



Unit title	Retention Marketing
SQA code	H8RM 04
SCQF level	8
SCQF credit points	8
SSC ref	N/A

History of changes

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Version number	Date	Description	Authorised by

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Title	Retention Marketing	
Learning Outcomes		Assessment Criteria
The candidate will:		The candidate can:
1	Understand the value of customer data to retention marketing.	1.1 Illustrate the stages of a customer journey. 1.2 Explain the tools used throughout the customer journey to obtain customer data. 1.3 Analyse customer data for characteristics and behavior. 1.4 Explain how data sources are integrated to form a customer profile. 1.5 Explain how data is used to prioritise retention marketing.
2	Understand how organisations achieve positive customer relations.	2.1 Explain how organisations engage with customers with different customer profiles. 2.2 Evaluate methods of communication for good customer relations. 2.3 Evaluate an organisations complaints policy and procedures. 2.4 Review an organisation's crisis management procedures. 2.5 Explain how CRM tools contribute to effective customer relations. 2.6 Explain the role of community in customer relations. 2.7 Explain how feedback is used for positive customer relations.
3	Understand strategies for retention marketing.	3.1 Explain how loyalty is used to retain customers. 3.2 Assess the role of public relations in retention marketing.

Learning Outcomes	Assessment Criteria
The candidate will:	The candidate can:
	<p>3.3 Suggest how to personalise a marketing proposition for different customer profiles.</p> <p>3.4 Analyse the relationship between sales and retention marketing.</p> <p>3.5 Evaluate the retention strategies used by different organisations.</p>

Additional information about the Unit
Unit purpose and aim(s)
<p>This Unit is designed to develop the knowledge, understanding and skills of candidates with regards to retention marketing. Candidates will analyse customer data in order to understand how the organisation can achieve positive customer relations.</p> <p>Candidates will also be required to evaluate strategies used by different organisations to retain customers and suggest ways of how to personalise a marketing proposition for different customer profiles.</p>
Details of the relationship between the Unit and relevant national occupational standards (if appropriate)
N/A
Details of the relationship between the Unit and other standards or curricula (if appropriate)
N/A
Assessment requirements specified by a sector or regulatory body (if appropriate)
N/A

Assessment (evidence) Requirements

Candidates must cover all the Learning Outcomes and Assessment Criteria.

This Unit is designed to assess the skills of candidates in the workplace. Observation of candidate performance can only be carried out on-the-job and should be the preferred source of evidence of competent performance.

Collection of supplementary evidence of performance can be used to further substantiate, support and expand the evidence base for competent performance where this is necessary. This may arise in situations where evidence from direct observation of the candidates on-the-job is deemed insufficient to fully meet the required standards. Supplementary evidence may include:

- ◆ witness testimony
- ◆ questioning
- ◆ professional discussion
- ◆ product and photographic evidence
- ◆ relevant active documentation, reports, presentations
- ◆ other valid evidence which relates directly to candidate performance on-the job

Evidence for this Unit is likely to be presented in the form of a portfolio.

Guidance on Instruments of Assessment

SQA's Guide to Assessment provides further information on appropriate Instruments of Assessment. This guide is designed to provide support for everyone who assesses for SQA qualifications. It looks at the principles of assessment, and brings together information on assessment in general as well as on best practice in assessment. The Guide to Assessment can be downloaded free from SQA's website **www.sqa.org.uk**.