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### Overview

This unit is about establishing and managing the Marketing and Customer Service process to meet organisational and business objectives. You will need to develop and implement a Marketing process that helps promote new business and opportunities to improve branding, corporate image and market share. You will also need to demonstrate how you have contributed to the identification of new products or services and how these have been established to meet market needs and business objectives. Managing the Customer Service strategy is a key role at this level; you will need to demonstrate how you have contributed to the development of policy, systems and processes to meet customer expectations and improve customer satisfaction.

**Performance criteria**

*You must be able to:*

**Identify and resource the development of new products and services to meet market needs**

- P1 review **the organisations operations** and evaluate its **strengths and weaknesses** to compete in potential markets
- P2 identify appropriate and realistic market areas for the organisation and summarise the information accurately
- P3 **analyse** the demand for and type of new **products and services** within the identified market areas
- P4 identify opportunities to use new technologies, materials and techniques to meet identified market needs
- P5 ensure that the **resources** needed are calculated accurately and that sufficient **resources** are allocated for the development of new **products and services**
- P6 negotiate additional **resources** in cases where existing **resources** are insufficient to meet development costs
- P7 select new and innovative **products and services** for development which are based on an accurate evaluation of the organisations business policy

**Develop and implement a marketing strategy**

*You must be able to:*

- P8 evaluate the **present image and reputation of the organisation** with the target audience and identify the potential client base
- P9 develop an **information gathering system** to support the development of **marketing and promotion** strategies
- P10 identify and agree **potential new business opportunities**
- P11 evaluate **marketing and promotion** options and develop a clear and relevant strategy which is capable of making a significant impact on the target audience
- P12 choose methods, media and techniques for the **marketing and promotion** of the organisation which are consistent with the corporate image
- P13 negotiate, agree and implement a programme and budget to deliver the agreed **marketing and promotion** strategy
- P14 **monitor** the **marketing and promotion** strategy regularly, review the impact and make modifications which will improve market presence and penetration

**Develop and maintain a policy to maximise client and customer satisfaction**

*You must be able to:*

- P15 summarise and analyse appropriate market research and assessing realistically the type and quality of services **clients and customers** will need
- P16 develop a clear and realistic **client and customer service policy**, justify it and agree it with decision makers
- P17 develop a **policy** for **client and customer service** which summarises the organisations agreed **policy** and circulate it to all the workforce

**Performance  
criteria**

- P18 develop and introduce an appropriate **client and customer service** system, which will meet the service needs
- P19 develop and introduce systems for obtaining **client and customer** feedback and monitor them regularly for both positive and negative feedback
- P20 summarise positive **client and customer** feedback and circulating it to decision makers
- P21 summarise and investigate negative **client and customer** feedback, respond to individual complaints promptly and resolve cases
- P22 produce regular summaries of **client and customer** complaints, the action taken and recommendations for future action and circulate the summaries to decision makers

## Knowledge and understanding

*You need to know and understand:*

### Identify and resource the development of new products and services to meet market needs

- K1 how to review **the organisation's operations** (analysis)
- K2 what to identify as appropriate and realistic market areas for the organisation (understanding)
- K3 how to summarise information about appropriate and realistic market areas for the organisation (application)
- K4 how and why to evaluate the organisation's **strengths and weaknesses** to compete in potential markets (evaluation)
- K5 what to identify as opportunities to use new technologies, materials and techniques to meet identified market needs (understanding)
- K6 how and why to **analyse** the demand for and type of new **products and services** within the identified market areas (analysis)
- K7 how and why to select new and innovative **products and services** for development (evaluation)
- K8 how to ensure that the **resources** needed are calculated and that they are allocated for the development of new **products and services** (application)
- K9 how and why to negotiate additional **resources** where existing **resources** are insufficient to meet development costs (synthesis)

### Develop and implement a marketing strategy

*You need to know and understand:*

- K10 what to identify as the potential client base (understanding)
- K11 how and why to evaluate the **present image and reputation of the organisation** with the target audience (evaluation)
- K12 how to implement a programme and budget to deliver the agreed **marketing and promotion** strategy (application)
- K13 how to make modifications to the **marketing and promotion** strategy which will improve market presence and penetration (application)
- K14 how and why to develop an **information gathering system** to support the development of **marketing and promotion** strategies (synthesis)
- K15 how and why to develop a clear and relevant **marketing and promotion** strategy (synthesis)
- K16 how and why to negotiate a programme and budget to deliver the agreed **marketing and promotion** strategy (synthesis)
- K17 how and why to evaluate **marketing and promotion** options (evaluation)
- K18 how and why to choose methods, media and techniques for the **marketing and promotion** of the organisation (evaluation)

**Knowledge and understanding**

- K19 how and why to agree a programme and budget to deliver the agreed **marketing and promotion** strategy (evaluation)
- K20 what to identify as **potential new business opportunities** (understanding)
- K21 how and why to agree **potential new business opportunities** (applications)
- K22 how and why to **monitor** and review the impact of the **marketing and promotion** strategy (analysis)

**Develop and maintain a policy to maximise client and customer satisfaction**

*You need to know and understand:*

- K23 how to summarise appropriate market research (application)
- K24 how to summarise positive **client and customer** feedback and circulate it to decision makers (application)
- K25 how to summarise negative **client and customer** feedback and respond to individual complaints (application)
- K26 how to produce and circulate regular summaries of **client and customer** complaints, the action taken and recommendations for future action (application)
- K27 how and why to analyse appropriate market research and assess the type and quality of services **clients and customers** will need (analysis)
- K28 how and why to monitor systems for obtaining **client and customer** feedback (analysis)
- K29 how and why to develop and introduce systems for obtaining **client and customer** feedback (synthesis)
- K30 how and why to investigate negative **client and customer** feedback and respond to individual complains (analysis)
- K31 how and why to resolve complaints (synthesis)
- K32 how to circulate policies for a **client and customer service** to the workforce (application)
- K33 how and why to develop a **client and customer service policy** (synthesis)
- K34 how and why to develop a **policy** for a **client and customer service** (synthesis)
- K35 how and why to develop and introduce an appropriate **client and customer service** system (synthesis)
- K36 how and why to justify and agree a **client and customer service policy** (evaluation)

**Scope/range**

**Identify and resource the development of new products and services to meet market needs**

- 1 The organisation's operations:
  - 1.1 new and innovative services, products and processes (benefits and features)
  - 1.2 customer requirements
  - 1.3 communications with potential customers and partners
  - 1.4 legal requirements and statutory legislation
  - 1.5 past and future negotiations
  - 1.6 specifications
  - 1.7 pricing strategy
  - 1.8 recording systems
  - 1.9 time schedules
  - 1.10 quality
  - 1.11 identification of competitors
  - 1.12 target markets
  - 1.13 training
- 2 Strengths and weaknesses:
  - 2.1 market share
  - 2.2 scope of products and services
  - 2.3 availability of resources
  - 2.4 working practices
  - 2.5 productivity
  - 2.6 profitability and cost factors
  - 2.7 corporate values
  - 2.8 environmental impact
  - 2.9 socio-econometric factors
  - 2.10 ability to innovate
  - 2.11 efficiency of systems (including information technology)
  - 2.12 product life-cycle
  - 2.13 understanding of clients needs
  - 2.14 standardisation
  - 2.15 competence of staff

**Scope/range**

- 3 Analysing - methods:
  - 3.1 feasibility studies
  - 3.2 SWOT (strengths, weaknesses, opportunities and threats) analyses
- 4 Products and services:
  - 4.1 design
  - 4.2 finance
  - 4.3 build
  - 4.4 operate
  - 4.5 research, development and innovation
  - 4.6 technological
  - 4.7 consultation
  - 4.8 advisory
  - 4.9 project management
- 5 Resources:
  - 5.1 people (knowledge, training, competence)
  - 5.2 plant and equipment
  - 5.3 materials
  - 5.4 sub-contractors and suppliers
  - 5.5 partners
  - 5.6 external services
  - 5.7 financial resources
  - 5.8 accommodation

**Develop and implement a marketing strategy**

- 6 Present image and reputation of the organisation:
  - 6.1 market share
  - 6.2 scope of products and services
  - 6.3 availability of resources
  - 6.4 working practices
  - 6.5 productivity
  - 6.6 profitability and cost factors
  - 6.7 corporate values
  - 6.8 environmental impact

**Scope/range**

- 6.9 socio-econometric factors
- 7 Information gathering system:
  - 7.1 organisation sources
  - 7.2 external sources
  - 7.3 customer feedback
  - 7.4 specialists
  - 7.5 market research
- 8 Marketing and promotion:
  - 8.1 branding/corporate image
  - 8.2 corporate image
  - 8.3 sponsorship
  - 8.4 publications
  - 8.5 samples
  - 8.6 relation with press and media
  - 8.7 advertising policies
  - 8.8 direct and indirect client and customer relations
  - 8.9 presentations
  - 8.10 e-commerce
  - 8.11 delivery
- 9 Potential new business opportunities:
  - 9.1 products and services
  - 9.2 developments and projects
  - 9.3 customers and markets
- 10 Monitoring:
  - 10.1 market share
  - 10.2 levels of resource allocation
  - 10.3 profitability
  - 10.4 reputation
  - 10.5 image

**Develop and maintain a policy to maximise client and customer satisfaction**

- 11 Clients and customers:
  - 11.1 individuals



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**Scope/range**

- 11.2 external organisations
- 11.3 departments or teams
- 12 Client and customer service:
  - 12.1 quality
  - 12.2 timescales
  - 12.3 cost
  - 12.4 communication and involvement in decision making
  - 12.5 conduct
  - 12.6 pre-contract
  - 12.7 post-contract
  - 12.8 after care
- 13 Policy:
  - 13.1 relationships with clients
  - 13.2 statutory rights and the organisational response
  - 13.3 operational expectations and performance
  - 13.4 policy regarding adherence to current norms of business ethics and practice
  - 13.5 environmental concerns



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Manage marketing and customer service



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