



Unit D8X3 04 (518)

Plan How to Improve Your Sales and Marketing

Unit Summary

You need to investigate how you sell and market your products and services to improve your sales and marketing. This information will help you to prepare plans that will aim to improve your profits. The detail of what you need to look at will depend on your type of business and the sort of customers you sell to. You also need to look at what your competitors are doing and think about ways to win more business. Information you might need to be able to plan how to improve your sales and marketing could include: market research reports; sales and gross margin targets; surveys of current customers; and surveys of possible new customers. When you have planned how to improve your sales and marketing you will probably have: a marketing plan; and a sales plan.

In order to be assessed as competent you must demonstrate to your assessor that you can consistently perform to the requirements set out below. Your performance evidence must include at least one observation by your assessor.

Achievement of this Unit will provide you with opportunities to develop the following SQA Core Skills:

Communication Intermediate 2

- ◆ Read, understand and evaluate written communication.
- ◆ Produce well structured written communication.

Numeracy Intermediate 2

- ◆ Apply a wide range of numerical skills in everyday and generalised contexts.
- ◆ Interpret and communicate graphical information in everyday and generalised contexts.

Problem Solving Intermediate 2

- ◆ Analyse a situation or issue.
- ◆ Plan, organise and complete a task.
- ◆ Review and evaluate a problem solving activity.

I have completed the requirements of this Unit.

Candidate name: _____ **Date:** _____

Candidate signature: _____ **Date:** _____

I can confirm the candidate has completed all requirements of this Unit.

Assessor signature: _____ **Date:** _____

IV signature: _____ **Date:** _____

Assessment centre: _____

You must be able to	Evidence Requirements	Evidence/ Activity Ref No.
<p>1 Find out about the market for the business's products and services</p> <p>This means you:</p> <ul style="list-style-type: none"> (a) Research the market for the business using information about your sales and published information. (b) Decide if you need to find out any further information yourself and work out how you will do it. (c) Identify which part of the market, and which kind of customer, needs the business's products or services. (d) Find out how your competitors' activities affect the business. (e) Decide if your research has shown that there are opportunities to develop new products or services. (f) Review what you have found and match it with the targets you have set for the business. 	<p>Evidence of finding out about the market for the business's products and services in accordance with workplace procedures.</p>	
<p>2 Plan your marketing</p> <p>This means you:</p> <ul style="list-style-type: none"> (a) Decide what you hope to achieve through marketing and match this to the targets you have set for the business. (b) Prepare forecasts for marketing and work out the costs of marketing activities. (c) Decide a reasonable time to reach the marketing targets. (d) Prepare a detailed budget for marketing and decide what the benefits to the business will be. (e) Decide how you will deal with things which do not go according to your plan. 		

		Evidence Requirements (cont)	
2 (cont)	(f) Use your findings to produce your marketing plan and include all the information to show how you have reached your decisions.		
3	<p>Plan your sales</p> <p>This means you:</p> <ul style="list-style-type: none"> (a) Make sure that your targets for sales match the targets you have set for the business. (b) Write a sales plan based on your investigation of the market and include the sales methods you will use. (c) Decide a reasonable time to reach the sales targets. (d) Prepare a detailed budget for sales and look at what effect achieving the sales targets will have on the business. (e) Produce a complete sales plan and include all the information to show how you have reached your decisions. 	Evidence of planning your sales in accordance with workplace procedures.	

Evidence of Performance

Evidence of performance may employ examples of the following assessment:

- ◆ the candidate's reflective account of performance
- ◆ professional discussion (candidates discuss with their assessor how their evidence meets the standards and the discussion is recorded as part of the evidence)
- ◆ recorded oral and written questioning
- ◆ naturally occurring products (eg these could include — business plans, e-mails, letters, faxes, personal notes and action plans)
- ◆ evidence from relevant, independent and authoritative experts such as business advisors, business mentors, accountants, solicitors or bank staff
- ◆ evidence from prior experience and learning that clearly matches the requirements of the standards

Candidate name:		Assessor initials/date
No	Activity	
1		
2		
3		

You need to know and understand		Evidence
Assessment of knowledge and understanding should wherever possible be carried out during performance to ensure that theory and practice are linked. Candidates should not be required to demonstrate knowledge and understanding more than once. If the same knowledge and understanding is required for different Units candidate should be able to use the same evidence and not be required to duplicate evidence.		
Information about the market for your products or services		
K1	Where you can get published information and how much it will cost you to get it.	
K2	How you can find out about what your customers want.	
K3	How many products and services you are selling and who you are selling to.	
K4	How you can find out about what your competitors are doing.	
Investigating the market		
K5	How the market and your products and services is divided up (segmented). The market could be segmented by: <ul style="list-style-type: none"> ◆ age ◆ occupation or social class, which is often linked to income (for example, professional, working-class or single-parent family) ◆ life style or image (for example, caring, sophisticated or adventurous); buying habits (for example, always plans carefully, size of order or amount of customer loyalty); local neighbourhood or wider regions (for example, international, northern, southern or by postcode) ◆ benefits (for example, benefits provided by a café might be a quick snack, a rest during shopping, somewhere to meet, or a takeaway) 	
K6	How to access what the market for your products or services is, taking into account the following things: <ul style="list-style-type: none"> ◆ the price of the product or service ◆ promoting the product or service to customers ◆ the product or service itself ◆ what your customers' needs are ◆ what market trends there are which will affect the business 	
Setting targets for your market		
K7	How to set targets for marketing which will include considering: <ul style="list-style-type: none"> ◆ your position in the market ◆ sales and gross margins ◆ profits and profit margins ◆ cash flow ◆ products or services ◆ competitor activity ◆ fashion and customer trends ◆ the image of the business ◆ using resources ◆ changes in technology 	

You need to know and understand (cont)		
<i>Producing a market plan</i>		
K8	<p>What you should include in a marketing plan:</p> <ul style="list-style-type: none"> ◆ what the market is ◆ what customers need and want ◆ your forecasts for the business ◆ what type of marketing you will use (eg advertising, sending publicity materials direct to customers, selling to customers face to face, or public relations) ◆ how much the marketing will cost ◆ what the products or services are (eg name, size, quality, design and packaging) ◆ what the price of products or services should be (eg, discounts, credit terms, special offers and alongside competition from other similar products or services) ◆ who will be involved in marketing (eg you, your staff or outside agencies) ◆ how and where products or services are to be sold (eg wholesale, in shops, mail order or through the Internet) 	
<i>Setting targets for sales</i>		
K9	<p>How to set targets for sales which will include:</p> <ul style="list-style-type: none"> ◆ sales volume ◆ profit margins ◆ cash flow ◆ providing customer service ◆ getting repeat business ◆ product and service quality ◆ whether clients can get credit 	
<i>Producing a sales plan</i>		
K10	<p>What you should include in a sales plan:</p> <ul style="list-style-type: none"> ◆ what the market is ◆ what customers need and want ◆ the number of sales you aim to achieve and what the profit margin target is ◆ who will be involved in selling (eg current staff or new staff) ◆ forecasting sales by product or service and by each salesperson ◆ how and where products or services are sold (eg wholesale, in shops, mail order or through the Internet) ◆ what the cost of selling is ◆ how sales will contribute to business success 	
<i>Marketing and sales performance</i>		
K11	How to judge whether or not you are meeting sales and marketing targets.	
K12	How to include some flexibility in judging success, to take account of what actually happens.	
K13	How to set up the business to make sure that you can get information about sales and marketing easily.	
K14	How to identify the points at which business differs from the plan (eg higher or lower sales figures, more or less demand from customers).	

Notes/Comments

Assessor signature: _____ **Date:** _____