the needs of the organisation
- K6 how to identify and assess potential risks in relation to customer information
- K7 the factors to assess when determining customer information requirements
- K8 the components to consider in developing a customer insight strategy
- K9 available sources of expertise that can provide advice and guidance
- K10 the purpose of consulting with stakeholders and how to gain their commitment

# CFAMAR5

## Develop a customer insight strategy

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**Developed by** Skills CFA

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**Version number** 2

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**Date approved** January 2013

---

**Indicative review date** January 2016

---

**Validity** Current

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**Status** Original

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**Originating organisation** Skills CFA

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**Original URN** CFAMAR5

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**Relevant occupations** 1132 Marketing & Sales Manager  
3543 Marketing Associate

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**Suite** Marketing (2013)

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**Key words** Marketing, sales, marketing management, market research, advertising, public relations

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### Overview

This standard is about implementing and evaluating a customer insight strategy. It includes agreeing a plan, with timescales and budget, to collect the required information, checking the quality, validity and reliability of the information, identifying insights that will inform marketing approaches and making the information available to the organisation in line with legal, regulatory and ethical requirements. It also includes monitoring and evaluating the customer insight strategy against a set of agreed criteria and making recommendations based on the outcomes. It is for marketing professionals who are involved in implementing and evaluating customer insight strategies.

# CFAMAR6

## Implement and evaluate a customer insight strategy

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### Performance criteria

#### Implement a customer insight strategy

*You must be able to:*

- P1 confirm the customer information required, in line with the customer insight strategy
- P2 agree a plan to collect customer and industry information including timescales and budgets
- P3 collect customer information in line with agreed plan
- P4 check the quality, validity and reliability of customer information
- P5 analyse and structure customer information in an appropriate format
- P6 identify insights from customer information to inform marketing approaches
- P7 develop procedures for storage, use and update of customer information, in line with legal, regulatory and ethical requirements
- P8 inform colleagues and stakeholders ensuring agreed procedures for access and use are followed
- P9 ensure that confidential information is accessed securely

#### Evaluate a customer insight strategy

*You must be able to:*

- P10 establish the criteria required for evaluation of the strategy
- P11 establish when the strategy will be evaluated and the circumstances in which an unscheduled review would be conducted
- P12 monitor continued compliance with legal requirements, codes of practice and organisational procedures
- P13 collect valid and comprehensive data, including feedback from customers and other stakeholders
- P14 evaluate the strategy against the agreed criteria
- P15 make recommendations to modify or maintain the strategy

# CFAMAR6

## Implement and evaluate a customer insight strategy

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### Knowledge and understanding

*You need to know and understand:*

#### Implement a customer insight strategy

- K1 legal, regulatory and ethical requirements relating to the collection, storage and use of customer information
- K2 common data collection and reporting systems used in gathering customer information
- K3 industry information that could be collected and how to use this
- K4 how to check the quality, validity and reliability of customer information
- K5 how to identify insights from customer information that will inform marketing approaches
- K6 how to develop procedures to store, use and update customer information that meet legal, regulatory and ethical requirements
- K7 methods of ensuring the security of confidential data

#### Evaluate a customer insight strategy

*You need to know and understand:*

- K8 how to select and apply appropriate data collection and analysis techniques
- K9 how to evaluate quantitative and qualitative information against the agreed success criteria
- K10 the circumstances in which an unscheduled review would be necessary
- K11 how to summarise and present data
- K12 how to make recommendations to modify or maintain the strategy

## CFAMAR6

### Implement and evaluate a customer insight strategy

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR6
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations

## CFAMAR7

# Develop and maintain a marketing information system



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### Overview

This standard is about developing and maintaining a marketing information system. It includes defining applications for the system, consulting users on the system requirements and developing a business case, maintaining the system's effectiveness and ensuring that it is integrated within wider organisational information systems. It is for marketing professionals who develop and maintain marketing information systems.

# CFAMAR7

## Develop and maintain a marketing information system

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### Performance criteria

#### Develop a marketing information system

- You must be able to:*
- P1 identify the uses for the information system in line with marketing strategies and plans
  - P2 establish the appropriate applications and data components required within the information system
  - P3 consult users on the information system requirements
  - P4 develop a business case for the information system
  - P5 obtain agreement and support for the proposed information system from key stakeholders and decision-makers
  - P6 plan the development of the information system, specifying its functionality
  - P7 ensure the information system is fit for purpose
  - P8 ensure that the information system is fully integrated with other organisational information systems
  - P9 liaise with systems specialists, where, necessary, when developing the information system

#### Maintain a marketing information system

- You must be able to:*
- P10 store information on the information system, checking its quality, validity and reliability
  - P11 maintain the information stored in the information system, ensuring it is accurate and up to date
  - P12 monitor the use of the information system, seeking feedback from users
  - P13 evaluate the fitness for purpose of the information system, making recommendations for improvement

# CFAMAR7

## Develop and maintain a marketing information system

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### Knowledge and understanding

*You need to know and understand:*

#### Develop a marketing information system

- K1 legal, regulatory and ethical requirements relating to the collection, storage and use of information
- K2 the potential applications of information systems
- K3 the data components that might be included within a marketing information system
- K4 the topics that should be covered within a business case
- K5 how to ensure full integration with other organisational information systems

#### Maintain a marketing information system

*You need to know and understand:*

- K6 how to check the quality, validity and reliability of information
- K7 the implications of retaining out of date information
- K8 reasons for ensuring the security of confidential data

## CFAMAR7

### Develop and maintain a marketing information system

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR7
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations

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## Overview

This standard is about obtaining stakeholder feedback. It includes identifying the stakeholders involved and feedback required, using formal and informal processes to obtain feedback, evaluating its reliability and validity and using the feedback to identify relevant trends and patterns and recommend appropriate action. It is for marketing professionals who obtain stakeholder feedback.

# CFAMAR8

## Obtain stakeholder feedback

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### Performance criteria

- You must be able to:*
- P1 identify the stakeholders from whom feedback needs to be sought
  - P2 identify the feedback that is required and the purpose(s) for which it is sought
  - P3 implement formal and informal processes to obtain the required feedback
  - P4 assess the reliability and validity of the feedback
  - P5 identify trends and patterns relevant to the agreed purpose(s)
  - P6 evaluate the feedback to assess any wider implications for the organisation
  - P7 share the feedback with other business functions and key stakeholders, where appropriate
  - P8 identify and recommend timely actions in response to the feedback

# CFAMAR8

## Obtain stakeholder feedback

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### Knowledge and understanding

*You need to know and understand:*

- K1 the range of stakeholders from whom feedback might be required
- K2 the types of feedback that might be provided by stakeholders and how it can be used
- K3 formal and informal processes for obtaining feedback
- K4 the factors to consider when assessing reliability and validity of feedback
- K5 how to analyse the interests of those providing feedback and the implications for its reliability and validity
- K6 how to assess the implications of feedback for the organisation
- K7 how to make recommendations for an appropriate and timely response to feedback

## CFAMAR8

### Obtain stakeholder feedback

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR8
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations

# CFAMAR9

## Develop a customer-focused organisation



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### Overview

This standard is about developing a customer-focused organisation. It includes identifying and developing a vision of how the organisation will work with both existing and target customers, making sure that marketing values are consistent with this vision and with any organisation brand or image and influencing policies, procedures and systems to ensure that these are customer-focused. It is for marketing professionals who are involved in influencing the way that their organisation works with its customers.

# CFAMAR9

## Develop a customer-focused organisation

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### Performance criteria

- You must be able to:*
- P1 identify and develop a vision of how the organisation will work with existing and target customers
  - P2 identify and influence customer-related behaviours expected of people in the organisation, in line with agreed values
  - P3 challenge behaviour that conflicts with expectations
  - P4 agree and communicate marketing-based values consistent with the vision
  - P5 influence the organisation's policies, procedures and systems to ensure that they are customer-focused
  - P6 ensure that values are consistent with any organisational brand and image
  - P7 make sure that the organisation's marketing goals are customer-centred
  - P8 monitor and review values, goals, policies, systems and procedures and identify appropriate changes

## CFAMAR9

### Develop a customer-focused organisation

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#### Knowledge and understanding

*You need to know and understand:*

- K1 the concept of culture as it applies to organisations
- K2 the organisation's vision and strategy
- K3 the organisation's brand and image
- K4 how to profile existing customers
- K5 how to identify target customers
- K6 effective methods of communicating values and supporting their application
- K7 methods of influencing goals, policies, systems and procedures to ensure that they are customer-focused
- K8 how to identify behaviours that will support agreed values
- K9 ways of influencing behaviour that conflicts with expectations

## CFAMAR9

### Develop a customer-focused organisation

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<b>Developed by</b>	Skills CFA
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<b>Version number</b>	2
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<b>Date approved</b>	January 2013
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<b>Indicative review date</b>	January 2016
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating organisation</b>	Skills CFA
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<b>Original URN</b>	CFAMAR9
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<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
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<b>Suite</b>	Marketing (2013)
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<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations
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## CFAMAR10

### Ensure marketing activities comply with legal, regulatory and ethical requirements



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#### Overview

This standard is about carrying out marketing activities in ways that are consistent with organisational values and ethical principles and in line with legal and regulatory requirements. It includes developing policies and procedures to ensure that these requirements are met, making sure that appropriate colleagues and stakeholders understand the implications for the organisation if policies and procedures are not followed and keeping up to date with current developments and best practice. It is for marketing professionals who have responsibility for ensuring that marketing activities comply with legal, regulatory and ethical requirements.

## CFAMAR10

### Ensure marketing activities comply with legal, regulatory and ethical requirements

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#### Performance criteria

- You must be able to:*
- P1 develop and implement marketing policies and procedures to ensure that the organisation meets all current legal, regulatory and ethical requirements
  - P2 ensure that all appropriate colleagues and stakeholders have a clear understanding of marketing policies and procedures and the implications for the organisation if they are not followed
  - P3 monitor the use of marketing policies and procedures and provide support to colleagues as necessary
  - P4 encourage feedback from colleagues and stakeholders and take appropriate action if marketing policies and procedures are not met
  - P5 keep up to date with current developments and best practice regarding legal, regulatory and ethical requirements in marketing
  - P6 review and update marketing policies and procedures to take account of new developments and best practice

## CFAMAR10

### Ensure marketing activities comply with legal, regulatory and ethical requirements

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#### Knowledge and understanding

*You need to know and understand:*

- K1 legal, regulatory and ethical requirements that relate to marketing activities
- K2 how to develop marketing policies and procedures that take account of current legal, regulatory and ethical requirements
- K3 the implications for the organisation if marketing policies and procedures are not followed and how to communicate these to colleagues and stakeholders
- K4 methods of monitoring the use of marketing policies and procedures
- K5 the range of actions that may be appropriate if marketing policies and procedures are not met
- K6 sources of information on current developments and best practice regarding legal, regulatory and ethical requirements in marketing

## CFAMAR10

Ensure marketing activities comply with legal, regulatory and ethical requirements

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<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR10
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations

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## Overview

This standard is about assessing new markets, or building on existing markets. It includes identifying the way in which a market operates and the needs of that market for products and/or services, assessing cultural and behavioural factors that may impact on the market and making a realistic assessment of opportunities and threats to the organisation in entering, or expanding within, that market. It also includes developing a business case and marketing plan for a specific market. It is for marketing professionals who assess market opportunities.

# CFAMAR11

## Assess market opportunities

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### Performance criteria

#### Assess the market

*You must be able to:*

- P1 identify the way in which the market operates, including any barriers to trade or entry
- P2 assess the environment and outlook of the selected market
- P3 assess the needs of the market for products and/or services and associated opportunities for the organisation
- P4 determine how potential customers in the chosen market perceive and use the types of products and/or services offered by the organisation
- P5 assess the potential impact on the market of cultural or behavioural factors
- P6 identify potential competitors in the market
- P7 assess the strengths and weaknesses of potential competitors' marketing strategies and tactics
- P8 identify and assess opportunities and threats for the organisation based on a realistic market assessment of current business strengths and weaknesses

#### Develop a business case and marketing plan for a specific market

*You must be able to:*

- P9 define and agree the marketing objectives
- P10 identify the physical, human and financial resources required to achieve the market potential
- P11 consult with appropriate sources of expertise
- P12 produce a forecast of return on investment
- P13 identify the risks to the organisation of developing the selected market
- P14 set out a strategy for developing the market, including costs and benefits of possible options
- P15 identify the selected groups of customers to be targeted, based on a realistic assessment of their purchasing potential
- P16 present and agree the business case and marketing proposals with decision makers

# CFAMAR11

## Assess market opportunities

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### Knowledge and understanding

*You need to know and understand:*

#### Assess the market

- K1 legal, regulatory and ethical requirements relating to the organisation's products and/or services within the market
- K2 current and emerging trends and developments in the targeted sector
- K3 potential barriers to trade
- K4 factors to consider when assessing the environment and outlook of the selected market
- K5 the factors to consider when assessing the needs of the selected market
- K6 how cultural and behavioural factors can influence the actions of potential customers
- K7 how political, technological, social and economic factors can influence the selected market
- K8 how to identify and assess opportunities and threats to the organisation

#### Develop a business case and marketing plan for a specific market

*You need to know and understand:*

- K9 different ways of entering or developing markets and their implications for the organisation
- K10 risks associated with entering or developing new and existing markets
- K11 available sources of expertise
- K12 the topics to be covered within a business case and marketing plan

# CFAMAR11

## Assess market opportunities

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR11
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations

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### Overview

This standard is about creating and/or evolving a marketing strategy in line with organisational objectives and the organisation's business plan. It includes reviewing the implications of legal requirements, codes of practice and organisational policy, taking account of external and internal influences and trends, assessing risks and identifying mitigating factors and establishing the criteria against which the strategy will be evaluated. It is for marketing professionals who create and/or evolve marketing strategies.

# CFAMAR12

## Create and evolve a marketing strategy for an organisation

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### Performance criteria

- You must be able to:*
- P1 identify if the organisation has a marketing strategy or if one needs to be created
  - P2 review and evaluate existing marketing strategies against organisational needs
  - P3 specify appropriate timescales for the development of the marketing strategy
  - P4 identify strategic marketing objectives consistent with the organisation's overall strategy and business plan
  - P5 review the implications of all legal requirements, codes of practice and organisational policies and procedures
  - P6 take account of external and internal influences and trends
  - P7 assess the risks associated with the marketing strategy and how these will be mitigated
  - P8 establish the criteria by which the strategy will be evaluated
  - P9 seek advice and guidance from recognised sources of expertise
  - P10 consult with key stakeholders to gather feedback
  - P11 obtain decision-makers' agreement on the strategy
  - P12 monitor the strategy and make appropriate adjustments in line with organisational needs

# CFAMAR12

## Create and evolve a marketing strategy for an organisation

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### Knowledge and understanding

*You need to know and understand:*

- K1 how to develop a marketing strategy
- K2 how to establish the link between the proposed marketing strategy and the organisation's overall strategy and business plan
- K3 how to assess the likely impact of the marketing strategy on other organisational functions
- K4 current legal requirements, codes of practice and organisational policies and procedures
- K5 how to identify and take into account the external and internal influences and constraints that could affect the development of the marketing strategy
- K6 the types of market, competitor, stakeholder and business risks associated with marketing strategies and how these can be mitigated
- K7 relevant sources of advice and expertise
- K8 how to gain support from the decision makers
- K9 methods of monitoring the strategy and the circumstances in which it is appropriate to make adjustments

## CFAMAR12

### Create and evolve a marketing strategy for an organisation

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR12
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations

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## Overview

This standard is about developing a strategy for a brand. It includes establishing the rationale and target market for the brand, identifying potentially competing brands, setting out the characteristics that the brand is intended to communicate and selecting a name and/or design for the brand in line with its objectives and purpose. It is for marketing professionals who develop brand strategy.

# CFAMAR13

## Develop brand strategy

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### Performance criteria

#### Establish brand purpose

- You must be able to:*
- P1 establish and agree with key stakeholders the rationale for developing a brand
  - P2 determine and agree the objectives for establishing the brand
  - P3 establish the target market for the brand
  - P4 review any existing brands in the market to identify potential competitor brands
  - P5 interpret research to establish the meaning of the brand and its values and promise

#### Establish brand identity

- You must be able to:*
- P6 confirm the aims, objectives and purpose of the brand
  - P7 confirm the audience and target market for the brand
  - P8 set out the main characteristics that the brand is intended to communicate
  - P9 establish the benefits of the products and/or services to be associated with the brand
  - P10 contribute to the selection of a name and/or design for the brand that communicates the agreed characteristics, is appropriate for the target market and in line with the objectives and purpose of the brand
  - P11 ensure that the name and/or design does not infringe existing brands and can be registered and protected if required
  - P12 contribute to the development and publishing of brand guidelines
  - P13 if necessary, register and protect and defend the brand name and/or design

# CFAMAR13

## Develop brand strategy

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### Knowledge and understanding

*You need to know and understand:*

#### Establish brand purpose

- K1 current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to branding
- K2 branding principles and methods
- K3 the issues to consider when deciding whether to brand products and services
- K4 how to establish a target market for a brand

#### Establish brand identity

*You need to know and understand:*

- K5 the role of brand identity in marketing products and services
- K6 how the brand is affected by other existing brands
- K7 characteristics that make up a brand and how to ensure that they are integrated
- K8 brand attributes that can deliver benefits to the consumer
- K9 the issues to consider when selecting a brand name and/or design
- K10 the purpose of registering and protecting a brand name and/or design and how to do this
- K11 the potential consequences of infringing existing brands
- K12 the content of brand guidelines and how to develop them

# CFAMAR13

## Develop brand strategy

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR13
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations

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## Overview

This standard is about managing brand identity. It includes gathering information on factors that affect customers' perceptions of a brand, adjusting brand image in line with feedback, managing negative feedback from customers and developing plans to promote the brand in line with the organisation's marketing strategy. It also includes protecting the brand by ensuring brand guidelines are followed and monitoring the success of the brand against agreed criteria. It is for marketing professionals who manage brand identity.

# CFAMAR14

## Manage brand identity

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### Performance criteria

#### Influence customer perceptions

- You must be able to:*
- P1 gather information on factors likely to affect customer perceptions of the proposed brand
  - P2 assess the validity and reliability of the information
  - P3 adjust the brand image based on feedback from customers and key stakeholders
  - P4 promote the communication of the brand image to customers
  - P5 monitor the promotion of the brand image and identify strengths and weaknesses of the image
  - P6 adapt promotional activities in line with the brand image's strengths and weaknesses
  - P7 manage negative feedback from customers

#### Demonstrate brand identity

- You must be able to:*
- P8 identify the actions required to demonstrate the brand characteristics
  - P9 present brand characteristics to key stakeholders
  - P10 develop a plan to promote the brand in line with the organisation's marketing strategy
  - P11 promote trial brand to customers and other key stakeholders for feedback
  - P12 amend branding in light of feedback where appropriate
  - P13 project and monitor a consistent brand image
  - P14 maintain the desired brand positioning to maximise return on investment
  - P15 protect the brand, ensuring that brand guidelines are followed
  - P16 monitor the success of the brand against agreed criteria
  - P17 ensure that the outcomes of brand monitoring inform future brand development

# CFAMAR14

## Manage brand identity

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### **Knowledge and understanding**

*You need to know and understand:*

### **Influence customer perceptions**

- K1 current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to brand identity
- K2 sources of information on customer perceptions
- K3 how to assess the validity and reliability of information
- K4 the differences between customer demands, expectations, satisfaction and loyalty
- K5 methods for promoting the characteristics of a brand and their advantages and disadvantages

### **Demonstrate brand identity**

*You need to know and understand:*

- K6 branding principles and methods
- K7 the role of branding identity in marketing products and services
- K8 the contents of brand guidelines and their role in protecting the brand
- K9 methods for monitoring the success of a brand against agreed criteria
- K10 ways in which the outcomes of brand monitoring can inform future brand development

# CFAMAR14

## Manage brand identity

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR14
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations

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## Overview

This standard is about managing brand and corporate reputation. It includes promoting brand awareness, ensuring that all staff understand the importance of behaving in ways that are consistent with brand characteristics and values, taking action to manage feedback on the brand and ensuring that business continuity plans reflect the need to manage the brand and protect the organisation's reputation. It is for marketing professionals who manage brand and corporate reputation.

# CFAMAR15

## Manage brand and corporate reputation

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### Performance criteria

- You must be able to:*
- P1 promote awareness of the brand, communicating the brand characteristics and values internally and externally
  - P2 ensure that all staff understand the brand characteristics and values and the importance of behaving in ways that are consistent with these
  - P3 assess the risks to the brand and corporate reputation and how these will be mitigated
  - P4 ensure that business continuity plans take account of the need to manage the brand and protect the reputation of the organisation
  - P5 track and gather valid and reliable information on perceptions of the current or proposed brand
  - P6 take appropriate action to manage feedback on the brand
  - P7 amend branding in light of feedback where appropriate

# CFAMAR15

## Manage brand and corporate reputation

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### Knowledge and understanding

*You need to know and understand:*

- K1 current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to branding
- K2 methods for promoting the characteristics of a brand and their advantages and disadvantages
- K3 how to ensure that all staff understand why their behaviour needs to be consistent with brand characteristics and values
- K4 how to assess the risks to the brand and corporate reputation
- K5 ways of mitigating risks to the brand and corporate reputation and the circumstances in which these are appropriate
- K6 sources of valid and reliable information on perceptions of the brand
- K7 how to track perceptions of the brand

# CFAMAR15

## Manage brand and corporate reputation

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<b>Developed by</b>	Skills CFA
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<b>Version number</b>	1
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<b>Date approved</b>	January 2013
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<b>Indicative review date</b>	January 2016
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating organisation</b>	Skills CFA
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<b>Original URN</b>	CFAMAR15
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<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
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<b>Suite</b>	Marketing (2013)
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<b>Key words</b>	Marketing, marketing management, market research, public relations
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## Overview

This standard is about developing a marketing plan for the implementation of marketing activities. It includes taking account of information from a marketing audit, where this is appropriate, confirming marketing objectives and the agreed budget for marketing activities, agreeing the overall approach to carrying out marketing activities and producing a plan which contains all necessary elements. It also includes establishing the criteria by which the success of the plan will be evaluated and appropriate monitoring procedures. It is for marketing professionals who develop marketing plans.

# CFAMAR16

## Develop a marketing plan

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### Performance criteria

- You must be able to:*
- P1 where appropriate, take account of information from a marketing audit
  - P2 confirm the marketing objectives as set out in the agreed marketing strategy
  - P3 confirm the agreed budget for marketing activity
  - P4 identify and confirm the needs and characteristics of target customers
  - P5 agree the overall approach to carrying out marketing activities
  - P6 evaluate potential marketing methods, taking account of the target market and the budget
  - P7 assess the risks to the marketing plan and how these might be mitigated
  - P8 determine the actions and resources required to implement the marketing plan
  - P9 establish the criteria by which the plan will be evaluated
  - P10 seek advice and guidance from recognised sources of expertise
  - P11 produce a marketing plan that identifies the required methods, actions, resources, timescales, budget and criteria
  - P12 establish monitoring procedures that will provide information for evaluation
  - P13 consult with key stakeholders, making appropriate amendments in line with feedback
  - P14 agree the marketing plan with decision-makers

# CFAMAR16

## Develop a marketing plan

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### Knowledge and understanding

*You need to know and understand:*

- K1 current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to marketing
- K2 the content of marketing audits and how to make use of this information
- K3 the organisation's existing and target customer base and their needs and expectations
- K4 potential marketing methods and how to select the most appropriate for the target market and agreed objectives
- K5 the types of risk to the marketing plan and how these might be mitigated
- K6 how to determine actions and resources required to meet given marketing objectives
- K7 sources of expertise that can provide advice and guidance
- K8 the topics to be included in a marketing plan
- K9 how to develop monitoring arrangements that will provide information that can be evaluated

# CFAMAR16

## Develop a marketing plan

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**Developed by** Skills CFA

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**Version number** 2

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**Date approved** January 2013

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**Indicative review date** January 2016

---

**Validity** Current

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**Status** Original

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**Originating organisation** Skills CFA

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**Original URN** CFAMAR16

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**Relevant occupations** 1132 Marketing & Sales Manager  
3543 Marketing Associate

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**Suite** Marketing (2013)

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**Key words** Marketing, marketing management, market research

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**Overview**

This standard is about researching the behaviours and motivations of customers and using the outcomes to identify market segments. It includes identification of distinct clusters of customers based on their motivations, attitudes and behaviours, identifying measurable market segments and evaluating their potential stability, accessibility and profitability. It is for marketing professionals who identify market segments.

# CFAMAR17

## Identify market segments

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### Performance criteria

- You must be able to:*
- P1 conduct research to identify the motivations, attitudes and behaviours of customers
  - P2 identify distinct clusters of customers based on motivations, attitudes and behaviours
  - P3 profile established clusters, identifying their distinguishing characteristics
  - P4 identify market segments that are measurable in terms of size, buying power and profile
  - P5 propose test plans for market segments
  - P6 test ideas for market segments in line with the test plan
  - P7 assess the viability of identified market segments, evaluating their potential profitability, stability and accessibility
  - P8 make recommendations on target segments that are likely to achieve the required returns on investment for the organisation
  - P9 consult key stakeholders on recommendations and make appropriate amendments in line with feedback

# CFAMAR17

## Identify market segments

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### Knowledge and understanding

*You need to know and understand:*

- K1 legal, regulatory and ethical requirements that impact on marketing
- K2 the value of market segmentation when developing marketing strategy
- K3 what constitutes a market segment and how this differs from customer classification
- K4 characteristics that might be relevant to establishing potential market segments
- K5 how to conduct research into customer motivations, attitudes and behaviours from which valid and reliable conclusions can be drawn
- K6 the factors that make market segments distinct and the reasons for determining distinctive segments
- K7 how to develop test plans
- K8 factors to consider in assessing the viability of identified market segments
- K9 how to forecast potential returns on investment for target market segments
- K10 mechanisms for consultation with key stakeholders

## CFAMAR17

### Identify market segments

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR17
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, marketing management, market research, public relations

# CFAMAR18

## Implement an organisation's marketing plan



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### Overview

This standard is about implementing an organisation's marketing plan. It includes identifying necessary resources, taking responsibility for the delivery of the plan, making necessary adjustments in line with the marketing strategy and identifying good practice and areas for improvement. It is for marketing professionals who implement marketing plans.

## CFAMAR18

### Implement an organisation's marketing plan

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#### Performance criteria

- You must be able to:*
- P1 identify the human, physical and financial resources needed to implement the marketing plan, and how to obtain them
  - P2 identify the key stakeholders in the implementation process and gain their commitment
  - P3 take responsibility for the delivery of the marketing plan, steering and influencing the implementation process as appropriate
  - P4 make appropriate adjustments to the marketing plan that are consistent with the organisation's overall marketing strategy
  - P5 keep key stakeholders informed of adjustments to the marketing plan and the impact on their activities
  - P6 identify marketing good practice and areas for improvement and communicate these to key stakeholders
  - P7 monitor the plan and make appropriate adjustments in line with organisational needs

## CFAMAR18

### Implement an organisation's marketing plan

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#### Knowledge and understanding

*You need to know and understand:*

- K1 legal, regulatory and ethical requirements relating to marketing and to the organisation's sector
- K2 the organisation's structure and business processes
- K3 how to identify key stakeholders and the human, physical and financial resources needed to implement the marketing plan
- K4 how to influence implementation of the marketing plan with key stakeholders
- K5 how to identify and make appropriate adjustments to the marketing plan
- K6 sources of information on good practice in marketing
- K7 methods of monitoring the plan and the circumstances in which it is appropriate to make adjustments

## CFAMAR18

### Implement an organisation's marketing plan

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR18
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, marketing management, market research, public relations

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**Overview**

This standard is about developing new products and/or services. It includes agreeing a strategy in line with the organisation's overall marketing strategy and objectives, generating ideas for new products and/or services, testing ideas and developing business cases for new products and/or services. It is for marketing professionals who are involved in the development of new products and/or services.

## CFAMAR19

### Develop new products and/or services

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#### Performance criteria

- You must be able to:*
- P1 agree a new product and/or service strategy that is in line with the overall marketing strategy and objectives
  - P2 generate ideas for new products and/or services and identify those that have most potential to meet customer needs and business needs
  - P3 propose market test plans for products and/or services
  - P4 test ideas for new products and/or services in line with the test plan
  - P5 assess the market and profit potential of the new product and/or service
  - P6 assess the nature of potential threats posed by competitors
  - P7 prepare a business case, including a risk assessment, justifying recommendations for the development of the new product and/or service
  - P8 consult with key stakeholders on the business case and take account of feedback
  - P9 present the business case to decision-makers

## CFAMAR19

### Develop new products and/or services

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#### Knowledge and understanding

*You need to know and understand:*

- K1 legal, regulatory and ethical requirements that relate to the development of new products and/or services
- K2 the content of a new product and/or service strategy
- K3 sources of ideas for potential new products and/or services
- K4 methods for identifying customer behaviour and customer business needs
- K5 how to develop test plans
- K6 the advantages and disadvantages of different types of market trials
- K7 methods for identifying and analysing competitor activity
- K8 forecasting techniques and how to apply them in exploring the potential for new products and/or services
- K9 how to prepare a valid business case and risk assessment
- K10 methods of consultation with key stakeholders

## CFAMAR19

### Develop new products and/or services

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR19
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, marketing management, market research, public relations

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**Overview**

This standard is about developing and implementing a pricing policy for an organisation's products and/or services. It includes determining the pricing policy in line with the marketing strategy and objectives and taking account of all relevant factors, monitoring the effectiveness of the policy and making justified recommendations for change. It is for marketing professionals who develop and implement pricing policy.

#### Performance criteria

*You must be able to:*

- P1 determine a pricing policy for products and/or services in line with the overall marketing strategy and objectives
- P2 ensure that the pricing policy takes account of all relevant internal and external factors
- P3 agree the pricing policy with key stakeholders
- P4 monitor and evaluate the effectiveness of the pricing policy against agreed criteria
- P5 assess the potential impact of pricing changes on key stakeholders and the organisation
- P6 propose changes to the pricing policy, making justified recommendations for the need to increase or decrease price

#### Knowledge and understanding

*You need to know and understand:*

- K1 legal, regulatory and ethical requirements that may impact on the pricing of an organisation's products and/or services
- K2 the principal types of pricing policy and their strengths and weaknesses
- K3 the principal approaches to pricing products and/or services
- K4 internal and external factors that need to be taken into account when developing pricing policies
- K5 the types of cost involved and how these can impact on pricing policy
- K6 methods of monitoring pricing policy
- K7 the effects of price policy changes on key stakeholders and the organisation and how to assess the potential impact of price policy change

## CFAMAR20

### Develop and implement pricing policy

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<b>Developed by</b>	Skills CFA
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<b>Version number</b>	2
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<b>Date approved</b>	January 2013
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<b>Indicative review date</b>	January 2016
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating organisation</b>	Skills CFA
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<b>Original URN</b>	CFAMAR20
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<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
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<b>Suite</b>	Marketing (2013)
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<b>Key words</b>	Marketing, sales, marketing management, market research, public relations
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## Overview

This standard is about supporting the identification of distribution channels in order to make an organisation's products and/or services available to its customers. It includes determining the organisation's objectives for its channel(s) and any potential constraints, analysing target customer requirements from a channel, evaluating available channels of distribution and identifying those most appropriate to achieving marketing objectives. It is for marketing professionals who support the identification of distribution channels.

### Performance criteria

- You must be able to:*
- P1 determine the organisation's objectives for its channel(s) of distribution and any associated constraints
  - P2 identify the distribution options available, in line with the marketing strategy and objectives
  - P3 identify the intermediaries that might be required and their responsibilities
  - P4 analyse target customer requirements from a distribution channel
  - P5 assess the potential distribution channels, taking into account likely return on investment, costs/benefits and risks
  - P6 identify ways of mitigating potential risks
  - P7 set out the preferred options for distribution channels, justifying the recommendations made
  - P8 seek feedback from key stakeholders on recommendations and make appropriate amendment

### Knowledge and understanding

*You need to know and understand:*

- K1 legal, regulatory and ethical requirements that relate to the distribution of products and/or services
- K2 the role of distribution in fulfilling an organisation's marketing objectives
- K3 the principal types of distribution channel, their strengths, weaknesses and potential risks
- K4 ways of mitigating potential risk and the circumstances in which these are appropriate
- K5 the types of intermediary involved in distribution and their potential roles
- K6 methods of analysing customer requirements from a distribution channel
- K7 the factors to be considered when assessing distribution channels
- K8 mechanisms for consultation with key stakeholders

## CFAMAR21

### Support the identification of distribution channels

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR21
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, sales, marketing management, market research, public relations

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**Overview**

This standard is about managing a portfolio of products and/or services in order to maintain competitiveness. It includes collecting and analysing performance data to identify trends and returns on investment, assessing the market share for a product and/or service and the stage of the product lifecycle that a particular product has reached, assessing the options and making reasoned recommendations for the management of the portfolio. It is for marketing professionals who manage product and/or service portfolios.

#### Performance criteria

- You must be able to:*
- P1 collect performance data for products and/or services
  - P2 analyse performance data to identify trends and returns on investment made
  - P3 assess the market share of products and/or services and identify associated trends
  - P4 assess the stage of the product lifecycle that the product has reached
  - P5 review the distribution channel and pricing policy
  - P6 forecast potential future sales growth and market share
  - P7 assess the options and present reasoned recommendations for the management of the portfolio
  - P8 agree the preferred options for managing the portfolio with key stakeholders, including budget and actions
  - P9 implement the agreed options for the management of the portfolio
  - P10 agree the criteria against which success can be measured
  - P11 monitor and evaluate the performance of products and/or services against agreed criteria
  - P12 monitor and assess the impact of competitor activity and take appropriate action

### Knowledge and understanding

*You need to know and understand:*

- K1 legal, regulatory and ethical requirements that relate to the management of products and/or services
- K2 methods of collecting and analysing performance data and identifying trends and returns on investment
- K3 the product lifecycle and how to judge which stage a product has reached
- K4 techniques for forecasting sales growth, returns on investment and market share
- K5 factors to consider when reviewing distribution channel and pricing policy
- K6 different strategies for managing a portfolio and the circumstances in which these might be preferred
- K7 how to monitor and evaluate performance of products and services against agreed criteria
- K8 how to monitor and assess competitor activity and its potential impact
- K9 types of action that may be necessary to mitigate the impact of competitor activity and the circumstances in which particular action would be appropriate

## CFAMAR22

### Manage the product and/or service portfolio

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**Developed by** Skills CFA

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**Version number** 2

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**Date approved** January 2013

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**Indicative review date** January 2016

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**Validity** Current

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**Status** Original

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**Originating organisation** Skills CFA

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**Original URN** CFAMAR22

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**Relevant occupations** 1132 Marketing & Sales Manager  
3543 Marketing Associate

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**Suite** Marketing (2013)

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**Key words** Marketing, sales, marketing management, market research, public relations

CFAMAR23

## Develop a strategy and plan for marketing campaigns or activities



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### Overview

This standard is about producing a strategy and plan for a particular marketing campaign or activity. It includes establishing objectives that are consistent with the organisation's overall marketing strategy and plan and setting out a realistic budget and identifying resources to deliver a campaign or activity. It also includes producing a strategy and plan to achieve the objectives and agreeing it with decision-makers. It is for marketing professionals who develop strategies and plans for marketing campaigns/activities.

## CFAMAR23

### Develop a strategy and plan for marketing campaigns or activities

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#### Performance criteria

- You must be able to:*
- P1 set objectives that are consistent with the organisation's marketing strategy and plan
  - P2 identify the customer/audience segments at which the campaign or activity is aimed
  - P3 evaluate the trends and behaviour patterns of the target customers/audience and their implications for the campaign or activity
  - P4 set out a realistic budget and identify necessary resources to deliver the campaign or activity
  - P5 assess the strengths and weaknesses of different approaches to achieving the objectives, taking account of potential returns on investment
  - P6 forecast demand and identify contingency plans to deal with variations from the forecast
  - P7 seek advice and guidance from recognised sources of expertise
  - P8 produce a strategy and plan to achieve the objectives, appropriate to the target market
  - P9 set out key performance measures and methods for monitoring and reporting outcomes against the objectives
  - P10 consult with key stakeholders on the strategy and plan, making appropriate amendments in line with feedback
  - P11 agree the strategy and plan with decision-makers

## CFAMAR23

### Develop a strategy and plan for marketing campaigns or activities

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#### Knowledge and understanding

*You need to know and understand:*

- K1 current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to marketing
- K2 the organisation's existing and potential customer base and their needs and expectations
- K3 how to develop objectives in line with the organisation's overall marketing strategy and plan
- K4 how to identify customer/audience segments
- K5 how to assess strengths and weaknesses of different approaches to achieving the objectives, taking into account the potential returns on investment
- K6 methods of forecasting demand
- K7 how customer trends and behaviour patterns can affect campaigns and activities
- K8 how to develop contingency plans that are capable of addressing variances from forecasts
- K9 sources of expertise that can provide advice and guidance
- K10 how to develop key performance measures and monitoring and reporting arrangements

## CFAMAR23

Develop a strategy and plan for marketing campaigns or activities

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<b>Developed by</b>	Skills CFA
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<b>Version number</b>	2
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<b>Date approved</b>	January 2013
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<b>Indicative review date</b>	January 2016
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating organisation</b>	Skills CFA
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<b>Original URN</b>	CFAMAR23
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<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
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<b>Suite</b>	Marketing (2013)
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<b>Key words</b>	Marketing, sales, marketing management, market research
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CFAMAR24

Develop the creative content for a marketing campaign or activity



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## Overview

This standard is about developing creative marketing content that will appeal to the target audience and is in line with legal, regulatory and ethical requirements. It includes confirming the objectives, budget and timescales for the campaign or activity and the needs and characteristics of target customers. It also includes generating creative marketing ideas that meet the requirements of the campaign or activity. It is for marketing professionals who generate creative content for marketing campaigns or activities, working alone or as part of a team.

## CFAMAR24

### Develop the creative content for a marketing campaign or activity

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#### Performance criteria

- You must be able to:*
- P1 confirm the marketing objectives as set out in the agreed strategy and/or marketing plan
  - P2 confirm the agreed budget and timescale for the development of the creative content
  - P3 confirm the needs and characteristics of target customers
  - P4 confirm the key messages that need to be conveyed
  - P5 confirm the evaluation criteria for the creative content
  - P6 where appropriate work with others to stimulate creative ideas
  - P7 generate creative marketing ideas that will meet the requirements of the campaign or activity
  - P8 test and evaluate the ideas to identify those that appeal to target customers
  - P9 ensure that ideas meet legal, regulatory and ethical requirements

### Knowledge and understanding

*You need to know and understand:*

- K1 current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to the creative content of marketing campaigns/activities
- K2 the organisation's existing and potential customer base and their needs and expectations
- K3 popular culture and social trends
- K4 how to work with others in a creative context
- K5 techniques that can be used to generate creative ideas and how to make best use of them
- K6 how to generate ideas that will differentiate the organisation and its products and/or services from those of its competitors
- K7 how to test and evaluate creative ideas
- K8 how to develop ideas which are innovative, distinctive and memorable and will meet the requirements of the campaign or activity

## CFAMAR24

Develop the creative content for a marketing campaign or activity

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**Developed by** Skills CFA

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**Version number** 1

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**Date approved** January 2013

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**Indicative review date** January 2016

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**Validity** Current

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**Status** Original

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**Originating organisation** Skills CFA

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**Original URN** CFAMAR24

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**Relevant occupations** 1132 Marketing & Sales Manager  
3543 Marketing Associate

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**Suite** Marketing (2013)

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**Key words** Marketing, sales, marketing management, market research

# CFAMAR25

## Implement marketing campaigns or activities



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### Overview

This standard is about implementing marketing campaigns or activities in line with an agreed strategy and plan. It includes confirming the availability of necessary resources and personnel and briefing those involved in their roles and responsibilities. It also covers developing and agreeing appropriate marketing materials, delivering the campaign or activity, addressing variances and recording and reporting on outcomes. It is for marketing professionals who implement marketing campaigns or activities.

#### Performance criteria

- You must be able to:*
- P1 confirm the availability of necessary resources and personnel
  - P2 brief personnel on their roles and responsibilities in line with the campaign or activity strategy and plan
  - P3 develop and agree appropriate marketing materials in line with the campaign or activity strategy and plan
  - P4 deliver the requirements of the campaign or activity strategy and plan within budget and timescale
  - P5 where appropriate, manage responses from customers in line with agreed organisational processes and procedures
  - P6 monitor marketing activities against the agreed campaign or activity strategy and plan and budget
  - P7 address variances in accordance with the campaign or activity strategy and plan
  - P8 update key stakeholders with progress, developments and other issues on a regular basis
  - P9 record and report on the outcomes of the campaign or activities in line with organisational processes and procedures

#### Knowledge and understanding

*You need to know and understand:*

- K1 current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to marketing
- K2 marketing methods appropriate to the particular marketing campaign or activity
- K3 the purpose of ensuring that personnel understand their roles and responsibilities within a particular campaign or activity
- K4 types of marketing materials and how to produce them
- K5 how to monitor activities against the strategy and plan and budget
- K6 the types of risk and variance that can occur and how to address these
- K7 methods of recording and reporting outcomes

## CFAMAR25

### Implement marketing campaigns or activities

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR25
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, sales, marketing management, market research, public relations

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## Overview

This standard is about forecasting and reviewing marketing performance. It includes forecasting and determining the indicators and metrics against which the success of marketing activities will be measured and agreeing the key points at which marketing activity should be monitored. It also includes collecting valid, reliable and comprehensive data, analysing reasons for variations in performance and taking appropriate action to address them. It is for marketing professionals who forecast and review marketing performance.

**Performance  
criteria**

- You must be able to:*
- P1 determine and forecast the indicators and metrics against which the success of marketing activities can be measured
  - P2 agree the indicators, metrics and forecast with key stakeholders
  - P3 assess the likely impact of external factors on marketing performance
  - P4 ensure that the selected indicators and metrics are appropriate to the specific marketing outcomes to be monitored
  - P5 determine and agree timescales and/or key points at which marketing activity should be monitored
  - P6 collect valid, reliable and comprehensive data, including feedback from key stakeholders
  - P7 review marketing outcomes using agreed indicators and metrics
  - P8 analyse reasons for any variations in performance and take appropriate action to address them
  - P9 identify lessons to inform future work

### Knowledge and understanding

*You need to know and understand:*

- K1 current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to marketing
- K2 the range of indicators and metrics against which the success of marketing activities can be measured
- K3 methods of forecasting
- K4 political, environmental, social, technological, legal and economic factors that may impact on marketing performance
- K5 how to ensure that the indicators and metrics selected are fit for purpose
- K6 how to determine the timescales and/or key points at which marketing activity should be monitored
- K7 sources of valid and reliable data
- K8 how to apply indicators and metrics to review marketing outcomes
- K9 the range of actions that might be taken to address variations in performance
- K10 the circumstances in which particular actions to address variations in performance might be taken

## CFAMAR26

### Forecast and review marketing performance

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	January 2013
<b>Indicative review date</b>	January 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Skills CFA
<b>Original URN</b>	CFAMAR26
<b>Relevant occupations</b>	1132 Marketing & Sales Manager 3543 Marketing Associate
<b>Suite</b>	Marketing (2013)
<b>Key words</b>	Marketing, marketing management, market research, public relations

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**Overview**

This standard is about evaluating the performance of marketing activities. It includes establishing and agreeing an evaluation framework, methodology and resources, collecting valid, reliable and comprehensive data and evaluating qualitative and quantitative data. It also includes assessing the impact of marketing activities against agreed targets and measures and reporting on the findings of the evaluation. It is for marketing professionals who evaluate the performance of marketing activities.

### Performance criteria

*You must be able to:*

- P1 determine the indicators and metrics against which the success of marketing activities can be evaluated
- P2 agree specific, realistic and measurable targets and measures with key stakeholders
- P3 establish an evaluation framework and agree it with key stakeholders
- P4 agree the most appropriate evaluation methodology and associated resources with key stakeholders
- P5 collect valid, reliable and comprehensive data, including feedback from key stakeholders
- P6 use agreed methods to evaluate quantitative and qualitative data against agreed targets and measures
- P7 identify the reasons for variances in performance against expectations
- P8 assess the impact of marketing activities and outcomes against agreed targets and measures
- P9 evaluate the quality, cost-effectiveness and cost-efficiency of the marketing activity against agreed targets and measures
- P10 report on the findings of the evaluation in the agreed format
- P11 take appropriate action based on the evaluation results

### Knowledge and understanding

*You need to know and understand:*

- K1 current legal, regulatory and ethical requirements, codes of practice and organisational policies and procedures relating to marketing
- K2 the range of indicators and metrics against which the success of marketing activities can be evaluated
- K3 the content of an evaluation framework and how to develop this
- K4 methods that can be used for evaluation and how to select those that are best suited to the particular circumstances
- K5 sources of valid and reliable data
- K6 how to apply evaluation methods
- K7 how to use evaluation evidence to make decisions on appropriate action

## CFAMAR27

### Evaluate the performance of marketing activities

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**Developed by** Skills CFA

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**Version number** 2

---

**Date approved** January 2013

---

**Indicative review date** January 2016

---

**Validity** Current

---

**Status** Original

---

**Originating organisation** Skills CFA

---

**Original URN** CFAMAR27

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**Relevant occupations** 1132 Marketing & Sales Manager  
3543 Marketing Associate

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**Suite** Marketing (2013)

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**Key words** Marketing, marketing management, market research, public relations