

Sales, marketing and procurement: Marketing

T Level outline content:

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Introduction

Outline content

This outline content is based on the same standards as those used for apprenticeships. The outline content will form the basis of the specifications for T Level Technical Qualifications, which will be developed by awarding organisations for approval by the Institute for Apprenticeships and Technical Education. One awarding organisation will be appointed to develop and deliver each Technical Qualification following a procurement process.

Colleges and other education and training providers will decide how to structure the T Level courses they offer, based on the qualification specifications. This will enable them to deliver the study programme's mandatory components in the most effective way for students.

A T Level programme consists of a Technical Qualification, substantial industry placement, English and maths, and other occupation-specific requirements where essential for entry to skilled employment. This outline content relates solely to the Technical Qualification part of a T Level programme.

Further information about T Levels is available on the website of the Institute for Apprenticeships and Technical Education here: www.instituteforapprenticeships.org, and at www.education.gov.uk.

Sales, marketing and procurement Route: Marketing

Awarding organisations will need to ensure that students have an up-to-date knowledge of the legal and regulatory obligations relating to employment in the occupations relevant to the T Level and understand the practical implication of these on their work.

Maths, English and digital skills are set out in a separate annex. Awarding organisations should integrate these within the qualification so that they are applied in occupationally relevant contexts.

Core content

The core content relates to the whole route 'route core', and the pathway that the Technical Qualification covers 'pathway core'. The core knowledge and understanding is assessed through an examination and core skills through a practical employer-set project.

The core knowledge and understanding focuses on the students' knowledge and understanding of contexts, concepts, theories and principles relevant to the T Level. This could include, where appropriate, assessment of knowledge and understanding relevant to the route and the pathway.

The employer-set project provides the opportunity to develop and apply a minimum range of core skills important for employability. The allocation of content to each type of assessment will need to be approved by the Institute for Apprenticeships and Technical Education.

Core knowledge and understanding across Sales, marketing and procurement Route

The Business Environment:

- The different types of organisations (e.g. private, public and not-for-profit) and the environments in which they operate both nationally and globally.
- The impact of organisations on society and the environment, including:
 - Economic growth and revenue and profit generation, locally, nationally and globally;
 - Social impact including:
 - Corporate Social Responsibility (CSR);
 - promoting equality and diversity;
 - social mobility;
 - ethical financing;
 - anti-slavery and human trafficking;
 - ethical working conditions;
 - wider environment including sustainability.
- Different forms of legal entities that organisations can form such as partnership, limited company, charity.
- How and why organisations set objectives including differing aims and objectives, for example financial, growth, reputation.
- How size, purpose and sector have an impact on organisations including:
 - Business models and structures
 - Operations and functions and how they work together including finance, marketing, sales, customer services, research and development, and IT.
- The different types of internal and external stakeholders (for example, trade unions, investors and shareholders) and customers and how their needs and priorities influence the way organisations operate.
- How current and emerging digital technologies impact on the way organisations operate and how this is changing; for example, Artificial Intelligence (AI), robotics and big data.
- Organisational cultures and values, how and why they vary, and how they are expressed externally and internally, for example:
 - Externally through branding and mission statements;
 - Internally through expectations of employees such as dress and behaviour codes.

Sustainability:

- The emerging green economy and the way it is creating and opportunities for new and complex services and products.

- Benefits of carrying out transactions or purchases for products within an environmentally sustainable model.

Communication:

- The different ways and channels through which organisations communicate internally and externally, for example, emails, intranet, press releases, social media.
- How to communicate including
 - purpose of communication
 - audience requirements
 - different forms of communication their advantages and disadvantages including non verbal, verbal and listening skills.
- How to convey messages including:
 - formats used for communication (e.g. reports, emails, letters, websites) and associated conventions
 - types and value of images and visual aids to support written text and oral presentations including their suitability for different purposes and audiences.
- How to negotiate, handle objections and close a sale
 - Scope of authority and responsibility
 - Negotiation planning
 - Documentation of a negotiated sale
 - Sales objections and appropriate responses
 - Customer needs and concerns
 - Questioning techniques
 - Verbal and non-verbal buying signals
 - How to summarise agreements.

Customer Journey:

- Customers and their importance to a business:
 - different types of customers and what influences their behaviours
 - how to manage the customer experience
 - why customer service is important
- Customer journey mapping including offline and digital touchpoints.
- Customer personas including purpose and typical types, for example competitive, spontaneous, analytical, and methodical.

- Sales lifecycle, funnels and pipeline including how to segment an audience for targeting.
- Understanding of the sales environment, techniques and processes.
- Meeting Customers' after-sales needs.

Marketing Principles:

- Role of marketing including marketing as a management process, its importance, market type and reach.
- Business aims including for profit and not for profit and marketing objectives.
- The marketing and promotional (advertising, personal selling, sales promotion public relations and direct marketing) mix including the differences between the channels and the benefits of a coordinated marketing mix in relation to:
 - Product mix
 - Price
 - Place
 - Promotion
 - People
 - Process
 - Product.

Project Management:

- The main project management approaches, their similarities and differences, and when and why they might be used (for example, Agile and Prince).
- How projects are defined, structured, monitored, reported on and measured depending on the project management methodology used.
- Project management tools for example social media, Gantt charts and project management software.
- How to support and improve projects through research, evidence and evaluation methods.
- Budgeting, scheduling and financial management.
- How to calculate and measure return on investment (ROI) and value for money, including where the application of financial values is difficult.

Technology:

An awareness of:

- Digital and emerging technology trends and associated benefits, risks of potential new services, for example authentic long-form content, chatbots and conversational AI, voice search, e-commerce, user experience, SEO and keywords.

- How the changes in technology and data or digital concepts can be used in the context of sales and marketing including contemporary digital tools and software packages that support day to day activities, for example stakeholder communications, development of briefs, presentations.

Regulatory Environment:

- Regulators, e.g. Advertising Standards Authority (ASA), Committee of Advertising Practice (CAP), Direct Marketing Association (DMA), Cinema Advertising Association (CAA), Market Research Society (MRS).
- Codes of practice, e.g. Committee of Advertising Practice (CAP) non-broadcast code, covering print and online and CAP broadcast code, covering TV and radio.
- General Data Protection Regulation (GDPR), Unfair Trading Regulations (CPRs) including, information storage, backup policies and procedures.
- Sanctions including local trading standards, broadcast and non-broadcast sanctions.
- Direct marketing and e-privacy including the need for prior permission and opt-out, telephone, email and mail preference service, acceptance of cookies.

Ethics:

- Ethical behaviours including:
 - Promotion of openness, honesty, fairness, and responsibility
 - Transparency, for example who is paid to endorse products
 - Fair treatment of consumers based on the nature of the product and the nature of the consumer, including young persons and children, and the impact on vulnerable consumers
 - Corporate and social responsibility (CSR) policy.
- How ethical behaviours impact on business operations, including interaction with stakeholders and the supply chain.

Employer-set project

The employer-set project ensures students have the opportunity to combine core knowledge and skills to develop a substantial piece of work in response to an employer-set brief. The employer-set project forms part of the Technical Qualification and is a separate part of the T Level programme to the Industry Placement.

To ensure consistency in project scope and demand, awarding organisations will develop assessment objectives, which require students to:

- plan their approach to meeting the brief
- apply core knowledge and skills as appropriate
- select relevant techniques and resources to meet the brief
- use maths, English and digital skills as appropriate
- realise a project outcome and review how well the outcome meets the brief

The awarding organisation will work with a relevant employer or employers, to devise a set brief that:

- ensures a motivating starting point for students' projects, for example, a real-world problem to solve
- ensures students can generate evidence that covers the assessment objectives
- is manageable for providers to deliver
- is officially approved by the awarding organisation and employer

For Marketing, in achieving the assessment objectives and meeting the brief, students must demonstrate the following core skills:

- **Communication** - use a range of communication methods tailored to audience
 - *e.g. a communication to internal and external stakeholders; a presentation to a customer*
 - *e.g. use contemporary digital software packages to present marketing or sales documentation*
- **Creative thinking**
 - *e.g. making connections and seeing relationships, exploring ideas, reflecting critically on ideas, actions and outcome*
- **Applying a logical approach to solving problems, identifying issues and proposing solutions**
 - e.g. through setting criteria for the successful implementation of a project
- **Working as part of a team**
 - e.g. managing and influencing stakeholders; working within the scope of own responsibility; supporting a positive customer journey
- **Reflective practice**
 - *e.g. review performance and own behaviours for impact; identify ways for improvement and quality outcomes*

Occupational Specialist Content

Specialist content is structured into different occupational specialisms, which correspond to the apprenticeship standards listed on the relevant occupational map. Occupational specialisms ensure students develop the knowledge and skills necessary to achieve a level of competence needed to enter employment in the occupational specialism, and are organised around 'performance outcomes' that indicate what the student will be able to do, as a result of learning and applying the specified knowledge and skills.

Occupational Specialism: Marketing

Performance Outcome 1: Apply research methods to acquire and analyse information to support marketing activities

Knowledge specific to Performance Outcome 1

Sources of knowledge

- Internal sources including the importance of confidentiality.
- External sources, e.g., from government agencies and private providers.
- Characteristics of reliable sources, e.g., accuracy, availability of references, acknowledgement of peer review.
- Fact, opinion and bias: what each means and the differences between them.

Research process, methods and design

- Research briefs including instructions, objectives, context, target audience, format of output.
- Research methods including the differences between qualitative and quantitative collection methods and how they are used.
- Design characteristics, e.g., descriptive, comparative.
- Primary and secondary research methods.

Data collection, handling and processing

- Purpose of data collection including its role in answering questions, making decisions and making predictions about future probabilities and trends.
- Formats including:
 - Those requiring future accessibility, for example, non-proprietary, open, with documented standards
 - Appropriate formats, for example, image, text, audio, database.
- Data manipulation including cleansing, blending and merging.
- Data analysis methods and techniques including quantitative (e.g., statistical, mathematical) and numerical (e.g., graphs, tables, charts and diagrams) and qualitative, e.g., themed.

Marketing environment and analysis

- Macro, micro and internal environment.
- Situational analyses including PESTLE, SWOT, Ansoff and Boston matrices.
- How market and competitor mapping can be used to identify gaps in the market.
- Porter's Five Forces.
- How suppliers and supplier chains affect the marketing environment.

Validation and presentation

- How to interpret findings from research including validity, reliability, limitations and how to draw conclusions
- Presentation methods for example graphical, tabular, reports, presentation software and including awareness of audience type.

Skills specific to Performance Outcome 1

- Identifies and sources suitable information for analysis.
- Uses appropriate primary and secondary research methods to gather information for marketing activities.
- Uses appropriate tools to gather information including survey tools, key word research tools and desktop research.
- Checks and verifies information to ensure it is complete, accurate, appropriate and of good quality.
- Presents research data to inform marketing decisions.
- Interprets research briefs.
- Assesses the validity of market research findings against its market research proposal.
- Presents market research findings in an appropriate format for the information obtained and target audience.

Performance Outcome 2: Support the planning and preparation of marketing campaigns

Knowledge specific to Performance Outcome 2

Marketing plans

- The principles underpinning the development of marketing plans.
- Characteristics, how a marketing plan is built and its purpose.
- The role of market segmentation in planning.

Marketing campaigns

- Purpose of marketing campaigns.
- Key factors that influence a marketing campaign.
- Objectives of marketing campaigns and how they relate to the wider business.
- Common marketing channels and how to operate an integrated campaign.
- Campaign management process including planning, budgeting, implementation and delivery.
- How internal stakeholders work to support the delivery of marketing campaigns.

Digital marketing and its impact

- Why and how business use digital marketing:
 - Digital tools and techniques
 - Social media
 - Email marketing
 - Affiliate marketing
 - Comparison websites
 - Search, rank and relevance.
- The impact of digital marketing on business and consumers.

Skills specific to Performance Outcome 2

- Contributes to the planning of campaigns across a variety of offline and digital media platforms.
- Plans marketing activity using marketing tactics that will acquire or retain for example, one or more customer segments using available resources.
- Identifies and uses technologies to achieve marketing objectives.

Performance Outcome 3: Source, create and edit content for marketing channels

Knowledge specific to Performance Outcome 3

Types of content

- Characteristics, features and purposes of for example, infographics, blog content podcasts, videos, social media and case studies.

Sourcing and selecting content

- Creating graphics including vector shapes, bitmap images, buttons, icons.
- Primary sources including writing copy, taking photographs, recording multimedia content.
- Secondary sources
 - libraries, stock sites, other people
 - copyright permissions
 - clearances including public domain, creative commons licences.
- Selecting assets
 - Selecting assets for a specific audience and purpose
 - Logging assets by, for example - name, size, file format, permissions.

Content creation

- Principles of design and copywriting
 - Purpose
 - Audience
 - Features and benefits
 - The art of persuasion including headlines, use of formula.
- Writing and editing text for readability, accessibility, proofreading.
- Adapting content for different mediums, for example print and web based.
- Website production including components of a web page, accessibility features for the web (scalability, alt text, assistive technology) and interactive content.
- Marketing design software used to create assets for print or digital platforms which may also include drawing, painting, image manipulation, video and audio editing software.
- Technical specification for example, platform selection, development environment(s), structure, navigation.

Quality Management

- Quality management processes including Quality Planning, Quality Assurance, Quality Control and Digital Asset Management.
- The maintenance of online and offline assets including
 - cataloguing in line with marketing regulations and legislation
 - sustainability of hard copy and digital campaigns
 - storage and organisation of marketing materials - asset management systems, recycling, the circular economy and energy consumption.

Skills specific to Performance Outcome 3

- Use software to design and create marketing assets to meet a technical specification.
- Use copywriting techniques to write persuasive text.
- Proofread marketing copy to identify errors, formatting issues, inconsistencies and to ensure persuasiveness.
- Organise offline and digital assets ensuring they are co-ordinated and legally compliant.
- Use a website content management system to publish text, images and video/animated content.

Performance Outcome 4: Plan and create communications to engage customers and stakeholders

Knowledge specific to Performance Outcome 4

Stakeholders

- The relationship between businesses and stakeholders including internal and external stakeholders and their objectives.
- The ways in which stakeholders can shape a business
- Qualities that are valued by stakeholders and customers, including integrity, reliability, self-motivation, being pro-active and a positive attitude.
- How to create a stakeholder map including identifying stakeholders, analysing stakeholders by perspectives, impact and influence.
- How to brief, manage and foster relationships with suppliers and partner organisations.
- The importance of securing stakeholder buy-in.

Customers and their importance to a business

- Influences on customer behaviour.
- Managing the customer experience.
- Customer service and its importance.

Conveying messages for marketing purposes

- How to plan, structure and adapt communications for appropriate external stakeholders and internal audiences including technical language, images and how they can support messaging, accuracy and timeliness.
- The impact that marketing has on the level of customer service and customer experience.
- Community management channels including the process of building an authentic community for customers, employees, and partners and the various types of interactions involved.
- How to use software tools to communicate with customers and stakeholders.
- Principles of copywriting.

Brand theory

- Principles of branding including positioning, value, identity, guidelines and tone of voice.
- Brand design.
- Brand as an asset including brand value, brand and customer equity, protecting

the brand.

- Benefits that branding can generate and its limitations.

Constraints and issues which affect the sharing, storing and use of information for marketing communications

- Legal frameworks and requirements
- Data acquisition and permissions;
- Correct use of data;
- Securing and protecting data using physical and electronic methods
- Ethical and security issues.

Skills specific to Performance Outcome 4

- Develops a stakeholder map for external or internal stakeholders.
- Engages and communicates with stakeholders through a variety of media.
- Constructs detailed and realistic plans for developing stakeholder relationships.
- Clearly communicates key messages in writing, digitally and orally including through presentations.
- Uses technology and software packages to support to support marketing communications, for example stakeholder communications, development of briefs, report writing, presentations.

Performance Outcome 5: Analyse and evaluate marketing delivery effectiveness

Knowledge specific to Performance Outcome 5

Marketing delivery effectiveness

- The importance of reviewing campaigns to ensure effectiveness and optimisation.
- Critical success factors in marketing including
 - Setting of targets and goals
 - Timescales
 - Engagement
 - Expenditure
 - Income generation.
- The different methods and metrics of measuring marketing effectiveness including:
 - basic measurement techniques for example observation, counting, estimating, surveys, interviews, voice of the customer, system generated data, monitoring software;
 - methods of assessment including digital, such as time series data, historical comparisons, benchmarking, competitor analysis.
- How measurement can be used to indicate change and improvement.

Resource management

- How to determine and manage resources and budgets, including people, equipment, materials, knowledge.
- Business tools used to measure the impact of business objectives, the wider environment, and sustainability on marketing activities.
- How to monitor budgets using tracking and reporting tools to ensure efficiencies and that costs do not overrun.

Skills specific to Performance Outcome 5

- Determines the resources needed to deliver against plan/ campaign.
- Uses appropriate statistical techniques for analysing different types of performance data correctly.
- Measures and evaluates marketing/campaign delivery to identify areas for improvement.
- Uses data analysis tools to record, interpret and analyse customer or campaign data.
- Identifies and justifies improvement options that will provide best return on investment.