

**REPUBLIC OF KENYA**

**NATIONAL OCCUPATIONAL STANDARDS**

**FOR**

**MARKETING MANAGER**

**LEVEL 6**



TVET CDACC

P.O. BOX 15745-00100

NAIROBI

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**Council Secretary/CEO**

**TVET Curriculum Development, Assessment and Certification Council**

**P.O. Box 15745–00100**

**Nairobi, Kenya**

**Email:** [**info@tvetcdacc.go.ke**](mailto:info@tvetcdacc.go.ke)

# FOREWORD

The provision of quality education and training is fundamental to the Government’s overall strategy for social economic development. Quality education and training will contribute to achievement of Kenya’s development blueprint, Vision 2030 and sustainable development goals.

Reforms in the education sector are necessary for the achievement of Kenya Vision 2030 and meeting the provisions of the Constitution of Kenya 2010. The education sector had to be aligned to the Constitution of Kenya 2010 and this resulted in the formulation of the Policy Framework for Reforming Education and Training (Sessional Paper No. 4 of 2016). A key feature of this policy is the radical change in the design and delivery of the TVET training. This policy document requires that training in TVET be competency based, curriculum development be industry led, certification be based on demonstration of competence and mode of delivery allows for multiple entry and exit in TVET programmes.

These reforms demand that Industry takes a leading role in curriculum development to ensure the curriculum addresses its competence needs. It is against this background that these Occupational Standards were developed for the purpose of developing a competency-based curriculum for Marketing Manager Level 6. These Occupational Standards will also be the basis for assessment of an individual for competence certification.

It is my conviction that these Occupational Standards will play a great role towards development of competent human resource for the Business sector’s growth and development.

**PRINCIPAL SECRETARY, VOCATIONAL AND TECHNICAL TRAINING**

**MINISTRY OF EDUCATION**

# PREFACE

Kenya Vision 2030 aims to transform the country into a newly industrializing, “middle-income country providing a high-quality life to all its citizens by the year 2030”. Kenya intends to create a globally competitive and adaptive human resource base to meet the requirements of a rapidly industrializing economy through life-long education and training. TVET has a responsibility of facilitating the process of inculcating knowledge, skills and attitudes necessary for catapulting the nation to a globally competitive country, hence the paradigm shift to embrace Competency Based Education and Training (CBET).

The Technical and Vocational Education and Training Act No. 29 of 2013 and Sessional Paper No. 14 of 2012 on Reforming Education and Training in Kenya, emphasized the need to reform curriculum development, assessment and certification. This called for a shift to CBET in order to address the mismatch between skills acquired through training and skills needed by industry as well as increase the global competitiveness of Kenyan labor force.

The TVET Curriculum Development, Assessment and Certification Council (TVET CDACC), in conjunction with Business Sector Skills Advisory Committee (SSAC) have developed these Occupational Standards for Marketing Manager Level 6. These standards will be the basis for development of competency-based curriculum for Marketing Management Level 6.

The occupational standards are designed and organized with clear performance criteria for each element of a unit of competency. These standards also outline the required knowledge and skills as well as evidence guide.

I am grateful to the Council Members, Council Secretariat, Business SSAC, expert workers and all those who participated in the development of these Occupational Standards.

**CHAIRPERSON, TVET CDACC**

# 

# ACKNOWLEDGMENT

These Occupational Standards were developed through combined effort of various stakeholders from private and public organizations. I am thankful to the management of these organizations for allowing their staff to participate in this course. I wish to acknowledge the invaluable contribution of industry players who provided inputs towards the development of these Standards.

I thank TVET Curriculum Development, Assessment and Certification Council (TVET CDACC) for providing guidance on the development of these Standards. My gratitude goes to Business Sector Skills Advisory Committee (SSAC) members for their contribution to the development of these Standards. I thank all the individuals and organizations who participated in the validation of these Standards.

My gratitude and appreciation go to all the individuals and organizations who participated in the development of these Standards.

**CHAIRPERSON**

**BUSINESS SECTOR SKILLS ADVISORY COMMITTEE**

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# ABBREVITIATION AND ACRONYMS

A Control version

AIDS Acquired Immunodeficiency Syndrome

BC Basic Competency

BUS Business

CBA Cost Benefit Analysis

CBET Competency Based Education and Training

CC Common Competency

CDACC Curriculum Development Assessment Certification Council

CEO Council Secretary

CPU Central Processing Unit

CR Core Unit

DIME Direct, Indirect, Mix and everything in between

HIV Acquired Immunodeficiency Virus

HR Human Resource

ICT Information Communication Technology

MKT Marketing

NEMA National Environmental Management Authority

OS Occupational Standard

OSH Occupational Safety and Health

PESTEL Political Environmental Social Technological Economic Legal

POSM Point of Sale Material

PPE Personal Protective Equipment

PR Public Relations

ROI Return on Investment

RtM Route to Market

SOPStandard Operating Procedure

SSAC Sector Skills Advisory Committee

SWOT Strength Weakness Opportunity Threat

TVET Technical and Vocational Education and Training

WBS Work Breakdown Structure

# KEY TO UNIT CODE

**BUS/OS/MKT /BC /01/4 A**

Industry or sector

Occupational Standards

Occupational area

Type of competency

Competency number

Competency level

Version control

# COURSE DESCRIPTION

The Marketing Management level 6 qualifications consist of competencies that an individual must achieve to enable him/her to manage marketing strategy, conduct market analysis, develop marketing communication plan, develop marketing budgets, develop trade channel plan, manage customer experience, develop brand strategy, manage marketing projects, manage innovations /renovations and manage digital marketing

The units of competency comprising marketing certificate level 6 qualifications include the basic, common and core units of competency as shown below.

**Basic Units of Competency**

|  |  |
| --- | --- |
| **Unit Code** | **Unit Title** |
| BUS/OS/MKT/BC/1/6/A | Demonstrate Communication Skills |
| BUS/OS/MKT/BC/2/6/A | Demonstrate Numeracy Skills |
| BUS/OS/MKT/BC/3/6/A | Demonstrate Digital Literacy |
| BUS/OS/MKT/BC/4/6/A | Demonstrate Entrepreneurial Skills |
| BUS/OS/MKT/BC/5/6/A | Demonstrate Employability Skills |
| BUS/OS/MKT/BC/6/6/A | Demonstrate Environmental Literacy |
| BUS/OS/MKT/BC/7/6/A |  |

**Common Units of Competency**

|  |  |
| --- | --- |
| **Unit Code** | **Unit Title** |
| BUS/OS/MKT/CC/1/6/A | Manage Business Research and Development |

**Core units of Competency**

|  |  |
| --- | --- |
| **Unit Code** | **Unit Title** |
| BUS/OS/MKT/CR/1/6/A | Manage Marketing Strategy |
| BUS/OS/MKT/CR/2/6/A | Conduct Market Analysis |
| BUS/OS/MKT/CR/3/6/A | Develop Marketing Communication Plan |
| BUS/OS/MKT/CR/4/6/A | Develop Marketing Budgets |
| BUS/OS/MKT/CR/5/6/A | Develop Trade Channel Plan |
| BUS/OS/MKT/CR/6/6/A | Manage Customer Experience |
| BUS/OS/MKT/CR/7/6/A | Develop Brand Strategy |
| BUS/OS/MKT/CR/8/6/A | Manage Marketing Projects |
| BUS/OS/MKT/CR/9/6/A | Manage Innovations /Renovations |
| BUS/OS/MKT/CR/10/6/A | Manage Digital Marketing |

# BASIC UNITS OF COMPETENCY

# DEMONSTRATE COMMUNICATION SKILLS

**UNIT CODE:** BUS/OS/MKT/BC/01/6/A

**UNIT DESCRIPTION**

This unit covers the competencies required to demonstrate communication skills. It involves meeting communication needs of clients and colleagues, developing communication strategies, establishing and maintaining communication pathways, conducting interviews, facilitating group discussion and representing the organization.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the Range*** |
| 1. Meet communication needs of clients and colleagues | 1. Specific communication needs of clients and colleagues are identified and met based on workplace requirements 2. Different communication approaches are identified and applied according to clients’ needs 3. Conflict is identified and addressed as per the standards of the organization |
| 1. Develop communication strategies | * 1. Strategies for effective internal and external dissemination of information are developed as per organization’s requirements   2. Special communication needs are considered in developing strategies according workplace procedures   3. ***Communication strategies*** are analyzed, evaluated and revised based the workplace needs |
| 1. Establish and maintain communication pathways | * 1. Pathways of communication are established as per organization policy   2. Pathways are maintained and reviewed according to organization procedures |
| 1. Promote use of communication strategies | * 1. Information is provided to all areas of the organization as per strategy requirements   2. Effective communication techniques are articulated and modeled according work requirements   3. Personnel are given guidance about adapting communication strategies as per organization procedures |
| 1. Conduct interview | 1. A range of appropriate communication strategies are employed in ***interview situations*** based on the workplace requirements 2. Records of interviews are made and maintained in accordance with organizational procedures 3. Effective questioning, listening and nonverbal communication techniques are used as per needs |
| 1. Facilitate group discussion | 1. Mechanisms to enhance ***effective group interaction*** are identified and implemented according to workplace requirements 2. Strategies to encourage group participation are identified and used as per organizations’ procedures 3. Meetings objectives and agenda are set and followed based on workplace requirements 4. Relevant information is provided and feedback obtained according to set protocols 5. Evaluation of group communication strategies is undertaken in accordance with workplace guidelines 6. Specific communication needs of individuals are identified and addressed as per individual needs |
| 1. Represent the organization | 1. 7Relevant presentation are researched and presented based on internal or external communication forums requirements 2. Presentation is delivered in a clear and sequential manner as per the predetermined time 3. Presentation is made as per appropriate media 4. Difference views are respected based on workplace procedures 5. Written communication is done as per organizational standards 6. Inquiries are responded according to organizational standard |

**RANGE**

This section provides work environment and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **Variable** | **Range** |
| 1. Communication strategies may include but not limited to: | * Language switch * Comprehension check * Repetition * Asking confirmation * Paraphrase * Clarification request * Translation * Restructuring * Approximation * Generalization |
| 1. Effective group interaction may include but not limited to: | * Identifying and evaluating what is occurring within an interaction in a nonjudgmental way * Using active listening * Making decision about appropriate words, behavior * Putting together response which is culturally appropriate * Expressing an individual perspective * Expressing own philosophy, ideology and background and exploring impact with relevance to communication |
| 1. Situations may include but not limited to: | * Establishing rapport * Eliciting facts and information * Facilitating resolution of issues * Developing action plans * Diffusing potentially difficult situations |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Communication
* Active listening
* Interpretation
* Negotiation
* Writing

**Required Knowledge**

The individual needs to demonstrate knowledge of:

* Communication process
* Dynamics of groups
* Styles of group leadership
* Key elements of communications strategy

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical aspects of Competency | Assessment requires evidence that the candidate:   1. Developed communication strategies to meet the organization requirements and applied in the workplace 2. Established and maintained communication pathways for effective communication in the workplace 3. Used communication strategies involving exchanges of complex oral information |
| 1. Resource Implications | The following resources should be provided:   1. Access to relevant workplace or appropriately simulated environment where assessment can take place 2. Materials relevant to the proposed activity or tasks |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   1. Direct observation 2. Oral questioning 3. Written texts |
| 1. Context of Assessment | Competency may be assessed:   1. On-the-job 2. Off-the –job 3. During Industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

# DEMONSTRATE NUMERACY SKILLS

**UNIT CODE:** BUS/OS/MKT/BC/02/6/A

**UNIT DESCRIPTION**

This unit describes the competencies required to demonstrate numeracy skills. It involves; applying a wide range of mathematical calculations for work; applying ratios, rates and proportions to solve problems; estimating, measuring and calculating measurement for work; using detailed maps to plan travel routes for work; using geometry to draw and construct 2D and 3D shapes for work; collecting, organizing and interpreting statistical data; using routine formula and algebraic expressions for work and using common functions of a scientific calculator.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function. | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms*** ***are elaborated in the Range.*** |
| 1. Apply a wide range of mathematical calculations for work | * 1. Mathematical information embedded in a range of workplace tasks and texts is extracted as per workplace procedures.   2. Mathematical information is interpreted and comprehended as per job specifications   3. A range of mathematical and problem solving processes are selected and used as per job specification   4. Different forms of fractions, decimals and percentages are flexibly used as per SOPs   5. Calculation performed with positive and negative numbers as per SOPs   6. Numbers are expressed as powers and roots and are used in calculations as per SOPs   7. Calculations done using routine formulas as per SOPs   8. Estimation and assessment processes are used to check outcome as per workplace procedures   9. Mathematical language is used to discuss and explain the processes, results and implications of the task as per workplace procedures |
| 1. Use and apply ratios, rates and proportions for work | * 1. Information regarding ratios, rates and proportions extracted from a range of workplace tasks and texts as per SOPs   2. Mathematical information related to ratios, rate and proportions is analysed as per SOPs   3. Problem solving processes are used to undertake the task as per workplace procedures   4. Equivalent ratios and rates are simplified as per SOPs   5. Quantities are calculated using ratios, rates and proportions as per SOPS   6. Graphs, charts or tables are constructed to represent ratios, rates and proportions as per SOPs   7. The outcomes reviewed and checked as per job specifications   8. Information is record using mathematical language and symbols as per workplace procedures |
| 1. Estimate, measure and calculate measurement for work | * 1. Measurement information embedded in workplace texts and tasks are extracted and interpreted as per job specifications   2. Appropriate workplace measuring equipment are identified and selected as per job specifications   3. Accurate measurements are estimated and made as per SOPs   4. The area of ***2D shapes*** including compound shapes are calculated as per SOPs   5. The volume of 3D shapes is calculated using relevant formulas as per SOPs   6. Sides of right angled triangles are calculated using Pythagoras’ theorem as per SOPs   7. conversions are perform between units of measurement as per job specification   8. Problem solving processes are used to undertake the task as per workplace Procedures   9. The measurement outcomes are reviewed and checked as per workplace procedures   10. Information is recorded using mathematical language and symbols appropriate for the task as per workplace procedures |
| 1. Use detailed maps to plan travel routes for work | * 1. Different types of maps are identified and interpreted as per job requirements   2. Key features of maps are identified as per job requirements   3. Scales are identified and interpreted as per job requirements   4. Scales are applied to calculate actual distances   5. Positions or locations are determined using directional information as per job requirements   6. Routes are planned by determining directions and calculating distances, speeds and times as per job requirements   7. Information is gathered and identified and relevant factors related to planning a route checked as per job requirements   8. Relevant equipment is select and checked for accuracy and operational effectiveness as per job requirements   9. Task is planned and recorded using specialized mathematical language and symbols appropriate for the task as per job requirements |
| 1. Use geometry to draw 2D shapes and construct 3D shapes for work | * 1. A range of 2D shapes and 3D shapes and their uses in work contexts is identified as per job specifications   2. Features of 2D and 3D shapes are named and described as per job specifications   3. Types of angles in 2D and 3D shapes are identified as per job specifications   4. Angles are drawn, estimated and measured using geometric instruments as per job requirements   5. Angle properties of 2D shapes are named and identified as per SOPs   6. Angle properties are used to evaluate unknown angles in shapes as per SOPs   7. Properties of perpendicular and parallel lines are applied to shapes as per SOPs   8. Understanding and use of symmetry is demonstrated as per SOPs   9. Understanding and use of similarity is demonstrated as per SOPs   10. The workplace tasks and mathematical processes required are identified as per workplace procedures   11. 2D shapes is drawn for work as per job specification   12. 3D shapes is constructed for work as per job specification   13. The outcomes are reviewed and checked as per workplace procedures   14. Specialized mathematical language and symbols appropriate for the task are used as per SOPs |
| 1. Collect, organize, and interpret statistical data for work | * 1. Workplace issue requiring investigation are identified as per workplace procedures   2. Audience / population / sample unit is determined as per workplace procedures as per workplace procedures   3. Data to be collected is identified as per workplace procedures   4. Data collection method is selected as per workplace procedures   5. Appropriate statistical data is collected and organized as per SOPs   6. Data is illustrated in appropriate formats as per SOPs   7. The effectiveness of different types of graphs are compared as per SOPs   8. The summary statistics for collected data is calculated as per SOPs   9. The results / findings are interpreted as per SOPs   10. Data is checked to ensure that it meets the expected results and content as per workplace procedures   11. Information from the results including tables, graphs and summary statistics is extracted and interpreted as per workplace procedure   12. Mathematical language and symbols are used to report results of investigation as per workplace procedure |
| 1. Use routine formula and algebraic expressions for work | * 1. Understanding of informal and symbolic notation, representation and conventions of algebraic expressions is demonstrated as per SOPs   2. Simple algebraic expressions and equations are developed as per job specification   3. Operate on algebraic expressions as per job requirement   4. Algebraic expressions are simplified as per job requirement   5. Substitution into simple routine equations is done as per SOPs   6. Routine formulas used for work tasks are identified and comprehended as per SOPs   7. Routine formulas are evaluate by substitution as per SOPs   8. Routine formulas transposed as per SOPs   9. Appropriate formulas are identified and used for work related tasks as per workplace procedures   10. Outcomes are checked and result of calculation used as per workplace procedures |
| 1. Use common functions of a scientific calculator for work | * 1. Required numerical information to perform tasks is located as per job specification   2. The order of operations and function keys necessary to solve mathematical calculation are determined as per job specification   3. Function keys on a scientific calculator are identified and used as per SOPs   4. Estimations are referred to check reasonableness of problem solving process as per workplace procedures   5. Appropriate mathematical language, symbols and conventions are used to report results as per workplace procedures |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environments and situations that will affect performance.

|  |  |
| --- | --- |
| **Variable** | **Range** |
| 1. 2D shapes may include but not limited may include but not limited to: | * Triangles * Square * Rectangle * Triangle |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Measuring
* Logical thinking
* Computing
* Drawing of graphs
* Applying mathematical formulas
* Analytical

**Required knowledge**

The individual needs to demonstrate knowledge of:

* Types of common shapes
* Differentiation between two dimensional shapes / objects
* Formulae for calculating area and volume
* Types and purpose of measuring instruments
* Units of measurement and abbreviations
* Fundamental operations (addition, subtraction, division, multiplication)
* Rounding techniques
* Types of fractions
* Different types of tables and graphs
* Meaning of graphs, such as increasing, decreasing, and constant value
* Preparation of basic data, tables & graphs

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical aspects of Competency | Assessment requires evidence that the candidate:   1. Developed communication strategies to meet the organization requirements and applied in the workplace 2. Established and maintained communication pathways for effective communication in the workplace 3. Used communication strategies involving exchanges of complex oral information |
| 1. Resource Implications | The following resources should be provided:   1. Access to relevant workplace or appropriately simulated environment where assessment can take place 2. Materials relevant to the proposed activity or tasks |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   1. Observation 2. Oral questioning 3. Written test 4. Portfolio of Evidence 5. Interview 6. Third party report |
| 1. Context of Assessment | Competency may be assessed:   1. On-the-job 2. Off-the –job 3. During Industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**DEMONSTRATE DIGITAL LITERACY**

**UNIT CODE:** ...../OS/…../BC/03/6/A

**UNIT DESCRIPTION**

This unit describes competencies required to demonstrate digital literacy. It involves, identifying computer software and hardware, applying security measures to data, hardware, and software in automated environment, applying computer software in solving task, applying internet and email in communication at workplace, applying desktop publishing in official assignments and preparing presentation packages.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the Range*** |
| 1. Identify appropriate computer software and hardware | * 1. Concepts of ICT are determined in accordance with computer equipment   2. Classifications of computers are determined in accordance with manufacturers specification   3. Appropriate computer software is identified according to manufacturer’s specification   4. Appropriate computer hardware is identified according to manufacturer’s specification   5. Functions and commands of operating system are determined in accordance with manufacturer’s specification |
| 1. Apply security measures to data, hardware, software in automated environment | * 1. ***Data security and privacy are classified*** in accordance with the prevailing technology   2. ***Security threats*** reidentified ***and control measures*** are applied in accordance with laws governing protection of ICT   3. Computer threats and crimes are detected in accordance to Information Management security guidelines   4. Protection against computer crimes is undertaken in accordance with laws governing protection of ICT |
| 1. Apply computer software in solving tasks | * 1. ***Word processing concepts*** are applied in resolving workplace tasks, report writing and documentation as per the job requirements   2. ***Word processing utilities*** are applied in accordance with workplace procedures   3. Worksheet layout is prepared in accordance with work procedures   4. Worksheet is built and data manipulated in the worksheet in accordance with workplace procedures   5. Continuous data manipulated on worksheet is undertaken in accordance with work requirements   6. Database design and manipulation is undertaken in accordance with office procedures   7. Data sorting, indexing, storage, retrieval and security is provided in accordance with workplace procedures |
| 1. Apply internet and email in communication at workplace | * 1. Electronic mail addresses are opened and applied in workplace communication in accordance with office policy   2. Office internet functions are defined and executed in accordance with office procedures   3. ***Network configuration*** is determined in accordance with office operations procedures   4. Official World Wide Web is installed and managed according to workplace procedures |
| 1. Apply Desktop publishing in official assignments | * 1. Desktop publishing functions and tools are identified in accordance with manufactures specifications   2. Desktop publishing tools are developed in accordance with work requirements   3. Desktop publishing tools are applied in accordance with workplace requirements   4. Typeset work is enhanced in accordance with workplace standards |
| 1. Prepare presentation packages | * 1. Types of presentation packages are identified in accordance with office requirements   2. Slides are created and formulated in accordance with workplace procedures   3. Slides are edited and run-in accordance with work procedures   4. Slides and handouts are printed according to work requirements |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environments and situations that will affect performance.

|  |  |
| --- | --- |
| **Variable** | **Range** |
| 1. Appropriate computer hardware may include but not limited to: | Collection of physical parts of a computer system such as:   * Computer case, monitor, keyboard, and mouse * All the parts inside the computer case, such as the hard disk drive, motherboard and video card |
| 1. Data security and privacy may include but not limited to: | * Confidentiality of data * Cloud computing * Integrity -but-curious data surfing |
| 1. Security and control measures may include but not limited to: | * Counter measures against cyber terrorism * Risk reduction * Cyber threat issues * Risk management * Pass-wording |
| 1. Security threats may include but not limited to: | * Cyber terrorism * Hacking |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Analytical skills
* Interpretation
* Typing
* Communication
* Computing (applying fundamental operations such as addition, subtraction, division and multiplication)
* Using calculator
* Basic ICT skills

**Required Knowledge**

The individual needs to demonstrate knowledge of:

* Software concept
* Functions of computer software and hardware
* Data security and privacy
* Computer security threats and control measures
* Technology underlying cyber-attacks and networks
* Cyber terrorism
* Computer crimes
* Detection and protection of computer crimes
* Laws governing protection of ICT
* Word processing;
* Functions and concepts of word processing.
* Documents and tables creation and manipulations
* Mail merging
* Word processing utilities
* Spread sheets;
* Meaning, formulae, function and charts, uses and layout
* Data formulation, manipulation and application to cells
* Database;
* Database design, data manipulation, sorting, indexing, storage retrieval and security
* Desktop publishing;
* Designing and developing desktop publishing tools
* Manipulation of desktop publishing tools
* Enhancement of typeset work and printing documents
* Presentation Packages;
* Types of presentation Packages
* Creating, formulating, running, editing, printing and presenting slides and handouts
* Networking and Internet;
* Computer networking and internet.
* Electronic mail and world wide web
* Emerging trends and issues in ICT;
* Identify and integrate emerging trends and issues in ICT
* Challenges posed by emerging trends and issues

**EVIDENCE** **GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Identified and controlled security threats   2. Detected and protected computer crimes   3. Applied word processing in office tasks   4. Designed, prepared work sheet and applied data to the cells in accordance to workplace procedures   5. Opened electronic mail for office communication as per workplace procedure   6. Installed internet and World Wide Web for office tasks in accordance with office procedures   7. Integrated emerging issues in computer ICT applications   8. Applied laws governing protection of ICT |
| 1. Resource Implications | The following resources should be provided:   * 1. Access to relevant workplace where assessment can take place   2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Observation   2. Oral questioning   3. Written test   4. Portfolio of Evidence   5. Interview   6. Third party report |
| 1. Context of Assessment | Competency may be assessed:   1. On-the-job 2. Off-the –job 3. During Industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

# DEMONSTRATE ENTREPRENEURIAL SKILLS

**UNIT CODE :** BUS/OS/MKT/BC/04/6/A

**UNIT DESCRIPTION**

This unit covers the competencies required to demonstrate understanding of entrepreneurship. It involves demonstrating understanding of an entrepreneur, entrepreneurship, and self-employment, identifying entrepreneurship opportunities, creating entrepreneurial awareness, applying entrepreneurial motivation, developing business innovative strategies and developing business plan.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT** | **PERFORMANCE CRITERIA** |
| 1. Demonstrate understanding of an Entrepreneur | 1. Entrepreneurs and Business persons are distinguished as per principles of entrepreneurship 2. ***Types of entrepreneurs*** are identified as per principles of entrepreneurship 3. Ways of becoming an Entrepreneur are identified as per principles of Entrepreneurship 4. ***Characteristics of Entrepreneurs*** are identified as per principles of Entrepreneurship 5. Factors affecting Entrepreneurship development are explored as per principles of Entrepreneurship |
| 1. Demonstrate understanding of Entrepreneurship and self-employment | 1. Entrepreneurship and self-employment are distinguished as per principles of entrepreneurship 2. Importance of self-employment is analysed based on business procedures and strategies 3. ***Requirements for entry into self-employment*** are identified according to business procedures and strategies 4. Role of an Entrepreneur in business is determined according to business procedures and strategies 5. Contributions of Entrepreneurs to National development are identified as per business procedures and strategies 6. Entrepreneurship culture in Kenya is explored as per business procedures and strategies 7. Born or made Entrepreneurs are distinguished as per entrepreneurial traits |
| 1. Identify Entrepreneurship opportunities | 1. Sources of business ideas are identified as per business procedures and strategies 2. Business ideas and opportunities are generated as per business procedures and strategies 3. Business life cycle is analysed as per business procedures and strategies 4. Legal aspects of business are identified as per procedures and strategies 5. Product demand is assessed as per market strategies 6. Types of ***business environment*** are identified and evaluated as per business procedures 7. Factors to consider when evaluating business environment are explored based on business procedure and strategies 8. Technology in business is incorporated as per best practice |
| 1. Create entrepreneurial awareness | 1. ***Forms of businesses*** are explored as per business procedures and strategies 2. Sources of business finance are identified as per business procedures and strategies 3. Factors in selecting source of business finance are identified as per business procedures and strategies 4. ***Governing policies*** on Small Scale Enterprises (SSEs) are determined as per business procedures and strategies 5. Problems of starting and operating SSEs are explored as per business procedures and strategies |
| 1. Apply entrepreneurial motivation | 1. ***Internal and external motivation*** factors are determined in accordance with motivational theories 2. Self-assessment is carried out as per entrepreneurial orientation 3. Effective communications are carried out in accordance with communication principles 4. Entrepreneurial motivation is applied as per motivational theories |
| 1. Develop innovative business strategies | 1. Business innovation strategies are determined in accordance with the organization strategies 2. Creativity in business development is demonstrated in accordance with business strategies 3. ***Innovative business strategies*** are developed as per business principles 4. Linkages with other entrepreneurs are created as per best practice 5. ICT is incorporated in business growth and development as per best practice |
| 1. Develop Business Plan | 1. Identified Business is described as per business procedures and strategies 2. Marketing plan is developed as per business plan format 3. Organizational/Management plan is prepared in accordance with business plan format 4. Production/operation plan in accordance with business plan format 5. Financial plan is prepared in accordance with the business plan format 6. Executive summary is prepared in accordance with business plan format 7. Business plan is presented as per best practice |

**RANGE**

This section provides work environment and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **Variable** | **Range** |
| 1. Types of entrepreneurs may include but not limited to: | * Innovators * Imitators * Craft * Opportunistic * Speculators |
| 1. Characteristics of Entrepreneurs may include but not limited to: | * Creative * Innovative * Planner * Risk taker * Networker * Confident * Flexible * Persistent * Patient * Independent * Future oriented * Goal oriented |
| 1. Requirements for entry into self-employment may include but not limited to | * Technical skills * Management skills * Entrepreneurial skills * Resources * Infrastructure |
| 1. Internal and external motivation may include but not limited to: | * Interest * Passion * Freedom * Prestige * Rewards * Punishment * Enabling environment * Government policies |
| 1. Business environment may include but not limited to: | * External * Internal * Intermediate |
| 1. Forms of businesses may include but not limited to: | * Sole proprietorship * Partnership * Limited companies * Cooperatives |
| 1. Governing policies may include but not limited to: | * Increasing scope for finance * Promoting cooperation between entrepreneurs and private sector * Reducing regulatory burden on entrepreneurs * Developing IT tools for entrepreneurs |
| 1. Innovative business strategies may include but not limited to: | * New products * New methods of production * New markets * New sources of supplies * Change in industrialization |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Analytical
* Management
* Problem-solving
* Root-cause analysis
* Communication

**Required Knowledge**

The individual needs to demonstrate knowledge of:

* Decision making
* Business communication
* Change management
* Competition
* Risk
* Net working
* Time management
* Leadership
* Factors affecting entrepreneurship development
* Principles of Entrepreneurship
* Features and benefits of common operational practices, e. g., continuous improvement (kaizen), waste elimination,
* Conflict resolution
* Health, safety and environment (HSE) principles and requirements
* Customer care strategies
* Basic financial management
* Business strategic planning
* Impact of change on individuals, groups and industries
* Government and regulatory processes
* Local and international market trends
* Product promotion strategies
* Market and feasibility studies
* Government and regulatory processes
* Local and international business environment
* Relevant developments in other industries
* Regional/ County business expansion strategies

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | 1. Assessment requires evidence that the candidate: 2. Distinguished entrepreneurs and businesspersons correctly 3. Identified ways of becoming an entrepreneur appropriately 4. Explored factors affecting entrepreneurship development appropriately 5. Analysed importance of self-employment accurately 6. Identified requirements for entry into self-employment correctly 7. Identified sources of business ideas correctly 8. GeneratedBusiness ideas and opportunities correctly 9. Analysed business life cycle accurately 10. Identified legal aspects of business correctly 11. Assessed product demand accurately 12. Determined Internal and external motivation factors appropriately 13. Carried out communications effectively 14. Identified sources of business finance correctly 15. Determined Governing policy on small scale enterprise appropriately 16. Explored problems of starting and operating SSEs effectively 17. Developed Marketing, Organizational/Management, Production/Operation and Financial plans correctly 18. Prepared executive summary correctly 19. Determined business innovative strategies appropriately 20. Presented business plan effectively |
| 1. Resource Implications | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | 1. Written tests 2. Oral questions 3. Third party report 4. Interviews 5. Portfolio of Evidence |
| 1. Context of Assessment | Competency may be assessed   1. On-the-job 2. Off-the –job 3. During Industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

# 

# DEMONSTRATE EMPLOYABILITY SKILLS

**UNIT CODE:** BU**S**/OS/MKT/BC/05/6/A

**UNIT DESCRIPTON**

This unit covers competencies required to demonstrate employability skills. It involves conducting self-management, demonstrating interpersonal communication, critical safe work habits, leading a workplace team, planning and organizing work, maintaining professional growth and development, demonstrating workplace learning, problem solving skills and managing ethical performance.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function. | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the Range*** |
| 1. Conduct self-management | 1. Personal vision, mission and goals are formulated based on potential and in relation to organization objectives 2. Emotional intelligence is demonstrated as per workplace requirements. 3. Individual performance is evaluated and monitored according to the agreed targets. 4. Assertiveness is developed and maintained based on the requirements of the job. 5. Accountability and responsibility for own actions are demonstrated based on workplace instructions. 6. Self-esteem and a positive self-image are developed and maintained based on values. 7. Time management, attendance and punctuality are observed as per the organization policy. 8. Goals are managed as per the organization’s objective 9. Self-strengths and weaknesses are identified based on personal objectives |
| 1. Demonstrate interpersonal communication | 1. Writing skills are demonstrated as per communication policy 2. Negotiation and persuasion skills are demonstrated as per communication policy 3. Internal and external stakeholders’ needs are identified and interpreted as per the communication policy 4. Communication networks are established based on workplace policy 5. Information is shared as per communication policy |
| 1. Demonstrate critical safe work habits | * 1. Stress is managed in accordance with workplace policy.   2. Punctuality and time consciousness is demonstrated in line with workplace policy.   3. Personal objectives are integrated with organization goals based on organization’s strategic plan.   4. ***Resources*** are utilized in accordance with workplace policy.   5. Work priorities are set in accordance to workplace goals and objectives.   6. Leisure time is recognized and utilized in line with personal objectives.   7. ***Drugs and substances of abuse*** are identified and avoided based on workplace policy.   8. HIV and AIDS prevention awareness is demonstrated in line with workplace policy.   9. Safety consciousness is demonstrated in the workplace based on organization safety policy.   10. ***Emerging issues*** are identified and dealt with in accordance with organization policy. |
| 1. Lead a workplace team | 1. Performance targets for the ***team*** are set based on organization’s objectives 2. Duties are assigned in accordance with the organization policy. 3. ***Forms of communication*** in a team are established according to organization’s policy. 4. Team performance is evaluated based on set targets as per workplace policy. 5. Conflicts are resolved between team members in line with organization policy. 6. Gender related issues are identified and mainstreamed in accordance workplace policy. 7. Human rights and fundamental freedoms are identified and respected as Constitution of Kenya 2010. 8. Healthy relationships are developed and maintained in line with workplace. |
| 1. Plan and organize work | 1. Work plans are prepared based on activities and budget. 2. Assigned tasks are interpreted and expectations identified as per the workplace instructions. 3. Task occupational safety and health requirements are identified and observed regulations. 4. Work resources are identified, mobilized, allocated and utilized based on organization work plans. 5. Work activities are monitored and evaluated in line with work plans and workplace policy. 6. Work plans are reviewed based on target and available resources. |
| 1. Maintain professional growth and development | * 1. Personal training needs are identified and assessed in line with the requirements of the job.   2. ***Training and career opportunities*** are identified and utilized based on job requirements.   3. Resources for training are mobilized and allocated based organizations and individual skills needs.   4. Licensees and certifications relevant to job and career are obtained and renewed as per policy.   5. Work priorities and personal commitments are balanced and managed based on requirements of the job and personal objectives.   6. Recognitions are sought as proof of career advancement in line with professional requirements. |
| 1. Demonstrate workplace learning | * 1. Learning opportunities are sought and managed based on job requirement and organization policy.   2. Improvement in performance is demonstrated based on courses attended.   3. Application of learning is demonstrated in both technical and non-technical aspects based on requirements of the job   4. Time and effort is invested in learning new skills based on job requirements   5. Initiative is taken to create more effective and efficient processes and procedures in line with workplace policy.   6. New systems are developed and maintained in accordance with the requirements of the job.   7. Awareness of personal role in workplace ***innovation*** is demonstrated based on requirements of the job. |
| 1. Demonstrate problem solving skills | * 1. Creative, innovative and practical solutions are developed based on the problem   2. Independence and initiative in identifying and solving problems is demonstrated based on requirements of the job.   3. Team problems are solved as per the workplace guidelines   4. Problem solving strategies are applied as per the workplace guidelines   5. Problems are analyzed and assumptions tested as per the context of data and circumstances |
| 1. Manage ethical performance | * 1. Policies and guidelines are observed as per the workplace requirements   2. Self-worth and professionalism is exercised in line with personal goals and organizational policies   3. Code of conduct is observed as per the workplace requirements   4. Integrity is demonstrated as per legal requirement |

**RANGE**

This section provides work environment and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **Variable** | **Range** |
| 1. Drug and substance abuse may include but not limited to: | Commonly abused   * Alcohol * Tobacco * Miraa * Over-the-counter drugs * Cocaine * Bhang * Glue |
| 1. Feedback may include but not limited to: | * Verbal * Written * Informal * Formal |
| 1. Relationships may include but not limited to: | * Man/Woman * Trainer/trainee * Employee/employer * Client/service provider * Husband/wife * Boy/girl * Parent/child * Sibling relationships |
| 1. Forms of communication may include but not limited to: | * Written * Visual * Verbal * Non verbal * Formal and informal |
| 1. Team may include but not limited to: | * Small work group * Staff in a section/department * Inter-agency group |
| 1. Personal growth may include but not limited to: | * Growth in the job * Career mobility * Gains and exposure the job gives * Net workings * Benefits that accrue to the individual as a result of noteworthy performance |
| 1. Personal objectives may include but not limited to: | * Long term * Short term * Broad * Specific |
| 1. Trainings and career opportunities may includes but not limited to | * Participation in training programs * Serving as Resource Persons in conferences and workshops |
| 1. Resource may include may but not limited to: | * Human * Financial * Technology |
| 1. Innovation may include but not limited to: | * New ideas * Original ideas * Different ideas * Methods/procedures * Processes * New tools |
| 1. Emerging issues may include but not limited to: | * Terrorism * Social media * National cohesion * Open offices |
| 1. Range of media for learning may include but not limited to: | * Mentoring * peer support and networking * IT and courses |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Interpersonal
* Communication
* Critical thinking
* Organizational
* Negotiation
* Monitoring
* Evaluation
* Record keeping
* Problem solving
* Decision Making
* Resource utilization
* Resource mobilization

**Required Knowledge**

The individual needs to demonstrate knowledge of:

* Work values and ethics
* Company policies
* Company operations, procedures and standards
* Occupational Health and safety procedures
* Fundamental rights at work
* Workplace communication
* Concept of time
* Time management
* Decision making
* Types of resources
* Work planning
* Organizing work
* Monitoring and evaluation
* Record keeping
* Gender mainstreaming
* HIV and AIDS
* Drug and substance abuse
* Professional growth and development
* Technology in the workplace
* Innovation
* Emerging issues

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical aspects of Competency | Assessment requires evidence that the candidate:   * 1. Conducted self-management   2. Demonstrated interpersonal communication   3. Demonstrated critical safe work habits   4. Demonstrated the ability to lead a workplace team   5. Planned and organized work   6. Maintained professional growth and development   7. Demonstrated workplace learning   8. Demonstrated problem solving skills   9. Demonstrated the ability to manage performance ethically |
| 1. Resource Implications | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   1. Observation 2. Oral questioning 3. Written test 4. Portfolio of Evidence 5. Interview 6. Third party report |
| 1. Context of Assessment | Competency may be assessed:   1. On-the-job 2. Off-the –job 3. During Industrial attachment |
| 1. Guidance information for assessment | | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

# DEMONSTRATE ENVIRONMENTAL LITERACY

**UNIT CODE:** BUS/OS/MKT/BC/06/6/A

**UNIT DESCRIPTION**

This unit specifies the competencies required to demonstrate environmental literacy. It involves, controlling environmental hazard and environmental pollution, demonstrating sustainable resource use, evaluating current practices in relation to resource usage, identifying environmental legislations/conventions for environmental concerns, implementing specific environmental programs, monitoring activities on environmental protection/Programs , analyzing resource use and developing resource conservation plans

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function. | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the Range*** |
| 1. Control environmental hazard | 1. Storage methods for environmentally hazardous materials are strictly followed according to environmental regulations and OSHS. 2. Disposal methods of hazardous wastes are followed according to environmental regulations and OSHS. 3. ***PPE*** is used according to OSHS. |
| 1. Control environmental Pollution | * 1. Environmental pollution ***control measures*** are implemented in accordance with international protocols.   2. Procedures for solid waste management are observed according Environmental Management and Coordination Act 1999   3. Methods for minimizing noise pollution is complied with based on Noise and Excessive Vibration Pollution and Control Regulations, 2009 |
| 1. Demonstrate sustainable resource use | * 1. Methods for minimizing wastage are complied with based on organizational waste management guide   2. Waste management procedures are employed following principles of 3Rs (Reduce, Reuse, Recycle)   3. Methods for economizing and reducing resource consumption are practiced as per the Constitution of Kenya 2010 Article 69 . |
| 1. Evaluate current practices in relation to resource usage | * 1. Information on resource efficiency systems and procedures are collected and provided as per work groups/sector   2. Current resource usage is measured and recorded as per work group   3. Current purchasing strategies are analyzed and recorded according to industry procedures.   4. Current work processes to access information and data is analyzed following enterprise protocol. |
| 1. Identify environmental legislations/conventions for environmental concerns | 1. Environmental legislations/conventions and local ordinances are identified according to the different environmental aspects/impact 2. Industrial standard/environmental practices are described according to the different environmental concerns |
| 1. Implement specific environmental programs | 1. Programs/Activities are identified according to organizations policies and guidelines. 2. Individual roles/responsibilities are determined and performed based on the activities identified. 3. Problems/constraints encountered are resolved in accordance with organizations’ policies and guidelines 4. Stakeholders are consulted based on company guidelines |
| 1. Monitor activities on Environmental protection/Programs | 1. Activities are periodically monitored and Evaluated according to the objectives of the environmental program 2. Feedback from stakeholders are gathered and considered in Proposing enhancements to the program based on consultations 3. Data gathered are analyzed based on Evaluation requirements 4. Recommendations are submitted based on the findings 5. Management support systems are set/established to sustain and enhance the program 6. Environmental incidents are monitored and reported to 7. concerned/proper authorities |
| 1. Analyze resource use | 1. All resource consuming processes are Identified as per the organizational work plan 2. Quantity and nature of resource consumed is determined based on processes 3. Resource flow is analyzed as per different parts of the process. 4. Wastes are classified according to NEMA regulations on waste management. |
| 1. Develop resource Conservation plans | 9.1. Efficiency of use/conversion of resources is determined according to industry protocol.  9.2. Causes of low efficiency of use of resources are Determined based on industry protocol.  9.3. Plans for increasing the efficiency of resource use are developed based on findings. |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environments and situations that will affect performance.

|  |  |
| --- | --- |
| **Variable** | **Range** |
| 1. PPE may include but not limited to | * + Mask   + Gloves   + Goggles   + Safety hat   + Overall * Hearing protector |
| 1. Control measures may include but not limited to | * Methods for minimizing or stopping spread and ingestion of airborne particles * Methods for minimizing or stopping spread and ingestion of gases and fumes * Methods for minimizing or stopping spread and ingestion of liquid wastes |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Measuring
* Recording
* Analytical
* Monitoring
* Communication
* Writing

**Required Knowledge**

The individual needs to demonstrate knowledge of:

* PPEs
* Environmental regulations
* OSHS
* Pollution
* Waste management
* Principle of 3Rs
* Types of resources
* Techniques in measuring current usage of resources
* Environmental hazards
* Regulatory requirements

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Controlled environmental hazard   2. Controlled environmental pollution   3. Demonstrated sustainable resource use   4. Evaluated current practices in relation to resource usage   5. Demonstrated knowledge of environmental legislations and local ordinances according to the different environmental issues /concerns.   6. Described industrial standard environmental practices according to the different environmental issues/concerns.   7. Resolved problems/ constraints encountered based on management standard procedures   8. Implemented and monitored environmental practices on a periodic basis as per company guidelines   9. Recommended solutions for the improvement of the program   10. Monitored and reported to proper authorities any environmental incidents |
| 1. Resource Implications | The following resources should be provided:   * 1. Workplace with storage facilities   2. Tools, materials and equipment relevant to the tasks (e.g. Cleaning tools, cleaning materials, trash bags)   3. PPE, manuals and references   4. Legislation, policies, procedures, protocols and local ordinances relating to environmental protection   5. Case studies/scenarios relating to environmental Protection |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   * 1. Observation   2. Oral questioning   3. Written test   4. Portfolio of Evidence   5. Interview   6. Third party report |
| 1. Context of Assessment | Competency may be assessed   1. On-the-job 2. Off-the –job 3. During Industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

# DEMONSTRATE OCCUPATIONAL SAFETY AND HEALTH PRACTICES

**UNIT CODE:** BUS/OS/MKT/BC/07/6/A

**UNIT DESCRIPTION**

This unit specifies the competencies required to demonstrate occupational health and safety practices. It involves identifying workplace hazards and risks, identifying and implementing appropriate control measures to hazards and risks and implementing OSH programs, procedures and policies/guidelines.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function. | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the Range*** |
| 1. Identify workplace hazards and risk | 1.1 ***Hazards*** in the workplace are identified ***based their indicators***  1.2 Risks and hazards are evaluated based on legal requirements.  1.3 ***OSH concerns*** raised by workers are addressed as per legal requirements. |
| 1. Control OSH hazards | 2.1 Hazard prevention ***and control measures*** are implemented as per legal requirement.  2.2 Risk assessment is conductedand a risk matrix developed based on likely impact.  2.3 ***Contingency measures***, including ***emergency procedures*** during workplace ***incidents and emergencies*** are recognized and established in accordance with organization procedures. |
| 1. Implement OSH programs | 3.1 Company OSH program are identified, evaluated and reviewed based on legal requirements.  3.2 Company OSH programs are implemented as per legal requirements.  3.3 Workers are capacity built on OSH standards and procedures as per legal requirements  3.4 ***OSH-related records*** are maintained as per legal requirements. |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environments and situations that will affect performance.

|  |  |
| --- | --- |
| **Variable** | **Range** |
| 1. Hazards may include but not limited to: | * Physical hazards – impact, illumination, pressure, noise, * vibration, extreme temperature, radiation * Biological hazards- bacteria, viruses, plants, parasites, mites, molds, fungi, insects * Chemical hazards – dusts, fibers, mists, fumes, smoke, gasses, vapors * Ergonomics * Psychological factors – over exertion/ excessive force,   awkward/static positions, fatigue, direct pressure,   * varying metabolic cycles * Physiological factors – monotony, personal relationship, work out cycle * Safety hazards (unsafe workplace condition) –confined space, excavations, falling objects, gas leaks, electrical, poor storage of materials and waste, spillage, waste and debris * Unsafe workers’ act (Smoking in off-limited areas, Substance and alcohol abuse at work) |
| 1. Indicators may include but not limited to: | * Increased of incidents of accidents, injuries * Increased occurrence of sickness or health complaints/ symptoms * Common complaints of workers related to OSH * High absenteeism for work-related reasons |
| 1. OSH concerns may include but not limited to: | * Workers’ experience/observance on presence of work hazards * Unsafe/unhealthy administrative arrangements (prolonged work hours, no break time, constant overtime, scheduling of tasks) * Reasons for compliance/non-compliance to use of PPEs or other OSH procedures/policies/guidelines |
| 1. Safety gears /PPE (Personal Protective Equipment) may include but not limited to: | * Arm/Hand guard, gloves * Eye protection (goggles, shield) * Hearing protection (ear muffs, ear plugs) * Hair Net/cap/bonnet * Hard hat * Face protection (mask, shield) * Apron/Gown/coverall/jump suit * Anti-static suits * High-visibility reflective vest |
| 1. Appropriate risk controls   may include but not limited to: | * Appropriate risk controls in order of impact are as follows: * Eliminate the hazard altogether (i.e., get rid of the dangerous machine) * Isolate the hazard from anyone who could be harmed (i.e., keep the machine in a closed room and operate it remotely; barricade an unsafe area off) * Substitute the hazard with a safer alternative (i.e., replace the machine with a safer one) * Use administrative controls to reduce the risk (i.e., train workers how to use equipment safely; train workers about the risks of harassment; issue signage) * Use engineering controls to reduce the risk (i.e., attach guards to the machine to protect users) * Use personal protective equipment (i.e., wear * gloves and goggles when using the machine) |
| 1. Contingency measures may include but not limited to: | * Evacuation * Isolation * Decontamination * (Calling designed) emergency personnel |
| 1. Incidents and emergencies may include but not limited to: | * Chemical spills * Equipment/vehicle accidents * Explosion * Fire * Gas leak * Injury to personnel * Structural collapse * Toxic and/or flammable vapors emission. |
| 1. OSH-related Records may include but not limited to: | * Medical/Health records * Incident/accident reports * Sickness notifications/sick leave application * OSH-related trainings obtained |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Communication
* Interpersonal
* Presentation
* Risk assessment
* Evaluation
* Critical thinking
* Problem solving
* Negotiation

**Required Knowledge**

The individual needs to demonstrate knowledge of:

* General OSH Principles
* Occupational hazards/risks recognition
* OSH organizations providing services on OSH evaluation and/or work environment measurements (WEM)
* National OSH regulations; company OSH policies and protocols
* Systematic gathering of OSH issues and concerns
* General OSH principles
* National OSH regulations
* Company OSH and recording protocols, procedures and policies/guidelines
* Training and/or counseling methodologies and strategies

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   1. Identified hazards in the workplace based their indicators 2. Evaluated workplace hazards based on legal requirements. 3. Addressed OSH concerns raised by workers as per legal requirements. 4. Implemented hazard prevention and control measures as per legal requirement. 5. Conducted risk assessment as per legal requirement. 6. Developed risk matrix based on likely impact. 7. Recognized and established contingency measures in accordance with organization procedures. 8. Identified, evaluated and reviewed company OSH program based on legal requirements. 9. Implemented company OSH programs as per legal requirements. 10. Capacity built workers on OSH standards and procedures as per legal requirements 11. Maintained OSH-related records as per legal requirements. |
| 1. Resource Implications | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   1. Observation 2. Oral questioning 3. Written test 4. Portfolio of Evidence 5. Interview 6. Third party report |
| 1. Context of Assessment | Competency may be assessed:   1. On-the-job 2. Off-the –job 3. During Industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

# COMMON UNITS OF COMPETENCY

# MANAGE BUSINESS RESEARCH AND DEVELOPMENT

UNIT CODE: BUS/OS/MKT/CC/1/6/A

UNIT DESCRIPTION

This unit specifies the competencies required to manage business research and development. It involves establishing research problem, developing research plan, conducting business research, analyzing business research findings, and documenting business research findings.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function. | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the Range.*** |
| 1. Establish research problem | * 1. **Research needs** are carried out in accordance with organizational business performance and market demands   2. Customer feedback on organizations’ products and services are gathered based on organizational policy   3. Business research problem is established according to business needs assessment findings |
| 1. Develop research plan | * 1. Research geographical area and ***target population*** is identified based on established research problem   2. Approximate research cost is determined according to the research problem and organizational budget   3. Required man power is established based on the research problem   4. Data ***research methods*** are identified and developed according to research area   5. ***Research tools, materials and equipment*** are identified based on research requirements   6. ***Research hypothesis*** is developed based on the research problem   7. Business research schedule is developed in accordance with research activities |
| 1. Conduct business research | * 1. Business research tools, materials and equipment identified are assembled according to research plan   2. Reconnaissance is conducted according to research plan   3. Business research data and information is collected according to the research schedule   4. Adherence to the research schedule is observed as per the research plan and organization requirement |
| 1. Analyze business research finding | * 1. Business research data and information collected is prepared for analysis   2. Data and information ***analysis tools*** and procedures are established according to statistical requirements   3. Collected business data and information is analyzed and presented based on statistical requirements |
| 1. Document business research findings | * 1. ***Report writing tools*** are obtained in accordance with SOPs   2. Business report is developed based on analyzed business data and information   3. Business report recommendation is shared and implemented based on organization policy |

RANGE OF VARIABLES

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environments and situations that will affect performance.

|  |  |
| --- | --- |
| **RANGE** | **VARIABLE** |
| 1. Research needs may include but not limited to | * Introduction of new products and services * Modified products and services * Market expansion * Product channels * Product discontinuation |
| 1. Target population may include but not limited to | * Age * Occupations * Sex * Economic demographics |
| 1. Research methods may include but not limited to | * Questionnaires and surveys * Interviews * Observations * Case studies * Documents and records |
| 1. Research tools, materials and equipment may include but not limited to | * Writing materials * Developed questionnaires * Tablets * Computers * Cameras * Check sheets * Control charts |
| 1. Research hypothesis may include but not limited to | * Null hypothesis * Non- directional * Directional * Causal |
| 1. Analysis tools may include but not limited to | * Computers * Database * Data analysis software |
| 1. Report writing tools may include but not limited to | * Computer * Stationery |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Communication
* Problem solving
* Data collection and analysis
* Presentation
* Basic management
* Time management
* Adaptability
* Report writing

**Required knowledge**

The individual needs to demonstrate knowledge of:

* Management of business research and development
* Legal requirements and regulations in business operations
* Methods of data collection
* Data analysis and interpretation
* Research documentation
* Basic computer operations
* New product development
* Product and process improvement
* Proposal development
* Product costing
* New products standards and specification

EVIDENCE GUIDE

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical aspects of competency | Assessment requires evidence that the candidate:   * 1. Carried out research needs   2. Gathered customers’ feedback on organizations’ products and services   3. Determined approximate research cost   4. Identified and developed data research methods   5. Identified and gathered research tools, materials and equipment   6. Developed research hypotheses and schedule   7. Collected, analyzed and shared business data and information   8. Documented business research and findings |
| 1. Resource   implication | The following resources should be provided:   * 1. Access to relevant workplace where assessment can take place   2. Appropriately simulated environment where assessment can take place |
| 3. Method of  assessment | Competency in this unit may be assessed through:  3.1 Observation  3.2 Written  3.3 Oral  3.4 Project/ case study |
| 4. Context of  assessment | Competency may be assessed:  4.1 On-the-job  4.2 Off-the –job  4.3 During Industrial attachment |
| 5. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

# CORE UNITS OF COMPETENCY

# MANAGE MARKETING STRATEGY

**UNIT CODE:** BUS/OS/MKT /CR/1/6/A

**UNIT DESCRIPTION**

This unit specifies the competencies required to manage marketing strategy. It involves determining market analysis model and marketing priorities to drive strategy, conducting market risk analysis, designing route to market, consolidating marketing plans, carrying out marketing activities, monitoring and evaluating marketing activities.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Determine market analysis model | * 1. ***Marketing objectives***are set in accordance with organization goals   2. ***Demographics*** and segmentationis determined according to market statistics report   3. Target market is identified and defined in accordance with market statistics report.   4. Market needs are assessed in accordance with market consumer trend reports   5. Competition is analyzed in accordance with industry and financial reports   6. Market analysis model is selected in accordance with marketing reports |
| 1. Determine marketing priorities to drive strategy | * 1. Marketing activities are identified in accordance with organization’s marketing plan   2. Marketing activities are analyzed in accordance with Cost Benefit Analysis (CBA) Model   3. Marketing activities are prioritized in accordance with Return On Investment (ROI) Analysis   4. Marketing activities are matched with strategy in accordance with marketing procedures |
| 1. Conduct market risk analysis | * 1. ***Market risks*** are identified according to the industry/economic reports   2. Market risks are categorized in accordance with organization’s risk matrix   3. Market risk monitors are appointed in accordance to organization structure   4. Market risk mitigation is carried out in accordance with organization’s risk management policies and procedures   5. Periodic reviews of risks are carried out in accordance with organization’s risk management policy and procedures. |
| 1. Design route to market | 4.1 Distribution landscape is evaluated in accordance with market statistics report   * 1. Optimal distribution channel is identified in accordance with the organizations sales and marketing report   2. ***Potential retail partners*** are ranked and prioritized in accordance with Industry report |
| 1. Consolidate marketing plans | * 1. Marketing objectives are refined in accordance with the organizations strategic plans   2. Marketing plans are prepared in accordance with the marketing strategy   3. Marketing activities are ranked and prioritized in accordance with the marketing strategy   4. ***Resources*** are allocated in accordance with the prioritized activities   5. Marketing plans are consolidated in accordance with the budget procedures |
| 1. Carry out marketing activities | * 1. Marketing calendar of activities is prepared in accordance with marketing procedures   2. Marketing calendar is approved in accordance with marketing policy and procedures   3. Marketing **r*oles*** are assigned in accordance with marketing plan and HR procedures   4. Marketing activities are conducted in accordance with the marketing calendar of activities |
| 1. Monitor and evaluate marketing activities | * 1. Marketing activity information and data is collected and analyzed in accordance with marketing procedures   2. Marketing findings are compared with marketing objectives in accordance with marketing procedures   3. Corrective action is carried out in accordance with marketing strategy   4. ***Follow up on corrective action*** is carried out in accordance with corrective action report. |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

| **Variable** | **Range** |
| --- | --- |
| 1. Marketing objectives may include but not limited to: | * Brand engagement * Customer satisfaction * Raise revenue * Increase profit margins * Improve product quality * Product differentiation * Increase sales * Communication (Differentiate, Remind, Inform, Persuade) |
| 1. Demographics may include but not limited to: | * Age groups * Gender * Race * Religion * Culture |
| 1. Market risks may include but not limited to: | * Government policies and regulations * Political * Economic * Natural calamity * Competition * Technological |
| 1. Potential retail partners may include but not limited to: | * Supermarkets * Stockist * Hypermarkets * Restaurants * Agents |
| 1. Resources may include but not limited to: | * Human * Finances * Equipment * Communication channels |
| 1. Roles may include but not limited to: | * Finance team * Brand manager * Key accounts manager * Logistics manager * Procurement * Project management |
| 1. Follow up corrective action report may include but not limited to: | * Variances * Root causes * Corrective actions * Closing corrective action follow up |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

* Marketing plan
* Market risks
* Route to market
* Marketing activities
* Business competitive edge
* Policies and procedures
* Marketing priorities
* Balanced score card analysis
* Basic procurement principles
* Return On Investment (ROI)
* Variance analysis
* Corrective action plan
* Marketing strategy
* Organization vision, mission, goals, objectives and values
* Monitoring and evaluating marketing activities
* Report writing
* Project management
* Research

**SKILLS**

The individual needs to demonstrate the following skills:

* Networking
* Analytical
* Creativity
* Communication
* Presentation
* Reporting
* Planning and coordination
* Monitoring and evaluating
* Critical thinking
* Resource utilization
* Research skills
* Numeracy skills

**EVIDENCE GUIDE**

This provides guidance on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and, range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Set marketing objectives in accordance with organization goals   2. Determined demographicsand segmentation   3. Assessed marketing needs in accordance with consumer trends reports   4. Analyzed competition in accordance with industry and financial reports   5. Identified and prioritized marketing activities in accordance with CBA and ROI   6. Categorized marketing risks in accordance with organizations risk matrix   7. Developed risk mitigation measures in accordance with risk management policy and procedures   8. Evaluated distribution landscape in accordance with marketing statistics reports   9. Identified strong distribution channels in accordance with sales and marketing reports   10. Consolidated marketing plans in accordance with budgets   11. Carried out marketing activities in accordance with marketing strategy and calendar   12. Monitored and evaluated marketing activities in accordance with marketing strategy and procedures |
| 1. Resource Implications | The following resources must be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Written tests   2. Oral questioning   3. Third party reports   4. Case studies and projects |
| 1. Context of Assessment | Competency may be assessed:  4.1 On-the-job  4.2 Off-the –job  4.3 During Industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

# CONDUCT MARKET ANALYSIS

**UNIT CODE:** BUS/OS/MKT/CR/2/6/A

**UNIT DESCRIPTION**

This unit specifies the competencies required to conduct market analysis. It involves establishing market analysis objective, preparing market analysis budget, conducting market segmentation, gathering market analysis data and preparing market analysis report.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Establish market analysis objective. | * 1. ***Marketing environment*** is analysed in accordance with financial and industry reports.   2. ***SWOT analysis*** is carried out in accordance with the marketing plan.   3. Marketing analysis objectives are developed in accordance with the goals and potential capability of the organization.   4. Marketing analysis objectives are reviewed and revised in accordance with the marketing strategy. |
| 1. Prepare market analysis budget. | * 1. Available resources are identified in accordance with Organization’s reports   2. Market analysis activities are undertaken in accordance with the marketing strategy   3. ***Resource deficit*** is determined in accordance with finance reports   4. Market analysis budget is prepared in accordance with Budgetary procedures   5. Adjustment in budget are carried out in accordance with budgetary procedures   6. Approval of budget is carried out in accordance with budget policies and procedures |
| 1. Conduct market segmentation | * 1. Rationale for ***segmentation*** is determined in accordance with product/service characteristics   2. Market segments are defined in accordance with the organization’s segmentation criteria   3. Segments are analyzed in accordance with industry landscape   4. Target segment is selected in accordance with product value proposition |
| 1. Gather market analysis data | * 1. Target audience is identified in accordance with market analysis objectives   2. ***Data collection methods and tools*** are determined in accordance with data collection procedures   3. Market analysis budget is prepared in accordance with budget procedures   4. Data is collected in accordance with selected data collection method   5. Data collected is analysed in accordance with marketing analysis procedures |
| 1. Prepare market analysis report | * 1. Data collected is compiled and evaluated in accordance with data reporting procedures   2. Recommendations are made in accordance with the findings of analysed data   3. Marketing analysis report is prepared and shared in accordance with marketing reporting procedures |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

| **Variable** | **Range** |
| --- | --- |
| 1. Marketing environment includes but not limited to: | * Competition * Technology * Social * Cultural * Political * Economic * Legal |
| 1. SWOT analysis includes but not limited to: | * Strength * Weaknesses * Opportunities * Threats |
| 1. Resource deficit includes but not limited to: | * Human Resource * Skills * Technology * Funding * Time |
| 1. Segmentation includes but not limited to: | * Age * Gender * Location * Race * Purchasing power |
| 1. Data collection methods includes but not limited to: | * Primary data * Secondary data * Interviews * Observation * Literature review |
| 1. Data Collection Tools | * Interview schedule * Questionnaires * Literature review |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

* Market analysis objective
* Market segmentation
* Industry landscape
* Policies and procedures
* Market analysis tools
* Data analysis
* Market analysis budget
* Marketing environment
* Research methods
* ICT
* Marketing environment
* Report writing

**SKILLS**

The individual needs to demonstrate the following skills:

* Arithmetic
* Analytical
* Computer – Excel, PowerPoint, Word, SPSS
* Communication
* Presentation
* Management reporting
* Research
* Critical thinking
* Resource utilisation
* Time management

**EVIDENCE GUIDE**

This provides guidance on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Analysed marketing environment   2. Carried out SWOT analysis   3. Reviewed marketing objectives   4. Prepared marketing analysis budget   5. Undertook/ conducted market segmentation   6. Selected target market segment   7. Determined data collection method   8. Demonstrated ability to apply data collection tools   9. Analysed data collected   10. Prepared a market analysis report |
| 1. Resource Implications | The following resources must be provided:   * 1. Access to relevant workplace where assessment can take place   2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency may be assessed through:  3.1 Written tests  3.2 Oral questioning  3.3 Third party reports  3.4 Case studies  3.5 Scenarios  3.6 Project research and report |
| 1. Context of Assessment | Competency may be assessed:   * 1. On the job   2. Off the job   3. During industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

# DEVELOP MARKETING COMMUNICATION PLAN

**UNIT CODE:** BUS/OS/MKT/CR/3/6/A

**UNIT DESCRIPTION**

This unit specifies the competencies required to develop marketing communication plan. It involves determining brand essence, evaluating consumer insight, designing and testing communication content and channel, carrying out corrective action and preparing a marketing communication plan.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Determine brand essence | * 1. Brand characteristics are determined in accordance with organizational goals   2. Brand benefits are determined in accordance with brand characteristics   3. Brand benefits are aligned with the marketing objectives in accordance with marketing strategy   4. ***Brand essence*** is determined in accordance with brand personality |
| 1. Evaluate consumer insights | 2.1 Target group is determined in accordance with marketing strategy  ***2.2 Data collection instruments*** are identified in accordance with data collection procedures  2.3 Budget for data collection is prepared in accordance with budget procedures  ***2.4 Consumer insight*** data is collected in accordance with data collection procedures  2.5 Consumer insights data is evaluated in accordance with marketing procedures |
| 1. Design Communication content | 3.1 Tag line is selected in accordance with brand strategy  3.2 Communication channel is determined according to marketing strategy  ***3.3 Content aesthetic*** is designed in accordance with marketing trends  3.4 Communication content is created in accordance with communication plan and legal requirements |
| 1. Test communication content and channel | 4.1 Target audience is identified in accordance with marketing strategy  ***4.2 Communication channel*** is identified in accordance with target audience  4.3 Communication content is scheduled in the channels in accordance with communication plan  4.4 Communication content is sent to audience in accordance with communication schedule  4.5 Target audience responses are analyzed in accordance with data analysis procedure |
| 5. Carry our corrective action | 5.1Analyzed responses are documented in accordance with communication strategy  5.2 Communication content is corrected in accordance with consumer insights  5.3 Revised communication content/channel is rolled out in accordance with the communication schedule  5.4 Corrective action report is prepared in accordance with reporting procedures |
| 6. Prepare a marketing communication plan | 6.1 Marketing communication objectives are identified in accordance with marketing strategy  6.2 Target audience is selected in accordance with marketing strategy  ***6.3Unique selling point*** is identified in accordance with product characteristics  6.4 Communication channels are selected in accordance with target audience  6.5Communication plan timelines are established in accordance with marketing strategy  6.6 Communication plan results are evaluated in accordance with organization procedures. |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

| **Variable** | **Range** |
| --- | --- |
| 1. Brand essence may include but not limited to: | * Brand characteristics * Brand benefits * Brand personality |
| 1. Data collection instruments may include but not limited to: | * Questionnaires * Interviews * Observations * Focus group discussion * Surveys |
| 1. Consumer insights may include but not limited to: | * Digital Media trends * Suggestions * Complaints * Complements/ compliments * Trends in human behavior |
| 1. Content aesthetics may include but not limited to: | * Colour codes * Font type & size * Memes * Graphic Interchange Format (GIF) |
| 1. Communication channel may include but not limited to: | * Digital Media * Above the line communication (TV, Billboards, Radio) * Below the line communication (fliers, road shows) |
| 1. Unique Selling Point may include but not limited to: | * Tag line * Quality of service/goods * Price * Location |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

* Communication channels
* Website
* Social media
* Direct marketing
* Digital marketing
* Consumer insights
* Brand essence
* Communication legal aspects
* Business operations
* Basic procurement principles
* Communication plans
* Data analysis
* Corrective action plan
* Goal setting
* Organization vision, mission, goals objectives and values
* Monitoring and evaluating
* Budgeting
* Report writing

**SKILLS**

The individual needs to demonstrate the following skills:

* Data analysis
* Planning
* Networking
* Communication
* Presentation
* Reporting
* Monitoring and evaluating
* Critical thinking
* Resource utilization

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Determined brand characteristics, benefits and essence   2. Aligned brand benefits with marketing objectives   3. Determined target group(s)   4. Identified data collection instruments   5. Prepared data collection budget for collecting consumer insight information   6. Evaluated consumer insight data   7. Selected tagline   8. Developed communication content   9. Identified audience and communication channel   10. Analyzed audience responses   11. Prepare communication plan |
| 1. Resource Implications | The following resources must be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Written tests   2. Oral questioning   3. Third party reports   4. Case studies |
| 1. Context of Assessment | Competency may be assessed:   * 1. On the job   2. Off the job   3. During industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

# DEVELOP MARKETING BUDGET

**UNIT CODE:** BUS/OS/MKT/CR/4/6/A

**UNIT DESCRIPTION**

This unit specifies the competencies required to develop marketing budget. It involves establishing marketing priorities and marketing budget, preparing marketing activities schedule, allocating costs to marketing activities, determining marketing activities revenue projections and presenting marketing budget for approval.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Establish marketing priorities. | * 1. Previous marketing plans are reviewed in accordance with marketing procedures.   2. ***Marketing objectives*** are established in accordance with marketing goals   3. Previous priorities are reviewed in accordance with marketing reports   4. Competition is analyzed in accordance with industry reports   5. Marketing priorities are established in accordance with the marketing strategy |
| 1. Establish marketing budget | * 1. Marketing ***budget approach*** is identified in accordance with budgeting policy and procedures   2. Marketing ***budget expenditure setting*** is determined according to the Finance and marketing policy   3. ***Budgeting methods*** are determined according to marketing budget policy and procedures   4. Marketing budget is prepared in accordance with marketing budget procedure |
| 1. Prepare marketing activities schedule | 1. Review of available organization resources is carried out in accordance with finance and HR reports 2. Marketing activities are identified in accordance to the marketing plan 3. Organization resource are reallocated in accordance with marketing activity plans 4. ***Marketing activities*** schedule is prepared in accordance with marketing plan |
| 1. Allocate costs to marketing activities | 4.1 ***Budget period*** is determined in accordance with marketing activity  4.2 ***Budget holders*** are assigned responsibilities in accordance with marketing activities  4.3 Expenditure limits of marketing activities are determined in accordance with budgeting policies and procedures  4.4 Marketing sub activities are prioritized in accordance with marketing procedures  4.5 Costs are allocated to marketing activities in accordance with budgeting procedures |
| 1. Determine marketing activities revenue projections | 1. Previous revenue budgets are reviewed in accordance with budget procedures 2. Current ***competitor landscape*** is analyzed in accordance with industry reports 3. ***Internal capacities*** are analyzed in accordance with marketing reports 4. Reality checks are carried out in accordance with budgeting techniques 5. Revenue projections re-forecasts are carried out in accordance with marketing procedures 6. Assumptions in budgets are determined in accordance with projections 7. Marketing activities revenue projections are prepared in accordance with marketing procedures |
| 1. Present marketing budget for approval. | * 1. Marketing budgets are consolidated in accordance with budgeting procedures   2. Consolidated budget is presented to the top management in accordance with budgeting policy and procedure   3. Budget is approved and publicized as per budget communications procedures |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

| **Variable** | **Range** |
| --- | --- |
| 1. Marketing objectives may include but not limited to: | * Increase sales * Increase margins * Increase market share * Market entry * Increase brand visibility |
| 1. Budget approach may include but not limited to: | * Top –down * Bottom – up |
| 1. Budget expenditure setting may include but not limited to: | * Percentage of projected sales * Previous year’s sales * Industry ratio * Competitors’ ratios * Affordable budgeting |
| 1. Budget methods may include but not limited to: | * Line Budgeting * Activity based Budgeting * Zero/ Priority based Budgeting |
| 1. Marketing activities may include but not limited to: | * Branding * Use of Internet (social media, website, SEM, SEO) * Public relations(PR) * Promotions * Trade Shows/events * Direct Marketing * Channel Marketing * Marketing materials (Brochures) |
| 1. Budget period   may include but not limited to: | * Annual * Semi annual * Quarterly * Monthly |
| 1. Budget holders   may include but not limited to: | * Brand Manager * Marketing Executive * Event Manager |
| 1. Competitor landscape may include but not limited to: | * Sales volume * Products * Technology * Human Resource capacity |
| 1. Internal capacities may include but not limited to: | * Human Resource * Technological advancement * Product development * Infrastructure |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

* Marketing environment
* Budgetary control
* Policies and procedures
* Business operations
* Balance Score card analysis
* Basic procurement principles
* Tactical plans
* Standard operating procedures
* Corrective action plan
* Goal setting
* Organization vision, mission, goals objectives and values
* Monitoring and evaluating business operations
* Report writing

**SKILLS**

The individual needs to demonstrate the following skills:

* Arithmetic
* Logical
* Analytical
* Communication
* Presentation
* Reporting
* Monitoring and evaluating
* Critical thinking
* Resource utilisation

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Reviewed previous marketing plan   2. Established marketing objectives   3. Established marketing priorities   4. Identified budgeting approach   5. Determined budgeting method   6. Prepared marketing budget   7. Prepared marketing activity schedule   8. Determined the marketing expenditure limit   9. Prioritised sub-activities   10. Allocated costs to marketing activities   11. Analyze current competitor landscaper and internal capacities   12. Prepared marketing activities revenue projection   13. Consolidated marketing budget   14. Presented consolidated for budget for approval |
| 1. Resource Implications | The following resources must be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency may be assessed through:   1. Written tests 2. Oral questioning 3. Third party reports 4. Case studies |
| 1. Context of Assessment | Competency may be assessed:   * 1. On the job   2. Off the job   3. During industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

# DEVELOP TRADE CHANNEL PLANS

**UNIT CODE:** BUS/OS/MKT/CR/5/6/A

**UNIT DESCRIPTION**

This unit specifies the competencies required to develop trade and channel plans. It involves managing compliance and regulatory activities, carrying out consumer and market mapping, matching consumer needs to distribution channel, gathering channel insights, determining best channel(s), determining trade activities and preparing trade channel plans.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Manage Compliance and regulatory activities | * 1. Marketing compliance requirements and regulations are identified in accordance with regulatory bodies and regulatory requirements   2. Product (goods and services) are assessed for regulatory requirements in accordance with organization’s compliance policy   3. Corrective measures are undertaken in accordance with the regulatory requirements   4. Compliance process is monitored in accordance with compliance policy and regulatory requirements |
| 1. Carry out Consumer and market mapping | * 1. **Consumer trends** are assessed in accordance with market analysis report.   2. Geographical realities are specified in accordance with national census report.   3. Trade Landscape is analyzed in accordance with industry reports.   4. Key trade channels are identified in accordance with industry report. |
| 1. Match Consumer needs to distribution Channel | * 1. **Market size** is determined in accordance with industry report.   2. **Price strategy** is determined in accordance with organization pricing policy and competitor analysis report.   3. Consumer **purchasing pattern** is analyzed in accordance with trade reports.   4. **Distribution channel** is selected in accordance with consumer needs report. |
| 1. Gather channel insights | * 1. Best in Class ***Route to Market*** (RtM) ***Models*** are identified in accordance with trade reports.   2. Model of Competitor RtM are analysed in accordance with competitor analysis report.   3. **Channels performance** is analysed in accordance with industry report. |
| 1. Determine best channel (s). | * 1. Route to Market (RtM) options are identified in accordance with industry reports and marketing strategy.   2. **Picture of success** is determined in accordance with marketing strategy.   3. RtM is selected in accordance with DIME Approach (Direct, Indirect, Mix & Everything in between)   4. Strategy Map is defined and prepared for approval in accordance with marketing strategy. |
| 1. Determine trade activities. | * 1. Trade activity models are analyzed in accordance with marketing strategy   2. Channel classification is carried out in accordance with marketing strategy.   3. Territory planning and allocation is prepared in accordance with sales and marketing plan.   4. **Technology for monitoring** trade activities is selected in accordance to marketing strategy.   5. **Point of Sale Material** (POSM) are selected in accordance with marketing strategy.   6. Trade activities are scheduled in accordance with sales and marketing strategy. |
| 1. Prepare trade channel plans | * 1. **Trade tool kit** is prepared in accordance with sales and marketing strategy.   2. Activity Calendar is prepared in accordance with sales and marketing strategy.   3. Trade activity budgets are prepared in accordance with budgetary procedures and policies.   4. Trade channel plan is approved in accordance with sales and marketing procedures. |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

| **Variable** | **Range** |
| --- | --- |
| 1. Consumer trends may include but not limited to: | * Consumer behaviors * Purchasing/buying patterns * Social media posts |
| 1. Market size may include but not limited to: | * Consumer base * Customer base * Profitability * Competitive advantage |
| 1. Pricing strategy may include but not limited to: | * Cost of production * Labor * Advertising expenses * Competitor analysis |
| 1. Purchasing pattern may include but not limited to: | * Purchasing frequency * Purchasing quantity * Purchasing duration * Purchasing time |
| 1. Distribution channel may include but not limited to: | * Wholesalers * Retailers * Distributors * Internet/digital * Dealers * Consultants |
| 1. Route to market models may include but not limited to: | * Direct * Indirect |
| 1. Channel performance may include but not limited to: | * Sales * Engagement * Product orders |
| 1. Picture of success may include but not limited to: | * Sales targets * Brand recognition * Market Share * Awards |
| 1. Technology for monitoring sales may include but not limited to: | * Email tracking software * Social selling tools * Web conferencing * E-commerce |
| 1. Point of Sale Material may include but not limited to: | * Flyers * Banners * Gondola * Branded tents |
| 1. Trade tool kit may include but not limited to: | * Sales plans * Marketing plan * Production plan * Human Resource Plan |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

* Organization’s and market regulations
* Competitor activities
* Trade channels
* Route to market
* Logistics
* Marketing technology
* Consumer trends
* Branding
* Business Strategic Planning
* Policies and procedures
* Business operations
* Balance Score card analysis
* Basic procurement principles
* Tactical plans
* Corrective action plan
* Goal setting
* Organization vision, mission, goals objectives and values
* Monitoring and evaluating operations
* Report writing

**SKILLS**

The individual needs to demonstrate the following skills:

* Analytical
* Communication
* Presentation
* Reporting
* Monitoring and evaluating
* Critical thinking
* Resource utilization

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Identified market compliance and regulatory requirements   2. Assessed consumer trends   3. Analyzed trade landscapes   4. Analyzed consumer purchasing patterns   5. Selected distribution channels   6. Analyzed RtM models   7. Determined picture of success   8. Prepared territory planning and allocation   9. Selected technology for monitoring trade activities   10. Scheduled trade activities   11. Prepared activity calendar   12. Prepared trade activity budget |
| 1. Resource Implications | The following resources must be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Written tests   2. Oral questioning   3. Third party reports   4. Case studies |
| 1. Context of Assessment | Competency may be assessed:   * 1. On the job   2. Off the job   3. During industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

# MANAGE CONSUMER EXPERIENCE

**UNIT CODE:** BUS/OS/MKT/CR/6/6/A

**UNIT DESCRIPTION**

This unit specifies the competencies required to manage consumer experience. It involves collecting consumer insights, determining engagement model, creating communication content, testing engagement content, evaluating consumer experience, innovating and renovating consumer experience pipeline and preparing consumer experience report.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Collect Consumer insights | * 1. ***Target audience*** is identified in accordance with marketing strategy   1.2 Historical data on consumer behavior is analysed in accordance with industry reports  1.3 Gaps in current trends are identified in accordance with industry reports  1.4 Channels of collecting consumer insight are identified in accordance with data collection procedures  ***1.5Consumer insight*** budget is prepared in accordance with budgeting procedures  1.6 Consumer insight report is prepared in accordance with marketing procedures |
| 1. Determine engagement model | 2.1 Purpose of engagement model is identified in accordance with marketing strategy  2.2 Target audience is identified in accordance with brand strategy  2.3 Engagement channels are determined in accordance with consumer insight report  2.4 Audience engagement is carried out in accordance with Consumer service excellence standards policy and procedure  2.5 Engagement channels are evaluated in accordance with customer service excellence standards policy and procedure |
| 1. Create communication content | 3.1 Tag line is selected in accordance with marketing strategy  3.2 Communication channel is determined according to marketing strategy  ***3.3 Content aesthetic*** is designed in accordance with marketing trends  3.4 Communication content is created according to communication plan |
| 1. Test engagement content | 4.1 Audience is identified in accordance with marketing strategy  4.2 ***Communication channel*** is identified in accordance with target audience  4.3 Content is scheduled in the marketing channels in accordance with communication plan  4.4 Content is sent to audience in accordance with communication schedule  4.5 Audience responses are analysed in accordance with data analysis procedure |
| 1. Evaluate consumer experience | 5.1 Target audience is selected in accordance with consumer data base  5.2 ***Consumer experience*** to be measured is determined in accordance with marketing strategy  5.3 ***Data collection channels*** are designed in accordance with data collection procedures  5.4 Data collected is analysed in accordance with data analysis procedure  5.5 Consumer experience gaps are identified in accordance with data analysed  5.6 Corrective measures are carried out in accordance with Customer service excellence standard procedures  5.7Consumer experience report is prepared in accordance with Consumer service excellence standard procedures |
| 1. Innovate and renovate consumer experience pipeline | 6.1 Objectives are set in accordance with consumer experience analysis reports  6.2 Target audience is identified in accordance with marketing strategy  6.3 Consumer insight data is collected in accordance with data collection procedures  6.4 Existing products are evaluated in accordance with marketing information  ***6.5 Competitor activity*** is analysed in accordance with data analysis procedure  6.6 New processes are created in accordance with innovation procedures  6.7 Prototype is created in accordance with innovations procedures  6.8 New process is launched in accordance with marketing strategy |
| 1. Prepare consumer experience report | 7.1 Consumer experience data is analysed in accordance with marketing strategy  7.2 Consumer experience recommendations are made in accordance with analysed data  7.3 Consumer experience report is prepared and shared in accordance with marketing procedures |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

| **Variable** | **Range** |
| --- | --- |
| 1. Target audience includes but not limited to: | * Age * Gender * Ethnicity * Location * Personalities * Culture |
| 1. Consumer insights includes but not limited to: | * Consumer behavior * Purchasing power * Purchasing patterns |
| 1. Content aesthetics includes but not limited to: | * Font size * Colour coordination * MEMEs * Graphic Interchange Format (GIFs) |
| 1. Communication channel includes but not limited to: | * Digital media * Below the line * Above the line |
| 1. Consumer experience includes but not limited to: | * Touch points (website, digital pages) * Quality of service/product |
| 1. Data collection channels includes but not limited to: | * Surveys * Questionnaires * Focus groups * Journals * Feedback forms * Statistical reports |
| 1. Competitor activities includes but not limited to: | * Price adjustment * Innovations/Renovations * Content revision |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

* Consumer behavior
* Data collection
* Engagement channels
* Communication channels
* Content creation
* Customer service
* Know Your Customer (KYC)
* Policies and procedure
* Balance Score card analysis
* Basic procurement principles
* Goal setting
* Organization vision, mission, goals objectives and values
* Monitoring and evaluating business operations
* Report writing

**SKILLS**

The individual needs to demonstrate the following skills:

* Creativity
* Networking
* Analytical
* Communication
* Presentation
* Reporting
* Monitoring and evaluating
* Critical thinking
* Resource utilization
* Innovation
* Writing

**EVIDENCE GUIDE**

This provides guidance on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Identified target audience   2. Collected and analyzed consumer insights   3. Prepared a consumer insight analysis budget   4. Prepared consumer insight report   5. Identified consumer engagement purpose   6. Determined engagement purpose and channel   7. Selected tagline   8. Designed content aesthetics   9. Created communication content   10. Identified communication channel   11. Delivered content to audience   12. Analyzed audience response   13. Determined consumer experience to be measured   14. Designed data collection channel   15. Analysed data collected   16. Identified consumer experience gap   17. Carried out corrective measures   18. Analyzed competitor activity   19. Created new processes   20. Prepared consumer experience report |
| 1. Resource Implications | The following resources must be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Written tests   2. Oral questioning   3. Third party reports   4. Case studies   5. Samples |
| 1. Context of Assessment | Competency may be assessed:   * 1. On the job   2. Off the job   3. During industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

# DEVELOP BRAND STRATEGY

**UNIT CODE:** BUS/OS/MKT/CR/7/6/A

**UNIT DESCRIPTION**

This unit specifies the competencies required to develop brand strategy. It involves determining brand objectives, managing brand barriers, determining brand identity and brand positioning, developing content communication strategy content and evaluate brand strategy.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Determine brand objectives | * 1. Brand purpose is determined in accordance with the organizations competitive advantage/core competencies   2. Brand audience is identified in accordance with target market statistics   3. **Brand objectives** are determined in accordance with organization’s overall business strategy.   4. Brand objectives timelines are assessed in accordance with organization’s overall business strategy. |
| 1. Manage brand barriers | * 1. **Customer profile** is created in accordance with brand strategy.   2. **Market research** is carried out in accordance with industry report.   3. B**rand barriers** are analysed in accordance with industry and internal marketing analysis   4. Crushing brand barriers are carried out in accordance with marketing strategy   5. **Brand offering** is reassessed in accordance with marketing strategy. |
| 1. Determine brand identity | * 1. **Brand persona** is determined in accordance with brand strategy.   2. Compliance with branding regulations is assessed in accordance with existing laws and regulations   3. **Brand identity** is compared to competition offering in accordance with competition analysis report.   4. Existing brand is reviewed in accordance with brand audit survey.   5. **Brand visuals** are developed in accordance with marketing strategy   6. Brand manualis compiled in accordance with marketing policy |
| 1. Determine brand positioning | 4.1 Target audience is reviewed in accordance with branding strategy  4.2 Market is defined in accordance with industry reports.  4.3 Brand competition is analyzed in accordance with competition analysis report.  4.4 Critical **brand benefits** are identified in accordance with branding strategy.  4.5 Brand benefits are communicated to consumers in accordance with marketing strategy |
| 1. Develop communication strategy content | 5.1 Brand communication objectives are determined in accordance with marketing strategies.  5.2***Key messages*** are developed in accordance with marketing strategy.  5.3 Communication tactical plan is developed in accordance with marketing strategy.  5.4 Review of communication content is carried out in accordance with marketing and communication strategy. |
| 1. Evaluate brand strategy | 6.1 Brand feedback from target audience is analysed in accordance with marketing procedures   * 1. C***ustomer satisfaction measures*** are identified and carried out in accordance with brand strategy targets   2. Brand acceptance is tested in accordance with industry brand health reports.   3. Brand impact is measured in accordance with marketing strategy optimization targets   4. Recommendations from brand strategy evaluation are shared and implemented. |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

| **Variable** | **Range** |
| --- | --- |
| 1. Brand objectives may include but not limited to: | * Volume growth * Brand visibility * Brand awareness * Brand loyalty * Industry leader * Award winner |
| 1. Customer profile may include but not limited to: | * Age * Gender * Income level * Geographical location |
| 1. Brand barriers may include but not limited to | * Competition * Company and brand positioning * Target customers * Timing * Internal spokespeople * Branding cost |
| 1. Market research may include but not limited to: | * Market size * Consumer behaviors * Consumer purchasing power * Consumer economic power |
| 1. Brand offering may include but not limited to: | * Characteristics * Benefits * Value proposition |
| 1. Brand persona may include but not limited to: | * Name * Logo * Packaging * Positioning * Name tagline |
| 1. Brand identity may include but not limited to: | * Logo * Key colors * Fonts * Typographic * Images * Additional color Pallette options * Packaging |
| 1. Brand visuals may include but not limited to: | * Logo * Colors * Fonts * Packaging |
| 1. Brand benefits may include but not limited to: | * Characteristics * Value proposition |
| 1. Key messages may include but not limited to: | * Tag lines * Vision statement * Mission statement * Core values * Motto |
| 1. Customer satisfaction measures may include but not limited to: | * Customer attitude * Customer loyalty * Service quality * Sales level * Margin level |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

* Product/service branding
* Content marketing strategy
* Brand communication
* Customer behavior
* Website management
* Data Analysis
* Research methods
* Sales and profitability ratios
* Brand positioning
* Strategic plan
* Goal setting
* Organization vision, mission, goals objectives and values
* Monitoring and evaluating
* Report writing
* Regulatory bodies
* Legal requirements

**SKILLS**

The individual needs to demonstrate the following skills:

* Creativity
* Analytical
* Communication
* Presentation
* Reporting
* Networking
* Collaboration
* Critical thinking
* Resource utilization

**EVIDENCE GUIDE**

This provides guidance on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   1. Determined brand purpose and audience 2. Determined brand objectives and timelines 3. Carried out brand market research 4. Analyzed and crushed brand barriers 5. Reassessed brand offering 6. Developed brand visuals 7. Analysed brand entity against competition 8. Identified critical brand benefits 9. Determined key messages 10. Reviewed communication content 11. Carried out customer satisfaction 12. Measured brand impact |
| 1. Resource Implications | The following resources must be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Written tests   2. Oral questioning   3. Third party reports   4. Case studies |
| 1. Context of Assessment | Competency may be assessed:   * 1. On the job   2. Off the job   3. During industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

# MANAGE MARKETING PROJECTS

**UNIT CODE:** BUS/OS/MKT/CR/8/6

**UNIT DESCRIPTION**

This unit specifies the competencies required to manage marketing projects. It involves initiating, planning, carrying out marketing project(s), monitoring and evaluating marketing project(s), Closing marketing projects and publicizing market project report.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Initiate marketing project(s) | * 1. ***Brand health*** is analyzed in accordance with sales target   2. ***Market share*** is reviewed in accordance with the category market share report   3. Marketing projects are identified in accordance with the marketing objectives   4. Priority projects are selected in accordance with marketing objectives   5. Marketing project objectives are determined in accordance with brand strategy |
| 1. Plan marketing project(s) | * 1. ***Project scope*** is determined in accordance with the marketing plan   2. ***Project team*** is selected in accordance with organizational policy   3. Roles are defined and assigned in accordance with project scope   4. Project activities are prepared in accordance with the Work Breakdown Structure (WBS)   5. Project timelines are defined in accordance with WBS   6. Project budget is prepared in accordance with WBS   7. Contingency plans are developed according to organizational policy and procedures   8. Project plan approval is carried out in accordance with project policy and procedures |
| 1. Carry out project implementation | 3.1 ***Resources*** are allocated in accordance with project budget  3.2 Outsourcing services ***is*** undertaken in accordance with project procedures  3.3Project staff are coordinated in accordance with HR Procedures  3.4 ***Deliverables*** are carried out in accordance with WBS |
| 1. Monitor and evaluate marketing project(s) | 4.1 Project progress is evaluated in accordance with WBS  4.2 Project variables are monitored in accordance with project plan  4.3 ***Project gaps*** are identified in accordance with project plan  4.4 Projects corrective actions are undertaken in accordance with project plan  4.5 Project progress report is updated in accordance with project procedures |
| 1. Close marketing project(s) | * 1. Project deliverables are verified in accordance with project plan   2. Procurement closure is carried out in accordance with Procurement policy and procedures   3. Marketing project closure report is presented for approval in accordance with project objectives   4. Resources are reassigned to respective departments in accordance with the organization policy |
| 1. Publicize marketing project report | 6.1 Project report is communicated in accordance with communications procedures  6.2 Project success is celebrated in accordance with marketing policy and procedures  6.3 ***Reward and recognition*** is carried out in accordance with marketing procedures  6.4 Project shortcomings are identified and evaluated and, appropriate remedial measures identified as per project objectives  6.5 Discrepancies between projected and actual budgets are tabulated and analysed as per financial regulations  6.5Feedback and ideas generated are evaluated in accordance with project review procedures |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

| **Variable** | **Range** |
| --- | --- |
| 1. Brand health may include but not limited to: | * Consumer loyalty * Consumer awareness * Consumer familiarity * Consumer endorsement |
| 1. Market share may include but not limited to: | * Purchasing frequency * Customer base * Sales growth * Value growth |
| 1. Project team may include but not limited to: | * Project manager * Programme coordinator * Finance staff * Procurement staff * Sales and marketing staff |
| 1. Project scope may include but not limited to: | * Timelines * Resources * Costs * Objectives * Deliverables |
| 1. Resources may include but not limited to: | * Human resource * Materials * Labour * Equipment * Technology * Funds |
| 1. Deliverables may include but not limited to: | * Sales target achievement * Brand health improvement * Market share increment * Brand visibility |
| 1. Project gaps may include but not limited to | * Overambitious scope * Limited resources * Unmotivated project team * Inadequate skills * Unrealistic timelines * Bureaucratic processes |
| 1. Reward and recognition may include but not limited to | * Bonuses * Certificate of recognition * Promotion * Letter of appreciation |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

* Project planning
* Risk management
* Resource mobilization
* Project costs and scheduling
* Project quality
* Project tools and techniques
* Corrective action plan
* Goal setting
* Project reporting
* Monitoring and evaluation
* Donor/Government Funding

**SKILLS**

The individual needs to demonstrate the following skills:

* Time management
* Leadership
* Team player
* Multitasking skills
* Decision maker
* Interpersonal relationship
* Analytical
* Communication
* Presentation
* Reporting
* Monitoring and evaluating
* Critical thinking
* Resource utilization
* Coordinator
* Hands on approach

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Analyzed brand health   2. Reviewed market share   3. Identified and selected priority projects   4. Determined marketing objectives   5. Determined project scope   6. Selected project team and assigned roles   7. Prepared project activity   8. Defined project timelines   9. Prepared project budget   10. Developed contingency plans   11. Allocated resources   12. Monitored and evaluated project   13. Carried out project closure   14. Prepared and publicized project report |
| 1. Resource Implications | The following resources must be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Written tests   2. Oral questioning   3. Third party reports   4. Case studies |
| 1. Context of Assessment | Competency may be assessed:   1. On the job 2. Off the job 3. During industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

# MANAGE INNOVATIONS/RENOVATIONS

**UNIT CODE:** BUS/OS/MKT/CR/9/6/A

**UNIT DESCRIPTION**

This unit specifies the competencies required to manage innovations/renovations. It involves carrying out market opportunity assessment, conducting conceptualization workshop, carrying out feasibility study, developing a prototype, launching final product and conducting post-launch evaluation.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Carry out market opportunity assessment | * 1. ***Industry landscape*** is reviewed in accordance with industry reports.   2. Market needs are identified in accordance with industry landscape.   3. Competition is assessed in accordance with industry and SWOT analysis reports.   4. Target audience is analyzed in accordance with marketing strategy   5. Market opportunity is identified in accordance with market needs analysis report. |
| 1. Conduct conceptualization workshop | * 1. Relevant **stakeholders** are identified in accordance with organization structure.   2. Workshop schedule is prepared in accordance with stakeholder calendar.   3. Stakeholder ideas are analysed in accordance with innovations procedures.   4. Big idea is identified in accordance with innovations selection criteria.   5. Conceptualization report is prepared in accordance with innovations procedure |
| 1. Carry out feasibility study. | 3.1 Alternatives are evaluated in accordance with stakeholders’ ideas.  3.2 **Market assessment** is carried out in accordance with industry reports.  3.3 **Technical and financial analysis** is carried out in accordance with organization reports.  3.3 Feasibility study findings are reported in accordance with innovations procedures.  3.4 Decision on feasible idea is made in accordance with financial analysis report |
| 4. Develop prototype | 4.1 **Prototype** objective is established in accordance with marketing strategy.  4.2 Prototype functionality is defined in accordance with innovations procedure.  4.3 Prototype is developed in accordance with defined functionality.  4.4 Prototype is tested in accordance with innovations procedure  4.5 Prototype feedback is evaluated in accordance with innovations procedure.  4.6 Prototype modifications are carried out in accordance with prototype feedback. |
| 1. Launch final product | 5.1 Final prototype is approved in accordance with innovations policy.  5.2 **Roll out plan** is prepared in accordance with innovations procedure.  5.3 Roll out budget is prepared and approved in accordance with budgetary procedures.  5.4 Final product is launched in accordance with Roll out plan. |
| 1. Conduct post launch evaluation | 6.1 Product feedback is gathered in accordance with innovations procedures.  6.2 Product feedback is evaluated in accordance with innovations procedures.  6.3 **Product renovation** is carried out in accordance with feedback report.  6.5 Renovated product is redeployed to the market in accordance with roll out plan.  6.6 Product optimization is maintained in accordance with renovation strategy. |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

| **Variable** | **Range** |
| --- | --- |
| 1. Industry landscape may include but not limited to: | * Market size * Competition * Risks * Regulations * Policies |
| 1. Stakeholders may include but not limited to: | * Internal * External |
| 1. Market assessment may include but not limited to: | * Market trends * Competition * Entry barriers * Risks * Demand |
| 1. Technical and financial analysis may include but not limited to: | * Technology * Resources * Revenue |
| 1. Prototype may include but not limited to: | * Product * Service * Process |
| 1. Roll out plan may include but not limited to: | * Activity calendar * Promotions * Route to market plan * Allocated budget |
| 1. Product renovation may include but not limited to: | * Product * Service * Process   (e.g. repackaging, distribution channels, rebranding) |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

* Technology Trends
* Patenting and licensing
* Collaborations and Partnerships
* Marketing Strategic Planning
* Research and development
* Policies and procedures
* Market needs and gaps
* Balance Score card analysis
* Basic procurement principles
* Tactical plans
* Corrective action plan
* Goal setting
* Organization vision, mission, goals objectives and values
* Monitoring and evaluating business operations
* Report writing
* Cost Benefit Analysis

**SKILLS**

The individual needs to demonstrate the following skills:

* Creativity
* Innovative
* Analytical
* Communication
* Presentation
* Reporting
* Monitoring and evaluating
* Critical thinking
* Resource utilization
* Technological
* Networking

**EVIDENCE GUIDE**

This provides guidance on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Reviewed industry landscape   2. Identified market needs   3. Identified market opportunities   4. Identified relevant stakeholders   5. Prepared innovations workshop schedule   6. Identified big idea   7. Carried out technical and financial analysis   8. Prepared a findings report   9. Established prototype objectives   10. Developed and tested prototype   11. Carried out prototype modification   12. Launched final product   13. Conducted post-launch evaluation   14. Carried out product renovation |
| 1. Resource Implications | The following resources must be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Written tests   2. Oral questioning   3. Third party reports   4. Case studies |
| 1. Context of Assessment | Competency may be assessed:   1. On the job 2. Off the job 3. During industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

# MANAGE DIGITAL MARKEETING

**UNIT CODE:** BUS/OS/MKT/CR/10/6/A

**UNIT DESCRIPTION**

This unit specifies the competencies required to manage digital marketing. It involves determine marketing objective, identify target audience, identifying digital marketing channel, managing content, monitoring and evaluating digital marketing plans.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Determine marketing objective | * 1. Conduct product/ service SWOT analysis as per marketing plan   2. Determine current product/service positioning as per marketing reports   3. Formulate strategy to market product/service based on marketing plan and the identified product/service strengths   4. Formulate improvement plan to address identified weaknesses as per organizational policies   5. Share strategy and improvement plan with relevant stakeholders |
| 1. Identify target audience | * 1. Consumer trends are assessed in accordance with market analysis report   2. Consumer geographical realities are specified in accordance with national census reports   3. Trend landscape and purchasing power is analyzed in accordance with industry reports   4. Key trade channels are identified in accordance with industry reports |
| 1. Identify digital marketing channel | * 1. Available digital media are identified in accordance with marketing industry reports   2. Goals/ objectives for using digital marketing channels are defined in accordance with market analysis reports   3. Digital marketing budget is prepared in accordance with the marketing plan and finance policies   4. Available personnel talent is identified in accordance with HR policies   5. Recommendations on the most suitable digital channel are made in accordance with marketing objectives |
| 1. Manage digital marketing content | * 1. Develop digital marketing information based on marketing policies   2. Assign marketing roles and responsibilities in accordance with HR policies and marketing strategy   3. Review digital marketing information/content in accordance with digital marketing objectives and, applicable laws and regulations |
| 1. Monitor and evaluate digital marketing plans | * 1. Data collection and assessment tools for evaluating digital marketing are developed in accordance with marketing procedures   2. Data collection and analysis for digital marketing effectiveness is conducted based on marketing and evaluation procedures   3. Recommendations are made on improvements of digital marketing strategy in accordance with marketing procedures   4. Recommendations are implemented and monitored as per organizational procedures |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

| **Variable** | **Range** |
| --- | --- |
| 1. Consumer trends may include but not limited to: | * Consumer behaviors * Purchasing/buying patterns * Social media posts |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

* Technology Trends
* Patenting and licensing
* Collaborations and Partnerships
* Marketing Strategic Planning
* Research and development
* Policies and procedures
* Market needs and gaps
* Balance Score card analysis
* Basic procurement principles
* Tactical plans
* Corrective action plan
* Goal setting
* Organization vision, mission, goals objectives and values
* Monitoring and evaluating business operations
* Report writing
* Cost Benefit Analysis

**SKILLS**

The individual needs to demonstrate the following skills:

* Creativity
* Innovative
* Analytical
* Communication
* Presentation
* Reporting
* Monitoring and evaluating
* Critical thinking
* Resource utilization
* Technological
* Networking

**EVIDENCE GUIDE**

This provides guidance on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Conducted product/ service SWOT analysis   2. Determined current product/ service market positioning   3. Formulated strategy to market product/ service based on marketing plan   4. Formulated improvement plan to address identified weaknesses/ gaps as per the SWOT analysis and marketing strategy   5. Assessed consumer trends   6. Specified consumer geographical realities   7. Analyzed trend landscapes   8. Identified key trade channels   9. Defined goals/ objectives for using digital marketing channel   10. Developed digital marketing budget   11. Identified available personnel talent   12. Developed and managed content for digital marketing   13. Developed and implemented data collection methods and assessment tools   14. Conducted data collection and analysis   15. Shared and implemented evaluation report recommendations |
| 1. Resource Implications | The following resources must be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Written tests   2. Oral questioning   3. Third party reports   4. Case studies |
| 1. Context of Assessment | Competency may be assessed:   * 1. On the job   2. Off the job   3. During industrial attachment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |