CAM COMMUNICATION ADVERTISING MARKETING
■ **FOUNDATION** ▬

CAM DIPLOMA IN MARKETING COMMUNICATIONS

The Chartered Institute of Marketing

This syllabus applies for assessments
from December 2013 onwards.

UNITS INCLUDED:
MARKETING AND CONSUMER BEHAVIOUR (20 CREDITS)
ADVERTISING (10 CREDITS)
PUBLIC RELATIONS (10 CREDITS)
DIRECT MARKETING AND SALES PROMOTION (10 CREDITS)
INTEGRATED MEDIA (10 CREDITS)

SYLLABUS UNIT 1 (20 CREDITS)
MARKETING AND CONSUMER BEHAVIOUR

This unit aims to provide candidates with the skills and knowledge necessary in managing marketing communications and brand support activities within organisations. The unit explains the links between communications and marketing and provides knowledge of fundamental theories and techniques of research and consumer behaviour, and their application to marketing communications.

Overarching learning outcomes

On successful completion of this unit, candidates will be able to:

• Explain the role of the marketing plan and communications plan within the context of the organisation's strategy and culture.

• Outline the principles of marketing research, how data can be obtained through both primary and secondary methods and the strengths and weaknesses of qualitative and quantitative approaches.

• Describe the marketing planning process and the links between each stage of the process.

• Explain the role of marketing communications and how the tools of the communications mix can be coordinated effectively.

• Develop marketing communication plans and brand support activities based on an understanding of the salient characteristics of the target audience.

• Explain the importance of developing long term relationships with customers, channel members, agencies and other stakeholders and transfer such knowledge to the development of marketing communication activities.

• Assess various methods of evaluating, measuring and controlling tools in the marketing communications mix.

• Recommend suitable methods to influence the relationships an organisation has with its customers, any marketing channel partners and other stakeholders, using marketing communications.

KNOWLEDGE AND SKILL REQUIREMENTS

Element 1: Marketing principles (weighting 20%)

1.1   Explain the development of marketing as an exchange process, a philosophy of business, and a managerial function, recognising the contribution of marketing as a means of creating customer value and as a form of competition:

• An exchange process.

• A philosophy of business.

• A managerial function.

• Creating customer value.

• A form of competition.

SYLLABUS UNIT 1

MARKETING AND CONSUMER BEHAVIOUR

1.2 Explain the importance of the marketing planning process and where it fits into the corporate or organisational planning framework:

- Developing basic marketing strategies to achieve SMART marketing objectives.
- Understanding how budgets are determined.
- Implementation of tactics.
- Monitoring of timeline progress against schedule.
- Measurement of successful implementation.

1.3 Describe the structure of an outline marketing plan and identify its various components:

- Mission statement and business plan.
- Marketing audit/situational analysis.
- Opportunities/issue analysis.
- Objectives.
- Strategy, tactics and action plan.
- Financial implications.
- Controls.

1.4 Undertake a basic external and internal marketing audit:

- Macro-environmental factors (PESTEL).
- Micro-environmental factors (Mendelow Matrix).
- Internal factors (5Ms – Money, Men, Machines, Materials, Minutes).
- SWOT analysis.

1.5 Explain the importance of objectives and the influences on, and processes for, setting objectives:

- Corporate missions.
- Business objectives.
- Marketing objectives.
- Communications objectives.
- Creative objectives.

1.6 Explain the concept of market segmentation in both consumer and business-to-business markets:

- Segmentation, targeting and positioning.
- Segmentation bases.
- Requisites (must be accessible, identifiable, etc).

1.7 Describe the wide range of tools and techniques available to marketers to satisfy customer requirements and compete effectively:

- Extended marketing mix (Product, Price, Promotion, Place, People, Process and Physical Evidence).
- Product (goods and/or services) quality.
- Branding.
- Communication through all the Ps of the extended marketing mix.
- Value propositions.

1.8 Develop an extended marketing mix to include additional components in appropriate contextual settings:

- Service sector.
- Private sector.
- Public sector.
- Business to consumer (B2C).
- Business to business (B2B).
- Not-for-profit (ie, charities).
- Internet only.

1.9 Explain the concept and importance of branding to customers in relation to the following:

- For identification.
- For differentiation.
- As an experience.
- As a symbol (or reflection) of lifestyle.

1.10 Explain the concept and importance of branding to organisations in relation to the following:

- Building a brand.
- Maintaining a brand.
- Building customer loyalty.
- Ethics and corporate social responsibility.

1.11 Demonstrate an appreciation of the need to monitor and control marketing activities:

- Marketing research and information.
- Primary data collection.

- The importance of key performance indicators (KPIs) and marketing metrics.
- Reports, presentations and dashboards.

Element 2: Basic research principles (weighting 10%)

2.1 Explain the elements of the research planning process:

- The stages of research using the 'marketing research mix' (purpose, population, procedure, publication).
- Research briefings (request for proposal).
- Research proposals.

2.2 Describe the uses, sources, benefits and limitations of secondary data:

- The nature of secondary data.
- Planning desk research.
- Evaluation.
- Recording and reporting sources.

2.3 Explain the different methods by which primary data can be obtained and its uses, benefits and limitations:

- Research instruments.
- Methods of capturing data.
- Interviewing (face to face, telephone).
- Self-completion methods (digital, postal).
- Observation (human and mechanical).

SYLLABUS UNIT 1

MARKETING AND CONSUMER BEHAVIOUR

2.4 Outline the strengths and weaknesses of various qualitative research methods including:
- Depths interviews.
- Focus groups.
- The Delphi technique.
- Observation research.
- Grounded theory.

2.5 Outline the strengths and weaknesses of various quantitative research methods including:
- The omnibus and panel.
- Experimentation (hall tests, placement).
- Databases.
- Spread sheets and survey software.
- Econometrics.
- Test versus control.

Element 3: Communication, advertising and media – the relationship with marketing (weighting 30%)

3.1 Define and explain the purpose of marketing communications in the following situations:
- To acquire new customers.
- To engage customers and stakeholders.
- Launch new products.
- Support brands.
- Maintain (or increase) market share.
- Develop retention levels.

- Encourage customer loyalty.
- Support internal marketing within the organisation.
- To differentiate, remind or reassure, inform and persuade – DRIP.

3.2 Explain the advantages and disadvantages of the different promotional tools and media available:
- Advertising (TV, press, radio, out-of-home, cinema, digital).
- Public relations (media relations, events, web, social media, e-mail).
- Sales promotions (coupons, sampling, special offers, collective buying groups).
- Personal selling (face-to-face, KAM, extranet, click to call back).
- Sponsorship (eg, sports, arts, entertainment, causes).
- Direct/digital marketing (search engine, e-mail, mobile, web, social media, affiliate).

3.3 Explain how the elements of a marketing communications plan link together using an appropriate framework:
- Contents of a plan (APIC, SOSTAC, Marketing Communications Planning Framework).
- The importance of research data.
- How creative objectives are derived from communications objectives.
- Choosing appropriate tools – cost, credibility, communications effectiveness and control.

- Resource needs (human, financial, time, materials and other).
- How plans are developed.
- How success is measured, including web analytics and social media monitoring.

3.4 Explain the tasks of each of the promotional tools within a coordinated marketing communications mix:
- To differentiate.
- To remind or reassure.
- To inform.
- To persuade.

3.5 Review how the effectiveness of promotional tools can be evaluated using marketing research and appropriate criteria:
- Cost, reach, audience.
- Questioning and observation/physiological tests.
- Quantitative and qualitative methods.
- Usability testing.

3.6 Outline the key characteristics associated with the 3Ps of promotional strategy (push, pull and profile):
- Push strategies (via distribution channel, trade promotions).
- Pull strategies (direct to customer, POS).
- Profile strategies (build interest of stakeholders, PR).

3.7 Develop a marketing communications plan using the communications mix to:
- Engage customers and stakeholders.
- Launch new products.
- Support brands.
- Maintain market share.
- Acquire new customers.
- Develop retention levels.
- Encourage customer loyalty.
- Support internal marketing within the organisation.
- Differentiate, remind or reassure, inform and persuade a specific audience – DRIP.

3.8 Explain the main methods used to determine a marketing communications budget:
- Marginal analysis.
- Arbitrary.
- Affordable.
- Objective and task.
- Percentage of sales.
- Competitive parity.

3.9 Discuss the main issues concerning the use of marketing communications in an international and global context:
- Media availability.
- Media consumption.
- Culture.
- Religion.
- Education.
- Literacy.

SYLLABUS UNIT 1

MARKETING AND CONSUMER BEHAVIOUR

3.10 Explain how marketing communications activities, media and campaigns can be evaluated:

- Questioning and observation/ physiological tests.
- Quantitative and qualitative methods.
- Pre-testing and post-testing.
- Tracking studies.
- Audience research (NRS, RAJAR, BARB, Route).

3.11 Explain how marketing communications can be used to support brands in the following situations:

- Awareness building.
- Interest building.
- Loyalty building.

3.12 Identify the different classifications of brands and explain how brand strategy can be developed:

- Line extension.
- Brand stretching.
- Corporate branding.
- Generic.
- Own-label.
- Multi-branding.

Element 4: Consumer behaviour (weighting 30%)

4.1 Demonstrate the fundamental importance of 'customers' to all forms of organisations:

- Services.
- Not-for-profit (ie, charities).
- Third sector.
- Public sector.
- Business-to-business.
- Consumer goods.

4.2 Explain the difference between consumer buyer behaviour and organisational buyer behaviour:

- Emotional versus rational factors.
- Size of purchase.
- Relationships.
- Complexity.
- Involvement.
- Perceived risks.

4.3 Explain the importance of various concepts in helping to understand purchase, usage and disposal of products and services, and how this knowledge helps develop communications strategies:

- Attitudes.
- Perception.

- Motivation.
- Learning.
- Personality.
- Class.
- Culture.
- Sub-culture.

4.4 Explain the importance of communication models in helping to understand how individuals can influence the effectiveness of marketing communications:

- General model (Shannon/Weaver, Schramm).
- Learning hierarchy model (Gagne).
- Dissonance-attribution hierarchy model.
- Low-involvement hierarchy model (Krugman).
- Model of campaign objectives and effects (Rogers and Storey).
- Hierarchy of effects model (McGuire).
- Group development (Tuckman and Jensen).
- Word of mouth (WOM), opinion leaders and opinion formers.

4.5 Describe the following concepts in decision-making and how they influence marketing communications:

- Source credibility.
- Involvement.
- Perceived risk.

4.6 Explain the Decision Making Unit (DMU) in relation to both consumers and organisations:

- Members.
- Similarities.
- Differences.

4.7 Explain the Decision Making Process (DMP) for consumers and organisations:

- Consumer (Engel, Blackwell and Miniard).
- Organisations (Robinson et al.).

4.8 Explain the need for effective internal communications to achieve the following:

- Creating good internal relationships.
- Establishing good customer relationships.
- Maintaining good customer relationships.

Element 5: Channel behaviour (weighting 10%)

5.1 Identify and explain how the communications mix (including digital media) can be applied to different marketing channels and situations in order to achieve marketing objectives:

- Primary, secondary and tertiary industry situations.
- B2C: fast and slow-moving consumer goods.

SYLLABUS UNIT 1

MARKETING AND CONSUMER BEHAVIOUR

- B2B: fast and slow-moving industrial goods.
- Direct versus indirect sales.

5.2 Explain the role of marketing communication activities for use in the marketing channel in order to:

- Attract partners.
- Motivate.
- Maintain trust.
- Resolve conflict.
- Reinforce commitment and build satisfaction.

5.3 Appraise the use of digital channels for distribution and their impact on existing/traditional channels:

- Multi-channel.
- E-commerce.
- M-commerce.
- Dangers of disintermediation.

5.4 Demonstrate an appreciation of the need to monitor and control marketing channel behaviour using the following tools:

- Financial indicators.
- Non-financial indicators.
- Shelf space and facings.

SYLLABUS UNIT 2 (10 CREDITS)

ADVERTISING

This unit aims to provide candidates with knowledge and understanding of the function of advertising within the marketing mix, communications mix and society. This unit also aims to ensure that knowledge and understanding of the process of advertising, advertising planning and measuring effectiveness are in place.

Overarching learning outcomes

On successful completion of this unit candidates will be able to:

- Explain the role and structure of advertising in the marketing mix, the communications mix and society.

- Explain the structure of the advertising industry and be able to identify the relationships between the advertiser, advertising agencies, suppliers (eg, research, production) and media owners.

- Set appropriate advertising objectives, strategies and budgets.

- Plan strategies for creative and media execution.

- Describe the controls on advertising, social acceptability, legal controls and voluntary constraints, and be able to apply them to given advertisements.

- Recommend appropriate methods for measuring the effectiveness of advertising.

KNOWLEDGE AND SKILL REQUIREMENTS

Element 1: The context of advertising (weighting 30%)

1.1 Describe the origins of advertising and the development of the industry:

- Posters.
- Press.
- Cinema.
- Radio.
- TV.
- Impact of digital.

1.2 Explain the role of advertising in relation to:

- Economics.
- Society.
- Creation of demand.
- Mass communication.
- The currency of the brand.

1.3 Explain the relationship between advertising and other elements of the communications mix:

- Public relations.
- Direct marketing.
- Sales promotion.
- Personal selling.

SYLLABUS UNIT 2
ADVERTISING

1.4 Explain the nature of the advertising industry and the relationships between the key players:
- Client.
- Agency.
- Media.

1.5 Describe the structure of communication agencies and suppliers and functions of key personnel:
- Account management.
- Account planning.
- Media planning and buying.
- Creative director, copywriter and art director.
- Production and traffic.

1.6 Assess an organisation's advertising needs and whether internal or external resources are appropriate:
- Advertising requirements.
- Internal resource.
- Variety of agencies.

1.7 Explain the role of marketing research in the planning and evaluation of advertising activities:
- Setting objectives.
- Measuring success.

1.8 Explain how audience research enables the marketer, and their agencies, to better understand consumer behaviour:
- How many are watching?
- Who is watching?
- Segmentation data.
- Frequency.
- Reach.
- Coverage.

1.9 Explain how consumer behaviour can be influenced through the use of advertising:
- Hierarchy of effect model.
- 'Think, feel, do'.

1.10 Outline the different approaches that can be taken to advertising and marketing communications internationally:
- Standardisation.
- Adaptation.
- Localisation.

Element 2: Planning process and techniques (weighting 30%)

2.1 Explain how advertising objectives link to corporate and marketing objectives:
- Five levels of cascading objectives:
- Corporate/business.
- Marketing.
- Marketing communications.
- Advertising.
- Media.

2.2 Explain the process for establishing advertising objectives:
- SMART.
- Hierarchy of effects.
- DAGMAR.
- DRIP.
- Action oriented objectives.

2.3 Outline the principles used for developing an advertising strategy:
- Generic.
- Pre-emptive.
- Unique selling proposition.
- Brand image.
- Positioning.
- Resonance.
- Affective.
- Informational.

2.4 Describe target audiences in consumer profiling terms:
- Demographic.
- Geo-demographic.
- Behavioural.
- Psychographic.

2.5 Write an effective creative brief, and evaluate the contents of a creative proposal:
- Product/brand.
- Role of advertising.
- Target audience.
- Media.
- Single-minded proposition.
- Evaluation.

2.6 Explain the appeals that can be used in advertising:
- Product features.
- Price.
- Fear.
- Humour.
- Sex.

2.7 Explain positioning statements and advertising messages for products/ services based on:
- Needs of target market.
- Differentiators to competition.
- Unique benefits of products/ services.

SYLLABUS UNIT 2
ADVERTISING

2.8 Explain how audiences process advertising messages using relevant models:
- Engel et al model of consumer behaviour.
- Elaboration likelihood model.
- ATR model.

2.9 Produce advertisements for a variety of media:
- Conventional media.
- Digital media.
- Support literature.

2.10 Develop a coordinated advertising campaign:
- Situation.
- Targets.
- Resources.
- Objectives.
- Strategy.
- Tactics.
- Implementation.
- Evaluation and control.

Element 3: Budgets/controls/ measures (weighting 20%)

3.1 Describe the research methods available to pre and post-test advertisements:
- Copy testing.
- Attitude research.

3.2 Describe the research approaches and methods available to measure the effectiveness of advertising campaigns:
- Quantitative and qualitative approaches.
- Focus groups.
- Interviews.
- Postal surveys.
- Telephone surveys.
- Digital surveys.
- Continuous research.
- Syndicated surveys.

3.3 Determine the optimum method of evaluation for any given campaign:
- Attitude change.
- Awareness change.
- Sales.
- Behavioural change.

3.4 Explain the method used to inform and control the development of advertisements:
- Marketing Communications Planning Framework (MCPF).

3.5 Explain how advertising budget levels are determined:
- Arbitrary.
- Affordable.
- Competitive parity.
- Percentage of sales.
- Objective and task.

Element 4: Legal aspects (weighting 20%)

4.1 Explain the main approaches to advertising control:
- Marketing ethics.
- Self-regulation.
- Legislation.

4.2 Explain the justification for both legal and voluntary controls of advertising.

4.3 Describe the legislation and regulation that impinges on advertising:
- Fair Trading Act 1973.
- Race Relations Act 1976.
- Sale of Goods Act 1979.
- Sex Discrimination Act 1986.
- Copyright, Design and Patents Act 1988.
- Tobacco Advertising and Promotions Act 2002.
- Price Marking Order 2004.

4.4 Explain the structure and processes of organisations that implement the regulations and voluntary codes in relation to advertising:
- ASA – Advertising Standards Authority.
- CAP Code – code of non-broadcast advertising, sales promotion and direct marketing.
- BCAP Code for broadcast advertising.
- OFCOM – the communications regulator (UK).
- CLEARCAST – TV Advertising clearance.
- RACC – Radio Advertising clearance.

SYLLABUS UNIT 3 (10 CREDITS)
PUBLIC RELATIONS

The aim of this unit is to provide candidates with an understanding of the role that public relations (PR) play in:

- Developing, enhancing, defending and promoting an organisation's, or an individual's, reputation.

- Supporting employee communications.

- Assisting transactions, commercial or otherwise, of an organisation.

The unit will encourage candidates to assess the range of stakeholder relationships that public relations practitioners need to develop and sustain, and examine the various techniques available, including classic and social media, for transmitting messages.

It will also provide knowledge of the organisational and professional context in which people working full-time in public relations.

Overarching learning outcomes

On successful completion of this unit, candidates will be able to:

- Discuss the various definitions of public relations and the varying ways in which PR is practised in both a consultancy and in-house context.

- Demonstrate the ways in which self-regulation, legal frameworks and professional ethics apply to the practice of PR.

- Analyse a range of contemporary PR techniques and evaluate a range of situations under which they should be applied.

- Explain the various media channels (traditional and digital) available to a PR practitioner and how these channels can be used to communicate effectively with the media.

- Suggest appropriate PR action in relation to specific scenarios, including the ability to define publics, and provide advice on timing and costing for plans.

- Illustrate the relevance of techniques for other allied disciplines, such as psychology, neuroscience and advertising that are being adopted and applied by the modern PR practitioner.

KNOWLEDGE AND SKILL REQUIREMENTS

Element 1: Definitions, concepts and contexts (weighting 20%)

1.1 Explain contemporary definitions of the following:
- PR: CIPR, PRCA, PRSA.
- Reputation.
- Stakeholder management and engagement.
- Social media.
- Propaganda and spin.

1.2 Discuss the role that public relations play in defending and promoting an organisation's reputation:
- Commercial.
- Public sector.
- Not-for-profit.

1.3 Analyse the ways in which PR compliments and interacts with other elements of the communication and marketing mixes in the context of the organisation as a whole:
- Advertising, direct marketing, sales promotion, marketing and research.
- Digital communications.
- CSR.
- Public affairs.
- Employee communications.

1.4 Evaluate the link between PR and branding in terms of both developing and managing a brand:
- Build reputation and credibility.
- Protect brand from attack.
- Manage crises that might damage the brand.
- Reach opinion leaders and opinion formers.
- Encourage online dialogue about the brand.

1.5 Demonstrate an understanding of how market research can assist PR planning:
- Market analysis.
- Benchmarking.
- Techniques for evaluating impact, eg attitude shifts/sentiment.

1.6 Explain using marketing concepts how PR applies in international markets:
- Adaptation.
- Standardisation.
- Localisation.

1.7 Explain the relevance of key marketing concepts to PR:
- Reputation.
- Influence.
- Stakeholder engagement.
- Persuasion.
- Two-way communication.
- Emotional versus rational appeals.

Element 2: Media relations (weighting 20%)

2.1 Explain the media channels available to PR:
- Print.
- Broadcast.
- Digital.

2.2 Discuss how PR practitioners liaise and negotiate with the media in order to maximise coverage:
- Building relationships with the media.
- What to write.
- When to write.

2.3 Prepare standard types of communication used with journalists:
- Media releases.
- Diary notes.
- Feature articles.
- Opinion pieces.
- Topical comment.
- Social media news releases.

SYLLABUS UNIT 3
PUBLIC RELATIONS

2.4 Review techniques used by PR practitioners to secure news and feature items:
- Sell-in.
- Social media.
- Blogs/forums.
- Interviews.
- Briefings.

2.5 Provide an assessment of the core techniques used to prepare individuals for media appearances:
- Background media search.
- Topic assessment.
- Identification of questions.
- Development of narrative.
- Rehearsal.
- Agree tone.

2.6 Recommend ways to measure and evaluate media relations:
- Output, outtake (takeout), outcome.
- Specialist agencies.
- Awareness, attitude, behaviour.
- ROI.
- Advanced media coverage assessment (positive/negative, page, mentions, context).
- Benchmarking/analytics/metrics.
- Sentiment analysis.

Element 3: Specialist areas of PR (weighting 20%)

3.1 Explain the role of employee communications in developing and maintaining positive internal stakeholder relationships leading to business performance:
- Employee engagement.
- Change management.
- Briefings.
- Presentations.
- Intranet.

3.2 Review the context and core techniques of financial PR:
- Analyst relations.
- Financial journalists.
- Financial results (full year and interim).
- Mergers and acquisitions.
- IPOs.

3.3 Explain how PR supports Corporate Social Responsibility (CSR) policies:
- Fit between CSR policy and reputation.
- Writing a CSR policy.
- External communication on CSR.
- Internal communication on CSR.

3.4 Explain contemporary public affairs practice:
- Engaging stakeholders:
- MPs.
- Civil servants.
- Shareholders.
- Customers.
- Clients.
- Trade associations.
- Think tanks.
- Business groups.
- Unions.
- The media.
- Lobbying.
- Issue management.
- CSR information dissemination.
- Influencing public policy.
- Building and maintaining corporate reputation.

3.5 Demonstrate how digital and social media techniques are influencing public relations practice:
- Twitter/Yammer.
- Blogs/forums.
- Facebook/LinkedIn.
- Web.
- SMS/MMS.
- Social media releases.

3.6 Devise a corporate identity programme:
- Elements of visual identity.
- Logo.
- Colour palettes.
- Typeface/font.
- Uniforms.
- Merchandise.
- Corporate identity guidelines.

Element 4: Planning, issues and crises (weighting 20%)

4.1 Explain the elements of a communications audit:
- Objectives.
- Audiences to consider.
- Areas to explore (eg structures, quality of communications, effectiveness of messages).
- Background research.
- Types of interview.
- Style of reporting (eg by theme, department, etc).
- Recommendations.
- Timings.
- Budget.
- Summary.

SYLLABUS UNIT 3
PUBLIC RELATIONS

4.2 Assess the need for the following types of PR activity in an organisation:

- Issues management.
- Crisis management.
- Lobbying.
- Pressure group relationship management.

4.3 Produce outline PR plans in response to the findings of a communications audit:

- Target audience.
- What we want them to do.
- Why we want them to do it.
- Message.
- Rationale.

4.4 Produce outline PR campaigns which include:

- Objectives.
- Tactics.
- Timetable.
- Budget.
- Evaluation recommendations.

Element 5: In-house, consultancy, ethics and regulation (weighting 20%)

5.1 Assess the various structures for organising in-house and consultancy teams in terms of building client relationships:

- Discipline.
- Profit centre.

- Geography.
- Fit with other roles, eg marketing, corporate affairs.

5.2 Explain the role of PR consultancies.

- Creation (for a client) of trust and understanding with:
- Employees.
- Customers.
- Shareholders.
- Investors.
- Government.
- Local community.
- Development of PR plans and campaigns to meet client objectives.

5.3 Assess the advantages and disadvantages of different types of consultancy that can be hired in terms of their suitability for purpose:

- Freelancer/contractor.
- Secondee.
- Sector specialist.
- Independent consultancy.
- Full service (possibly part of wider group).
- International group.

5.4 Explain the process by which a consultancy is appointed:

- Brief.
- Long list.
- Credentials.
- Short list.

- Pitch.
- Evaluation.
- Appointment.
- Legals.
- Agree work plan and methods of evaluation.

5.5 Review the techniques available for developing and maintaining client/ consultancy relationships:

- Briefing.
- In-house surgeries.
- Peer review.
- Regular meetings.
- Less frequent strategic reviews.
- Clear roles and points of contact.
- Pro-active advice.
- Providing wider counsel.

5.6 Evaluate the various ethical frameworks that PR practitioners draw upon:

- Professional codes (eg, CIPR).
- Legal adherence.
- Public barrister principle.
- Guardian of reputation.
- Codes of conduct (eg civil service).

5.7 Explain the legal and self regulatory controls within which PR operates:

- Legal (eg libel, misrepresentation).
- Statutory bodies (PCC/OFCOM).
- Voluntary codes.
- Professional and ethical behaviour.

SYLLABUS UNIT 4 (10 CREDITS)
DIRECT MARKETING AND SALES PROMOTION

This unit aims to provide candidates with an understanding of the disciplines and techniques of direct marketing and sales promotion at an operational level, including the knowledge and the skills to apply database and other digital technologies in the development of direct marketing and sales promotion campaigns, within legal and regulatory constraints. The nature and scope of sales promotion is defined as including merchandising, field marketing and point of sale promotion. The role of all of these disciplines within the marketing function is explored.

Overarching learning outcomes

On successful completion of this unit, candidates will be able to:

- Describe the relationship of direct marketing with other marketing communications tools.

- Explain the roles of sales promotion, merchandising, point of sale and field marketing in the context of various sectors and in terms of consumer, trade and sales force/employee promotions.

- Develop, manage and maintain a marketing database.

- Devise, implement and control appropriate direct marketing and sales promotion campaigns to meet defined objectives.

- Justify and manage tactical budgets for individual campaigns.

- Apply the principles of testing and measurement and financial controls which support direct marketing and sales promotion campaigns.

- Explain the ethical, legal and self-regulatory environment around the disciplines of direct marketing and sales promotion.

KNOWLEDGE AND SKILL REQUIREMENTS

Element 1: The role of direct marketing within a marketing context (weighting 20%)

1.1 Discuss the nature, structure and development of the direct marketing industry:
   - Reasons for the development of direct marketing.
   - Size of the industry.
   - Professional bodies and associations in the direct marketing industry.

1.2 Apply the benefits of direct marketing within diverse business contexts:
   - B2C.
   - B2B.
   - Not-for-profit.

1.3 Explain the relationship between direct marketing and other elements of the marketing and communications mixes:
   - Product and relevance of direct marketing at different stages of PLC.
   - Price – offers, incentives to encourage call to action.
   - Place – e-distribution.
   - Promotion – advertising, public relations, new media, personal selling, sales promotion.

1.4 Identify and explain the various direct marketing media available:
   - Telephone.
   - Mobile marketing.
   - Personalised web pages.
   - E-mail.
   - Direct mail.
   - DRTV.
   - Print-magazines, inserts, and newspapers.
   - Door to door drops.

1.5 Use marketing research to plan, manage and control direct marketing activities more effectively:
   - Descriptive v. comparative v. diagnostic role of information.
   - Qualitative methods – focus groups, depth interviews, observation.
   - Quantitative methods – face to face surveys, telephone interviews, online surveys, omnibus surveys.
   - Concept testing.
   - Profiling customers.
   - Role of testing in the direct marketing process.

1.6 Explain the challenges of direct marketing communications in international markets:
   - Standardisation, adaptation, localisation.
   - Culture – influence of religion, cultural norms, protocols.
   - Language and symbols.
   - Availability and level of technology.
   - Ensuring consistency of key messages.
   - Availability of media.
   - Legal and regulatory constraints.

Element 2: The role of databases in direct marketing (weighting 15%)

2.1 Demonstrate an understanding of the role, application and benefits of databases in relation to direct marketing:
   - Types of data-behavioural, volunteered, attributed.
   - Profiling, segmenting and targeting customers.
   - Personalising communications and offers.
   - Relationship building.

2.2 Identify and explain the different stages in the setting up of a database and how to maintain databases:
   - Identifying needs of users of a database.
   - Software evaluation.

SYLLABUS UNIT 4
DIRECT MARKETING AND SALES PROMOTION

- Processing data – formatting, validation, de-duplication.
- Updating, cleansing and maintaining data.

2.3 Enhance data to serve the purposes of direct marketing:
- Data mining.
- Data warehousing.
- Data marts.
- List brokers.
- Lifestyle databases, eg Acorn, Mosaic.

2.4 Evaluate the use of mailing and e-mailing lists in B2B and B2C direct marketing communications:
- Recency.
- Frequency.
- Preferred contact method.
- Accuracy.
- Contact information.
- Spend per transaction.
- Cost.
- Enquirers v. buyers.

Element 3: The role of sales promotion within a marketing context (weighting 20%)

3.1 Define sales promotion and its role in the marketing mix:
- Short term technique to initiate a defined action.
- Induce trial.

- Encourage brand switching.
- Raise awareness.
- Stimulate demand.
- Reinforcing brand loyalty (loyalty schemes).

3.2 Identify the effect of sales promotion on brands and branding:
- Price promotions can devalue the brand.
- Failure of sales promotion can damage brand equity.
- Sales promotions good for trial.
- Not suitable for brand building if used as a one of tactic but effective if used strategically.

3.3 Evaluate the suitability of techniques for sales promotion in packaged goods, durables and services in retail markets:
- Coupons.
- Secure eVouchers and mobile couponing.
- Rebates.
- Loyalty schemes.
- Samples.
- Free products.
- Premiums.
- Self-liquidating offers.
- Competitions.
- Buying allowances.
- Merchandise allowances.
- Trade v. consumer sales promotions.

3.4 Identify the key issues for consideration when designing merchandising in specific situations:
- Cost.
- Legal and regulatory environment.
- Selection and sourcing of merchandise.
- POS.
- Suitability of/for brands and retail outlets.

3.5 Describe the relationship between organisations operating in the sales promotions market:
- Professional bodies – ASA, ISMM, IPM, CAM.
- Suppliers – benchmarking and evaluating in relation to sourcing of premiums and prizes.
- Types of sales promotion agency.
- Agency selection – short listing criteria, pitching, selection criteria.

3.6 Use marketing research to plan, manage and control sales promotion activities more effectively:
- Descriptive v. comparative v. diagnostic role of information.
- Qualitative methods – focus groups, depth interviews, observation.
- Quantitative methods – face to face surveys, telephone interviews, online surveys, omnibus surveys.
- Concept testing.
- Profiling customers.

3.7 Explain the challenges of sales promotion in international markets:
- Standardisation, adaptation, localisation.
- Culture – influence of religion, cultural norms, protocols.
- Language and symbols.
- Availability and level of technology.
- Ensuring consistency of key messages.
- Availability of media.
- Legal and regulatory constraints.

Element 4: Planning campaigns (weighting 30%)

4.1 Explain the difference between marketing and direct marketing and sales promotion objectives:
- Marketing – profit, sales/revenue, market share, ethical and social responsibility.
- Direct marketing – general, acquisition led, retention led, brand related.
- Sales promotion – trial, short term sales, retention.
- Corporate v. operational.
- SMART objectives – specific, measurable, achievable, realistic, timebound.

4.2 Explain the role of campaign management in delivering objectives:
- Situation analysis – research and insight.

SYLLABUS UNIT 4
DIRECT MARKETING AND SALES PROMOTION

- Objective setting.
- Strategy formulation – what is the big idea? How to develop wining propositions, strategies for new and existing customers.
- Implementing the campaign plan.
- The use of technology to understand the effectiveness of the campaign.
- Role of fulfilment service.
- Budgeting.
- Measurement – key tools and metrics.

4.3 Outline the relative strengths and weaknesses of a range of media options for both direct marketing and sales promotions:

- Broadcast media – TV, radio.
- Print media – newspapers, billboards, magazines.
- Integrated media plans.
- Digital media.

And their:

- Cost.
- Availability.
- Quality of reproduction.
- Targeting.
- Lead times.

4.4 Explain the strengths and weaknesses of creative executions in a range of media:

- Copy-headline, body copy, length.
- Images.

- Layout.
- Role of envelope and letter.
- Originality.
- Skills and techniques of persuasive writing.
- Role of design.

4.5 Describe the nature of customer loyalty explaining the role of CRM in this process:

- Benefits of customer retention.
- Implications of lapsed customers, customer defection.
- Relationship management in B2C and B2B.
- Levels of customer loyalty.
- Role of technology in enhancing/ undermining relationships and effect on retention.
- Components of loyalty schemes.

4.6 Assess the decision to use field marketing and resources required to implement in a variety of different contexts:

- Benefits – face to face contact with targeted customer, complex and comprehensive support, variety of industry knowledge, trained staff supported by computerised reporting systems, flexible.
- Auditing.
- Sampling/demonstrating.
- Merchandising.
- Roadshows, events, experiential marketing.

- Field marketing briefs for audits, events and sampling - client information, activity, objectives, level of conversion rate, POS, frequency of visits, specific training or qualifications, timescale, call file, reporting procedures, distribution.

4.7 Explain how budgets are set for direct marketing and sales promotion campaigns:

- Marginal analysis.
- Arbitrary.
- Affordable.
- Objective and task.
- Percentage of sales.
- Competitive parity.

Element 5: Legal aspects, regulation and codes of practice (weighting 15%)

5.1 Explain how legislative and regulatory environment impact on direct marketing and sales promotion:

- Overview on online legal environment.
- Social media and the law – implications of wikis, blogs, peer 2 peer communications.
- Restrictions on the use and capture of consumer data.
- Ethics.
- Sustainability.
- Spam and privacy.

5.2 Demonstrate an understanding of key UK legislation and European Directives for the control of marketing and the use of intellectual property:

- Data Protection Act 1998.
- Privacy and Electronic Communications Regulations 2003.
- Distance Selling Directive.

5.3 Describe the role of self regulation in the management of direct marketing and sales promotion campaigns:

- The British Code of Advertising, sales promotion and direct marketing.
- Impact on processing of personal information.
- Corrections and suppressions against opt out lists and the deceased register.
- Withdrawal of consent.
- Sales promotion rules that apply eg free offers and trials, prize promotions and the law, trade incentives, charity linked promotions.

SYLLABUS UNIT 5 (10 CREDITS)
INTEGRATED MEDIA

This unit aims to provide candidates with knowledge and understanding of the function of different media within the marketing mix and communications mix. This unit also aims to ensure that knowledge and understanding of the process of media selection, planning and measuring effectiveness are in place.

Overarching learning outcomes

On successful completion of this unit, candidates will be able to:

- Explain the role of different media in the marketing mix and the communications mix, both offline and online.

- Assess the dynamics of the media industry in the context of buying and using media space for advertising.

- Set appropriate objectives and strategies for different media.

- Present an overview of media available and their characteristics, including digital media, and methods of planning and selection.

- Select appropriate methods for measuring the effectiveness of communications media.

KNOWLEDGE AND SKILL REQUIREMENTS

Element 1: Integrated media (weighting 30%)

1.1 Explain integrated marketing communications (IMC) and its role in the achievement of communication and marketing objectives:

- Identify the importance of synergy and harmonisation across and within the range of communication tools.

- Describe the importance of IMC, and its associated benefits including clear, concise communication that will aid:
- The brand.
- The customer.
- The company.

1.2 Define media as distinct from the other tools of marketing communications:

- Media is the vehicle for achieving advertising objectives and strategies, which in turn means that marketing objectives can be met in the first instance.

- Media should help to position brands, define reachable segments and communicate brand values efficiently and consistently.

- Media is the conduit for delivering communications messages to end-users/ target audiences.

1.3 Produce advertising objectives using marketing terms that relate to different types of media and encourage progression through hierarchies of effect, namely:

- AIDA.
- ATR.
- 'Think-feel-do' and 'feel-think-do'.
- Importance of:
- Reach.
- Frequency.
- Weight.
- Cost.
- Continuity.

1.4 Identify and explain the advantages and disadvantages of key media, offline and online, with reference to:

- Cost.
- Credibility.
- Communication effectiveness.
- Control.

1.5 Explain the need to coordinate media in order to maximize the potential effect of media tools:

- Explore how each media format has its own advantages and disadvantages.

- Illustrate how combining different forms of media in a coordinated and planned way, will facilitate the delivery of the message to the intended audience.

1.6 Evaluate different media options particularly with reference to digital over traditional media:

- Advantages and disadvantages of:
- TV.
- Radio.
- Cinema.
- Outdoor.
- Print.
- Digital including display, search and social media.

1.7 Write an integrated media plan including:

- Online marketing communications.
- Offline marketing communications.
- Measurement/evaluation/analytics techniques.

1.8 Explain how international media marketing communications should be planned and managed with reference to:

- Globalisation.
- Regionalisation.
- Centralisation.

1.9 Describe the role of media planning and media buying agencies:

- Plan and schedule where advertisements are placed.
- Delivery of creative and cost-effective media strategies.
- Negotiation with media owners.
- Buying of media.

SYLLABUS UNIT 5
INTEGRATED MEDIA

- Liaison with other agencies.
- Reporting to client.

1.10 Describe the structure of media planning and media buying agencies:
- Planners.
- Buyers.
- Analysts.
- Client services.

Element 2: Planning process and techniques (weighting 30%)

2.1 Assess the strengths and weaknesses of various media in meeting corporate, marketing and marketing communications objectives:
- TV.
- Radio.
- Cinema.
- Outdoor.
- Print.
- Digital: including display, search and social media.

2.2 Explain the key concepts impacting on media planning:
- In-house versus external.
- Cost.
- Control.
- Timing/scheduling.
- Effectiveness.

2.3 Explain the process for establishing media objectives:
- Follow on from clear marketing and then communications objectives.
- Consider target audience(s).

2.4 Detail the process for establishing media strategy:
- Consideration of target audience.
- Consideration of the brand.
- When to advertise (media schedules).
- What media channels to select.
- Key performance indicators (KPIs) – eg share of voice, awareness, online searches, click-through rate, conversion rate.

2.5 Describe target audiences in such a way that they are meaningful for the organisation and practical for media planning purposes, considering:
- Demographics.
- Psychographics.
- Media usage.

2.6 Work with planners/strategists to contribute to the development of positioning statements and advertising messages:
- Role of media in communicating clear messages to consumers about the brand and its position in its marketplace relative to its competitors.
- How media acts as the vehicle to communicate messages to consumers.

- How the media used can be 'the message' itself.

2.7 Identify and explain the different processes and time frames for producing advertisements:
- Conventional media.
- Digital media including display, search and social media.
- Support literature: point of sale, brochures, collateral.

2.8 Structure a media plan:
- Scheduling alternatives (continuity, flight, pulse, etc).

Element 3: Media buying (weighting 30%)

3.1 Explain the attributes and costs of media relevant to making media planning decisions:
- GRPs.
- Added value.
- Suitability for the target audience and the brand.
- The 4 Cs – cost, credibility, communication effectiveness and control.

3.2 Describe the sources of media research:
- BARB.
- NRS.
- RAJAR.
- FAME.

- Digital media planning tools (eg Google Ad Planner), Google Trends, Keyword tools.

3.3 Explain how different media and channels are purchased:
- B2C.
- TV.
- Radio.
- Cinema.
- Outdoor.
- Print.
- Digital.
- B2B.
- TV.
- Radio.
- Cinema.
- Outdoor.
- Print.
- Digital.

3.4 Understanding of various media concepts:
- Reach.
- Frequency and weight.
- Cost.
- Continuity.
- DRIP.
- PULSE.
- Paid search: bid management tools.
- RTB/DSPs for online display advertising.

SYLLABUS UNIT 5
INTEGRATED MEDIA

3.5 Explain the different requirements for broadcast, non-broadcast and digital media:

- Coverage.
- Message life.
- Formats – sight, sound, movement.
- Costs.
- Impact.
- Involvement of audience.
- Transportability.
- Targeting ability.
- Information content.
- Measurement.
- Security.
- Production costs.

Element 4: Budgets/controls/ measures (weighting 10%)

4.1 Describe the research methods available to pre and post-test and measure the effectiveness of different media campaigns:

- Surveys.
- Feedback (websites, coupons).
- Observations.
- Tracking (eg online adverts, click-through rates).
- RAJAR.
- FAME.
- BARB.
- NRS/ABC.

4.2 Determine the optimum methods of evaluation for any given campaign:

- Brand awareness.
- Recall.
- Comprehension.
- Action.
- Sales.
- Attitude change.
- Changes in consumer repertoires.
- Share of voice and share of market.
- Multi-channel attribution models.
- Digital KPIs: eg click-through rate (CTR), unique visitors, conversion to sale.

4.3 Explain how budgets for various media are determined and managed:

- Objective and task.
- Competitive parity.
- Advertising to sales ratio.
- Affordability within budget.