Sales, marketing and procurement: Marketing

T Level outline content:

November 2022

Contents

Introduction

Outline content

This outline content has been produced by [T Level panels](#) of employers, professional bodies and providers, and 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

Element	Content
The Business Environment	- The different types of organisations (e.g. private, public sector and not-for-profit) including multinational and single entities, and the environments in which they operate both nationally and globally. - The impact of organisations on society and the external environment, including: o Economic growth and revenue and profit generation, locally, nationally and globally; o Social impact including: - Environmental Social Governance (ESG); - Sustainable Development Goals (SDG); - promoting equality and diversity; - social mobility; - ethical financing; - 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, e.g. financial, growth, reputation. - Operations and Business functions and how they work together including finance, sales, marketing and procurement, customer services, research and development, and IT. - How size, purpose, business lifecycle phase and sector have an impact on organisations including business models and structures. - The different types of internal and external stakeholders (e.g., employees, 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; e.g., Artificial Intelligence (AI), robotics and software as a service (SaaS).

Element	Content
	• Organisational cultures and values, how and why they vary, and how they are expressed externally and internally, e.g.: o Externally through branding and mission statements o Cross cultural o Internally through expectations of employees such as dress and behaviour codes.
Marketing	• The purpose of marketing, how it adds value to an organisation including leadership, culture and vision and the impact of no marketing activity. • Role of marketing including marketing as a management process, its importance, market type and reach. • The key differences between consumers and customers and the different ways to influence them. • Routes to market including the role of suppliers and procurement: business to business (B2B), business to consumer (B2C) and other channels, and how this influences marketing activity. • Customer personas and how they are used to determine marketing campaigns, o including purpose and typical types, e.g. competitive, spontaneous, analytical, and methodical. o Different types of customers and consumers and what influences their behaviours. • Organisational purpose and business aims including for profit and not for profit marketing objectives. • The marketing and extended promotional mix (advertising, personal selling, sales promotion, public relations and direct marketing) including the differences between the channels and the benefits of a coordinated marketing mix in relation to: • Product • Price • Place • Promotion • People • Process • Physical evidence.

Element	Content
Sales	- Understanding of customer needs, and how to link their needs to products and services. The techniques and processes to do so. - Core sale processes e.g. sales lifecycle, funnels and pipeline including how to segment an audience for targeting. - How marketing processes link with sales processes as part of a customer journey from awareness through to sales closure e.g. - business to customer (B2C): from marketing to consumer using paid, owned and earned channels through to sales conversion via digital Commerce or offline in a physical retail store - business to business (B2B): from advertising and lead generation to sales closure with customers at face to face meetings - not for profit: from awareness to donations made on line or at physical collection points - How to negotiate, handle objections and reach a conclusion - Scope of authority and responsibility - Negotiation planning - Documentation of a negotiated sale and purchase - Sales objections and appropriate responses - Customer needs and concerns - Questioning techniques - Verbal and non-verbal buying signals
Procurement	- The role of Procurement within an organisation including characteristics of regulations, policies and processes which must be followed, e.g., procedures for obtaining quotes and tenders, purchase order processing and purchase to pay. - Value for money concepts including the balancing of quality, price and sustainable considerations or most economically advantageous tender, whole lifecycle costing, five rights of procurement and added value opportunities. - Supplier approval process and the importance of due diligence checks including legal entity checks, financial appraisal, quality checks and the importance of relevant sector approvals, certification and policies. - The need for accurate specifications of requirements which reflect an organisation's needs and provides

Element	Content
	equality of opportunity for suppliers when providing quotes and tenders.
	• The legal and regulatory environment affecting procurement, including the supply of goods and services act and/or public contract regulations.
	• An awareness of an organisation's contractual obligations towards suppliers e.g. payment terms.
	• The four processes of negotiation (preparation, opening, bargaining and closure).

Customer Service	• Customers and their importance to a business:
	   o How to manage the customer experience
	   o Why customer service is important

	• Customer experience mapping including offline and digital touchpoints.
	• Meeting customers' after-sales needs.
Sustainability	• The emerging green economy and the way it is creating opportunities for new and complex services and products.
	• Benefits of carrying out transactions or purchases for products within an environmentally sustainable model.
	• Sustainability regulations, (e.g. the Environment Act 2021 and the Energy Act 2016), why they are important to business practices and the promotion of sustainability.
Communication	• The different ways and channels through which organisations communicate internally, externally and personally.

	• How to communicate effectively including
	   o Persuasion, influence
	   o Purpose and audience requirements
	   o Consistency
	   o Cultural context
	   o Different forms of communication their advantages and disadvantages including non verbal, verbal and listening skills.

	• How to convey messages including: o Communication formats (e.g. advertising, emails, social media, broadcast media) and associated conventions

Element	Content
	o Types and value of visual materials used to support written text and oral presentations including their suitability for different purposes and audiences o Basic office software including word processor, spreadsheet, presentation, database and collaboration. • The importance of internal communications, selling to the business and securing buy in.
Project Management	• An awareness of the main project management approaches, their similarities and differences, and when and why they might be used (e.g., Agile and Prince). • How projects are defined, structured, monitored, reported on and measured depending on the project management methodology used. • Project management tools e.g. Gantt charts and project management software and their role in measuring key performance indicators (KPIs). • How to support and improve projects through risk awareness, research, evidence and evaluation methods. • Budgeting, scheduling and financial monitoring. • How to calculate and measure return on investment (ROI), profit and loss 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, e.g. authentic long-form content, chatbots and conversational AI, voice search, e-commerce, user experience, metaverse, big data, 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, e.g. stakeholder communications, development of briefs, presentations.

Element	Content
	• Social media platforms and how they influence, how they can build a brand, increase sales, and drive website traffic. • Tools used to support sales lifecycle, funnels and pipeline including how to segment an audience for targeting.
Regulatory environment	• An awareness of the importance of being compliant and up to date within industry context and the risks and consequences of not being so. Current: • 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, Portman code, Advertising Standards Authority (ASA). • Data Protection Regulation, Unfair Trading Regulations (CPRs) including, information storage, backup policies and procedures. Sanctions including local trading standards, broadcast and non-broadcast sanctions. • Law related to Intellectual Property. • An awareness of the legal and regulatory environment affecting procurement, including the supply of goods and services act and/or public contract regulations.

Ethics	• Ethical behaviours including:
	    o Promotion of openness, honesty, fairness, and responsibility.
	    o Transparency, e.g. who is paid to endorse products.
	    o 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.
	
	 • How ethical behaviours impact on business operations, including interaction with stakeholders and the supply chain.

Element	Content
	• An awareness of the importance of substantiating claims and assertions with robust evidence.

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, e.g., 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, procurement 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	Skills specific to Performance Outcome

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 how to articulate the key question and intended objective(s), formulate instructions, objectives, context, identify target audience and 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
	• Interpret a brief, its objectives and scope.
	
	• Create a research brief including the articulation of a key question and intended objective(s).
	
	• Identify and source relevant and suitable internal and external information for analysis.
	
	• Use appropriate primary and secondary research methods to gather information for marketing activities.
	
	• Use appropriate tools to gather information including survey tools, key word research tools and desktop research.
	
	• Check and verify information to ensure it is complete, accurate, appropriate and of good quality.
	
	• Synthesise information from research activity.
	
	• Assess the validity of market research findings against its market research brief.

questions, making decisions and making predictions about future probabilities and trends.

- Formats including:
    - Those requiring future accessibility, e.g., non-proprietary, open, with documented standards
    - Appropriate formats, e.g., image, text, audio, database.
- Data manipulation including cleansing, blending and merging.
- Data analysis methods (including analytical tools) 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 e.g. PESTLE, SWOT, TOWS, Ansoff and Boston matrices.
- How market and competitor mapping can be used to identify gaps and diversity in the market.
- Porter's Five Forces.
- How suppliers and supplier chains affect the marketing environment.
- Quantifiable measures (Key Performance Indicators (KPIs) and how they are used to evaluate the market.

Validation and presentation
- How to interpret findings from research including validity, reliability, limitations and how to draw conclusions.
- Presentation methods e.g. graphical, tabular, reports,

- Present research insights to inform marketing decisions in an appropriate format for the information obtained and target audience.

presentation software including awareness of audience type.	

Performance Outcome 2: Assess customers and stakeholders

Knowledge specific to Performance Outcome	Skills specific to Performance Outcome
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.	• Develop a stakeholder map for external or internal stakeholders. • Engage and communicate with stakeholders through a variety of media. • Construct detailed and realistic plans for developing stakeholder relationships. • Communicate key messages in writing, digitally and orally including through presentations.

Performance Outcome 3: Develop and define propositions for marketing activities

Knowledge specific to Performance Outcome	Skills specific to Performance Outcome
Product • Benefits, features and functions of tangible and intangible products. • Enhanced products including delivery, warranty, customer service, installation, after-sales service. • Product and where a given product sits within a portfolio. • Product life cycle stages. **Price** • Factors that determine pricing strategy including product cost, competition, brand, marketing methods used, stage in the product lifecycle and potential demand. • Pricing strategies including value-based, competition-based, cost-plus, and dynamic pricing. • Relationship between cost, price and value. **Process** • Steps in the customer journey and how process can build a positive experience. • Processing orders - enquiry and response. • Methods of delivery. • Technology and its role in efficiency. **Brand and the marketing mix** • Principles of branding including positioning, value, identity, guidelines and tone of voice. • Brand design.	• Develop product communication(s) that appeal to targeted audiences. • Design and justify product pricing approach. • Prepare and present a customer journey process including relevant touchpoints. • Show how the power of brand influences product demand and personal impact. • Contribute to the planning of campaigns across a variety of offline and digital media platforms. • Plan marketing activity using marketing tactics that will acquire or retain e.g., one or more customer segments using available resources.

- Brand as an asset including brand value, brand and customer equity, protecting the brand.
- Benefits that branding can generate and its limitations.
- The importance of personal brand.

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

Performance Outcome 4: Deliver effective marketing communications

Knowledge specific to Performance Outcome	Skills specific to Performance Outcome

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.
• Marketing industries and agencies.
• Funnels
• The importance of identifying measurement and evaluation information when planning.
 	
Digital marketing and its impact
• Why and how business use digital marketing:
    o Digital tools and techniques
    o Social media
    o Email marketing
    o Affiliate marketing
    o Comparison websites
    o Search, rank and relevance
    o Digital advertising
    o Content marketing
    o Online communities
	• 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.
	
	• Identify and use technologies to achieve marketing objectives.
	
	• Use technology and software packages to support marketing communications, e.g. process workflow, product briefs, presentations.

- The impact of digital marketing on business and consumers.

Conveying messages for marketing purposes
- The importance of advocacy and social influencers.
- How to plan, structure and adapt communications for appropriate external 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 proof reading.
- Sales enablement.

Types of content
- Characteristics, features and purposes of e.g., infographics, blog content podcasts, videos, social media and case studies.

Sourcing and selecting content
- Creating visual materials.
- Primary sources including writing copy, taking photographs, recording multimedia content.
- Secondary sources.

- libraries, stock sites, third parties
- intellectual property rights
- clearances including public domain, creative commons licences.
- Selecting assets
  - Selecting assets for a specific audience and purpose
  - Logging assets by, e.g. - 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, e.g. mobile, video and voice recognition.
- Content production work flow and choices e.g. mobile first.
- Website production including components of a web page, accessibility features for the web 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 e.g., platform selection, development environment(s), structure, navigation.
- Selection of channel.

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. • Intellectual Property. **Quality Management** • Quality management processes including Quality Planning, Quality Assurance, Quality Control and Digital Asset Management. • The maintenance of online and offline assets.	

Performance Outcome 5: Analyse and evaluate marketing delivery effectiveness

Knowledge specific to Performance Outcome	Skills specific to Performance Outcome

Marketing delivery effectiveness
• The importance of reviewing marketing objectives to ensure effectiveness and optimisation.
• The different methods and metrics of measuring marketing effectiveness including:
    ○ Basic measurement techniques e.g. 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
    ○ Typical metrics including financial (expenditure and income generation)
• The importance of ongoing review of delivery effectiveness.
• How measurement can be used to indicate change and improvement.
 	
Resource management
• The importance of cost.
• 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
	• Determine the resources needed to deliver against plan/ campaign.
	
	• Use appropriate statistical techniques for analysing different types of performance data correctly.
	
	• Measure and evaluate marketing/campaign delivery to identify areas for improvement.
	
	• Use business analysis tools to record, interpret, analyse and collate customer or campaign data.
	
	• Identify and justify improvement options that will provide best return on investment.

tools to ensure efficiencies and that costs do not overrun. **Principles of marketing attribution** • Identification and evaluation of marketing touchpoints that a customer encounters on their buying experience.	