

SQA Advanced Unit specification

General information for centres

Unit title: Marketing Analysis and Planning (SCQF level 8)

Unit code: HT3E 48

Superclass: BA

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Source: Scottish Qualifications Authority

Version: 02

Unit purpose

The purpose of this unit is to further develop the learner's knowledge and understanding of marketing analysis and planning for an organisation.

This unit will give the learner knowledge and understanding of how to carry out a full situation analysis of the organisation's position. Learners will further develop their knowledge and understanding of marketing planning, including analysing relevant information that informs the decision-making process and how to develop a marketing plan. Learners will develop knowledge and understanding of how to monitor, measure and adapt the marketing plan for continuous improvement.

Outcomes

On successful completion of the unit the learner will be able to:

1. Analyse the internal marketing situation of an organisation.
2. Analyse the external marketing situation of an organisation.
3. Create a marketing plan for an organisation.

Credit points and level

1 SQA Credit at SCQF level 8: (8 SCQF credit points at SCQF level 8)

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Recommended entry to the unit

Entry to this unit is at the discretion of centres. However, it is expected that learners will have already some understanding of marketing planning, eg achieved the SQA Advanced unit *Marketing Planning: An Introduction* (HP0A 47) at SCQF level 7 or equivalent.

Core skills

Achievement of this Unit gives automatic certification of the following:

Complete Core Skill	None
Core Skill component	Critical Thinking at SCQF level 6 Planning & Organising at SCQF level 6

Opportunities to develop aspects of Core Skills are highlighted in the Support Notes for this Unit specification.

Context for delivery

If this unit is delivered as part of a group award, it is recommended that it should be taught and assessed within the subject area of the group award to which it contributes.

The Assessment Support Pack (ASP) for this unit provides assessment and marking guidelines that exemplify the national standard for achievement. It is a valid, reliable and practicable assessment. Centres wishing to develop their own assessments should refer to the ASP to ensure a comparable standard. A list of existing ASPs is available to download from SQA's website.

Equality and inclusion

This unit specification has been designed to ensure that there are no unnecessary barriers to learning or assessment. The individual needs of learners should be taken into account when planning learning experiences, selecting assessment methods or considering alternative evidence.

Further advice can be found on our website.

SQA Advanced Unit specification: statement of standards

Unit title: Marketing Analysis and Planning (SCQF level 8)

Acceptable performance in this unit will be the satisfactory achievement of the standards set out in this part of the unit specification. All sections of the statement of standards are mandatory and cannot be altered without reference to SQA.

Outcome 1

Analyse the internal marketing situation of an organisation.

Knowledge and/or skills

- ◆ Sales and market share
- ◆ Objectives
- ◆ Gap analysis
- ◆ Effectiveness of existing marketing strategies

Outcome 2

Analyse the external marketing situation of an organisation.

Knowledge and/or skills

- ◆ Segmentation
- ◆ Portfolio analysis
- ◆ Market and product life cycle
- ◆ Competitive advantage
- ◆ Positioning

Outcome 3

Create a marketing plan for an organisation.

Knowledge and/or skills

- ◆ SWOT
- ◆ Marketing objectives
- ◆ Target market
- ◆ Marketing mix
- ◆ Methods for monitoring and control of a marketing plan

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Evidence requirements for this unit

The evidence requirements for this unit will take two forms:

- ◆ evidence of cognitive competence (knowledge and understanding) for Outcomes 1, 2 and 3
- ◆ evidence of practical competence (practical abilities) for Outcomes 1, 2 and 3.

Learners will need to provide evidence to demonstrate their knowledge and/or skills across all outcomes by showing that they can:

For Outcome 1:

Carry out an analysis of the internal factors influencing marketing performance and effectiveness of an organisation. Learners are to:

- ◆ analyse the organisation's sales figures and market share
- ◆ evaluate current marketing objectives
- ◆ produce and explain a gap analysis
- ◆ analyse the effectiveness of the existing marketing strategies

For Outcome 2:

Carry out an analysis of the external factors influencing the marketing situations of an organisation. This must include the following techniques:

- ◆ segmentation
- ◆ portfolio analysis
- ◆ market and product life cycle
- ◆ competitive advantage
- ◆ product positioning

For Outcome 3:

Evaluate information and then use it to inform the decision-making process by creating a marketing plan for an organisation which takes account of the information and analysis derived from the other outcomes. Learners are to:

- ◆ produce a SWOT analysis
- ◆ create SMART marketing objectives
- ◆ explain proposed target audience
- ◆ explain and outline marketing mix decisions
- ◆ detail methods for monitoring and control of the marketing plan

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SQA Advanced Unit specification: support notes

Unit support notes are offered as guidance and are not mandatory.

While the exact time allocated to this unit is at the discretion of the centre, the notional design length is 40 hours.

Guidance on the content and context for this unit

This unit, at SCQF level 8, is a stand-alone unit and is also included the SQA Advanced Diploma in Marketing framework — and in addition may also be offered as part of other related SQA Advanced programmes.

It is designed to enhance knowledge of marketing planning by providing the learner with the opportunity to put theory into practice — through the analysis of both marketing information and an operational marketing plan. It is therefore expected that learners will already have an understanding of marketing planning before undertaking this unit, eg have achieved SQA Advanced Unit *Marketing Planning: An Introduction* at SCQF level 7 or equivalent.

This unit also gives learners the understanding of the planning process and helps develop their ability to analyse and evaluate information. As part of this process, learners will be required to conduct a market audit, a SWOT analysis and identify key action areas, before proceeding to develop appropriate marketing objectives for an organisation. After this, learners will devise marketing programmes at an operational level to achieve the objectives set. It provides the opportunity for learners to consider the resource implications of their proposals and the monitoring and control of the programme.

This unit also helps provide learners with the skills required to design marketing programmes across a variety of different type of organisations.

Guidance on approaches to delivery of this unit

Group activity in the delivery of this unit can help cement learning and could help reduce any confusion about the task. Working in groups could also help prepare learners for working independently on their individual assessments which are required for this unit.

It is envisaged that an integrated approach to teaching the unit will be adopted whereby learners will appreciate the links that exist between all three outcomes.

To achieve Outcome 1, learners must demonstrate that they understand and are able to use various techniques to analyse an organisation's internal environment. Learners therefore could be given case study examples to allow them to practice evaluating marketing objectives and effectiveness of existing strategies. These could be for well-known organisations or they could use their own centre/college as an example. Learners are to be encouraged to identify the marketing and corporate objectives, as well as the marketing strategies set out by the organisation/centre/college and should then assess the success of these strategies and objectives.

Where learners use their own college or centre, they could:

- ◆ be encouraged to calculate the market share for their centre/college and to think about whether this figure is competitive within the further education (FE) sector.
- ◆ consider course uptake (sales) and assess the centre's/college's success.

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Learners should be encouraged to tackle their case studies in groups as this can enhance peer learning — but assessment is on an individual basis.

To achieve Outcome 2, learners must demonstrate that they understand and are able to use the techniques outlined in the evidence requirements to analyse an organisation's external environment. Learners could therefore continue to work in groups using real-life case studies to apply their analytical skills too. Where learners continue to use the example of the FE sector and their centre/college, they are to be encouraged to carry out situational analysis on FE, using techniques such as Boston Box, Porter's Five Forces, conceptual mapping and market segmentation. This could be learnt as a collaboration during group work in class time — thus giving learners the opportunity to apply these new techniques in a safe group environment before having to apply the techniques when being assessed on an individual basis.

To achieve Outcome 3, learners must demonstrate that they can evaluate information and use it to inform the decision-making process by creating a marketing plan for an organisation. During delivery of this outcome, learners could again continue to work in groups and use real-life case studies such as FE to produce their marketing plan. Groups could be encouraged to produce and present a marketing plan to their classmates in order to participate in peer learning. These activities could again help learners prepare for the production of their own marketing plan for an organisation which is required for this outcome.

Guidance on approaches to assessment of this unit

Evidence can be generated using different types of assessment. The following are suggestions only. There may be other methods that would be more suitable to learners.

Centres are reminded that prior verification of centre-devised assessments would help to ensure that the national standard is being met. Where learners experience a range of assessment methods, this helps them to develop different skills that should be transferable to work or further and higher education.

As outlined earlier, this unit could be delivered with learners working in groups, however assessment is on an individual basis.

Although the outcomes can be assessed independently, it is essential that learners appreciate the sequential nature of the marketing planning process in developing an overall marketing plan for an organisation. It may therefore be more useful if holistic assessment is used such as a single assessment for the unit designed as a project, eg based on case-study materials.

Instruments of assessment for Outcomes 1 and 2 could be in the form of responses to case study materials such as reports or presentations, etc. For Outcome 3, a marketing plan for an organisation must be produced covering all evidence requirements.

Opportunities for e-assessment

E-assessment may be appropriate for some assessments in this unit. By e-assessment we mean assessment which is supported by Information and Communication Technology (ICT), such as e-testing or the use of e-portfolios or social software. Centres which wish to use e-assessment must ensure that the national standard is applied to all learner evidence and that conditions of assessment as specified in the evidence requirements are met, regardless of the mode of gathering evidence. The most up-to-date guidance on the use of e-assessment to support SQA's qualifications is available on the SQA website.

Opportunities for developing core and other essential skills

This Unit has the Critical Thinking and Planning & Organising components of Problem Solving embedded in it.

This means that when learners achieve the Unit, their Core Skills profile will also be updated to show they have achieved Critical Thinking at SCQF level 6 and Planning & Organising at SCQF level 6.

Depending on the teaching, learning and assessment approaches adopted there are opportunities to develop Core Skills as follows:

◆ **Problem Solving: Components Planning and Organising; Critical Thinking; and Review and Evaluation**

Learners will be required to analyse and seek solutions to a range of theoretical and practical problems and issues as they identify specific marketing objectives. Identifying and analysing critically the elements involved in external and internal marketing environments and evaluating the relative significance of each, will provide opportunities to develop elements of planning — including critical thinking and general problem-solving skills to an advanced level.

They have to conduct a market audit, a SWOT analysis and identify key action areas, before proceeding to develop appropriate marketing objectives for an organisation. Learners then produce relevant marketing plans at an operational level for an organisation, detail how they will consider the resource implications and detail how they will monitor and control the plan they have produced.

The ability to analyse and evaluate the potential impact of proposed marketing plans and to comment in detail on the effectiveness of strategies will be critical to underpinning knowledge and understanding.

◆ **Communications: Components Oral Communication and Written Communication**

Across this unit, learners are expected to read and understand complex written information on the marketing planning process, how to analyse both internal and external situations of organisations and how this relates to corporate objectives, organisational strategies, etc. Assessments can include responses to case-study stimulus which could be written or oral and the production of a marketing plan for an organisation — which again could be in written format or as an oral presentation.

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◆ Information and Communication Technology: Components Accessing information and Providing/Creating Information

Within this unit, learners are to access a wide range of information on the analysis and planning required for the production of operational marketing plans for organisation. This will include the use of many on-line sources such as internal and external factors which have implications on an organisation's marketing effectiveness. Learners could also use a range of digital tools to collate and/or present their evidence.

◆ Working with Others: Component Working Co-operatively with Others

Where learners work in groups during the delivery of this unit, they will have the opportunity to use interpersonal skills to recognise and value the roles of other people; take responsibility for their own contribution and help achieve a common goal, eg when tackling case study stimulus; presenting proposals for marketing plans and providing feedback, etc.

As learners progress through this unit, they will acquire skills and knowledge about the marketing analysis and planning process, how it has to meet agreed organisational objectives and fits within corporate planning, etc. They undertake analysis of the internal and external marketing situations of organisations then create a relevant and appropriate marketing plan at an operational level. This will include a SWOT analysis; setting SMART marketing objectives; identification of target audience; outline of marketing mix decisions and resource implications; and details of how they will monitor and control their marketing proposals. All of which could be used to enhance learners' employability prospects.

History of changes to unit

Version	Description of change	Date
02	Core Skills Components Critical Thinking at SCQF level 6 and Planning & Organising at SCQF level 6 embedded.	June 2018

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SQA acknowledges the valuable contribution that Scotland's colleges have made to the development of SQA Advanced Qualifications.

Further information

Call SQA's Customer Contact Centre on 44 (0) 141 500 5030 or 0345 279 1000.

Alternatively, complete our [Centre Feedback Form](#).

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General information for learners

This section will help you decide whether this is the unit for you by explaining what the unit is about, what you should know or be able to do before you start, what you will need to do during the unit and opportunities for further learning and employment.

This unit at SCQF level 8 is a stand-alone unit and also appears in a range of SQA Advanced qualifications, such as Marketing, Advertising and PR. It is for those studying marketing, advertising and PR and would like to work in this type of area (or related area) in the future. Also achievement of this unit could help you with further study of marketing planning at SCQF level 9 or above.

Before undertaking this unit, it would be helpful if you already have an understanding of marketing planning, eg achieved SQA Advanced Unit *Marketing Planning: An Introduction* at SCQF level 7 or equivalent — as this unit is designed to further develop your knowledge and understanding of marketing analysis and planning for an organisation.

As well as understanding the marketing planning process, this unit will help develop your ability to analyse and evaluate relevant marketing information. You will therefore be required to conduct a market audit, a SWOT analysis and identify key action areas, before developing appropriate marketing objectives for an organisation. Then you will devise a marketing plan for an organisation (at an operational level) to achieve the objectives you set; this is to include the methods you will use to monitor and control your marketing plan. On successful completion of the unit, you will be able to:

- ◆ analyse the internal marketing situation of an organisation
- ◆ analyse the external marketing situation of an organisation
- ◆ create a marketing plan for an organisation

Depending on how your centre delivers this unit, you may work on your own or in pairs/groups. The assessments for this unit can take a variety of forms and your tutor will advise as you progress through the unit. But they are likely to be responses to case-study materials then the production of a marketing plan.

This Unit has the Critical Thinking and Planning & Organising components of Problem Solving embedded in it. This means that when you achieve the Unit, your Core Skills profile will also be updated to show you have achieved Critical Thinking at SCQF level 6 and Planning & Organising at SCQF level 6.

Depending on how the unit is delivered and assessed, there may also be opportunities for you to develop Core Skills in *Communication, Problem Solving, Information and Communication Technology (ICT)* and *Working with Others*.