



## Unit D8WM 04 (519)

## Improve Your Sales and Marketing

### Unit Summary

You must sell enough of your products or services to keep the business running. Once you have planned how to sell and market your product or service, you will need to put your plans into practice. This will involve: setting targets for sales and marketing; getting the right materials; working out the costs; keeping staff informed; and monitoring progress. You need a range of information about your sales, customers and debts to improve your sales and marketing that might include: sales and gross margin calculations; staff appraisals; work records; reports from sales staff; sales training materials; client feedback; and business plans. When you have improved your sales and marketing you will probably have: targets for sales and marketing; sales and gross margin records which you can set against budgets; an analysis of how the sales and marketing plans were put into practice; and a statement of sales and marketing performance set against the original targets.

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:*

#### 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>Sell and market your products and services</p> <p>This means you:</p> <p>1 (a) Decide what needs to happen to sell and market your products and services.</p> <p>(b) Decide what the business needs to sell or market products or services.</p> <p>(c) Identify the areas where problems could occur and make sure that you have enough resources to deal with them.</p> <p>(d) Make sure that all the people involved are willing and able to carry out the actions required to sell and market products or services.</p> <p>(e) Monitor the progress of sales and marketing and pass the information on to the right people.</p> <p>(f) Decide how you will check progress against your plan.</p>	<p>Evidence of selling and marketing your products and services in accordance with workplace procedures.</p>	
<p>Make sure that sales and marketing help the business</p> <p>This means you:</p> <p>2 (a) Regularly monitor the progress of sales and marketing against targets.</p> <p>(b) Identify any problems in meeting targets, and take prompt action to deal with them.</p> <p>(c) Check whether people involved are meeting targets within agreed timescales.</p> <p>(d) Assess whether resources are being used effectively.</p> <p>(e) Identify new opportunities and threats, and change plans for sales and marketing as necessary.</p> <p>(f) Monitor progress and regularly review how effective the business is.</p>	<p>Evidence of making sure that sales and marketing help the business in accordance with workplace procedures.</p>	

**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

<b>Candidate name:</b>		<b>Assessor initials/date</b>
<b>No</b>	<b>Activity</b>	
1		
2		

<b>You need to know and understand</b>		<b>Evidence</b>
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 candidates should be able to use the same evidence and not be required to duplicate evidence.		
K1	How to break activities down into actions that can be achieved and measured.	
K2	What the appropriate timescales for the actions are.	
K3	<p>What resources will be needed to put your plans into practice? This could include:</p> <ul style="list-style-type: none"> <li>◆ getting the product or service ready</li> <li>◆ promotion (eg advertising, direct marketing, personal selling or public relations)</li> <li>◆ finance (eg from the business or outside funders)</li> <li>◆ staff (eg space for selling, production and administration)</li> <li>◆ administration and monitoring progress</li> <li>◆ getting products and services to customers (eg using own staff or outside methods)</li> </ul>	
K4	What parts of the action plan are uncertain (eg deadlines, higher or lower sales figures, more or less demand from customers and matching productivity to sales).	
K5	Who needs to understand your plans and know how they are progressing (eg staff involved in sales and marketing, customers, backers or outside advisers).	
K6	How to get the best from sales staff (eg by target setting, pay, bonuses, training, sales and management techniques).	
K7	Who will be involved in putting the action plan into practice?	
K8	What monitoring methods are suitable for sales and marketing targets (eg verbal reports, written reports, briefing sessions or meetings)?	
K9	How progress can be checked (eg through feedback from staff, customers and competitors).	
K10	What problems the action plan could face (eg from inside or outside the business, change in market conditions, problems with materials or finance, staff or competitor activity).	
K11	How to review the effectiveness of resources used (eg people, premises, finance and marketing).	
K12	<p>How to keep up to date with new opportunities and threats, and what they are likely to be. This could include:</p> <ul style="list-style-type: none"> <li>◆ opportunities (eg using new technology, a competitor going out of business, new types of customers, new products or services)</li> <li>◆ threats (eg competition from similar businesses, losing important staff or dealing with increasing costs)</li> </ul>	

Notes/Comments

**Assessor signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_