

## **Functional Map** (version 22)

This draft functional map is designed to prompt discussion regarding the functions and associated principal activities undertaken by marketing/marketing communications professionals within the marketing profession. This map is based upon the outcomes from the Occupational Mapping, a review of several in-house competency frameworks made available by various organisations and feedback from marketers participating within focus groups, and from organisations represented upon the Project Steering Group.

The Functional Map identifies the range of functions undertaken by marketing professionals across the private, public and voluntary sectors. The subsequent development of National Occupational Standards will then be informed by the functions identified.

### **Key purpose of marketing**

The key purpose of Marketing is to.....

*Advance the aims of organisations (whether private, public or voluntary) by providing direction, gaining commitment and achieving sustainable results and value through identifying, anticipating and satisfying stakeholder requirements.*

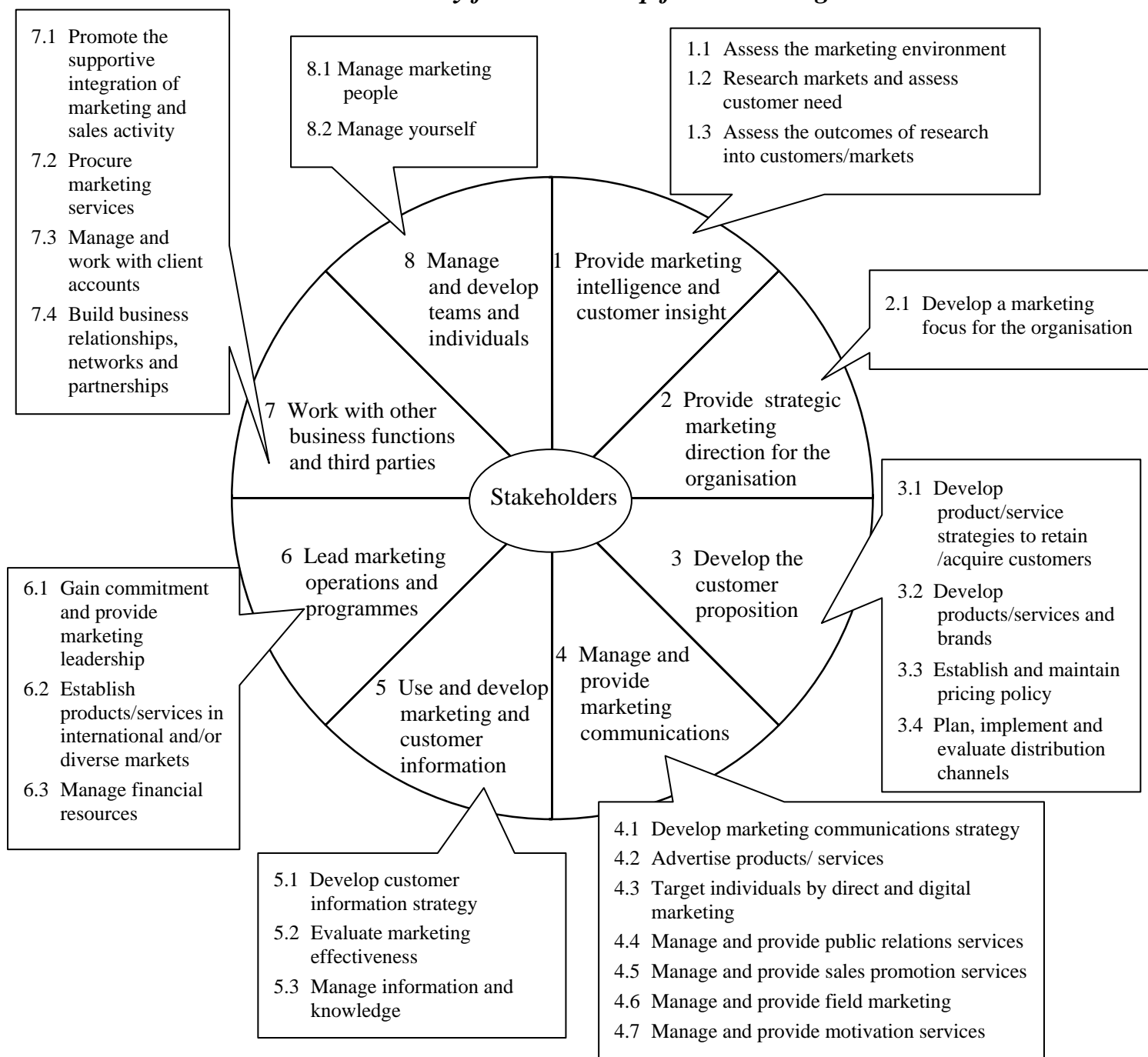
### **Summary map**

The following summary map identifies the functions and principal areas of activity undertaken in achieving this key purpose. Each area is then explored further in subsequent pages. The map reflects the key purpose and places the stakeholders, be they organisations' customers/target market and/or their various further publics, at the heart of the activities. It is therefore recognised that marketers are involved in addressing the requirements of a range of stakeholders involved in the organisation and its markets. As well as the ultimate consumers, these can include distributors/retailers, suppliers and also an organisation's shareholders.

The areas suggested are not proposed to be of equal size/complexity, as they reflect activities undertaken by individuals of varying levels of experience, responsibility and seniority. It is also recognised that many of the functions/activities are inter-related, such that the outcomes of one will impact upon another. Each area of activity represents a discrete unit of National Occupational Standards, with these Standards defining best practice in undertaking the activity described.

In addition, the areas are proposed as the full range of those undertaken by marketing/marketing communications professionals. However, it is not implied that such professionals will do all of the activities. Indeed, this is highly unlikely. Consultation has sought to establish those that are undertaken by all, and those that are undertaken by certain roles, levels or within certain organisations.

## *A summary functional map for Marketing*



With stakeholders at the heart of the activities, this diagram identifies eight first-level functions (as set out within the main circle) undertaken in achieving the key purpose. The numerical order is for convenience only, and does not imply a particular hierarchy. The second-level functions indicated in the surrounding boxes are those undertaken in achieving the relevant first-level function. In the following pages are identified those activities undertaken in achieving each of the second-level functions. These in turn have informed the development of units of National Occupational Standards (NOS).

## **Exploring the functional areas**

Each of the principal functional areas identified by the summary map is explored further below. Some of the activities identified appear within suites of units developed by other Standards Setting Bodies. Where this occurs, following the activity (or unit title) an abbreviation in brackets indicates the source Body of the unit. Where no reference is provided, this indicates a new activity/unit. Source Bodies, with their abbreviations, include:

- ICS = Institute of Customer Service,
- MSC = Management Standards Centre,
- Sales = Sales unit under development via a separate project being managed by the MSSSB.

## **1 PROVIDE MARKETING INTELLIGENCE AND CUSTOMER INSIGHT**

### **1.1 Assess the marketing environment**

#### ***1.1.1 Map organisations within their current and future marketing environment***

This is about undertaking a strategic assessment of an organisation's environment (competitive / demographic / economic / political / technological / attitudinal trends), objectives and strategies to identify potential opportunities and threats relevant to future marketing policy. It includes assessing the characteristics of the demand for the organisation's products/services and reviewing/auditing the organisation's strategic resources appropriate to delivering sustainable results.

#### ***1.1.2 Obtain feedback from existing customers, suppliers and others***

This is about establishing and implementing processes for obtaining ideas, information and insights from existing customers, suppliers and customer facing teams regarding an organisation's marketing proposition, products/services. It includes evaluating the feedback, assessing the benefits and any risks associated with possible options, and making recommendations towards enhancing the organisation's marketing proposition.

#### ***1.1.3 Identify and monitor competitors' marketing strategies and activities***

This is about monitoring key competitors' marketing activities and evaluating their potential implications for an organisation's products/services. It includes assessing the corresponding opportunities and threats, and recommending appropriate actions across the marketing mix to develop and/or protect an organisation's products/services.

## **1.2 Research markets and assess customer need**

### ***1.2.1 Define the need for market research***

This is about defining the aims and objectives for market research projects. It includes exploring the issues to be addressed and evaluating how research can inform a way forward.

### ***1.2.2 Design market research projects***

This is about developing market research proposals, including information requirements and research objectives with due consideration for the ultimate usage of the findings. It includes identifying and assessing different research methodologies and tools, identifying a sample which is appropriately representative of the population of interest, and recommending a market research plan with a methodology effective towards achieving the aims and objectives for the research.

### ***1.2.3 Implement programmes to collect market research data***

This is about implementing qualitative / quantitative market research programmes. It includes briefing those responsible for gathering data, and ensuring that the programmes follow relevant ethical guidelines.

### ***1.2.4 Collect market research data***

This is about collecting data using relevant market research methodologies and tools.

### ***1.2.5 Analyse market research data***

This is about analysing data (both qualitative and quantitative) from market research. It includes ensuring that data is handled appropriately, and selecting approaches to analysis which are appropriate to the research objectives.

## **1.3 Assess the outcomes of research into customers/markets**

### ***1.3.1 Evaluate and interpret findings and identify connections in complex data***

This is about evaluating research data, being creative in the analysis, and identifying patterns in both diverse and complex data, and drawing conclusions and making reasoned recommendations. Where appropriate, it includes evaluating the validity of the research results.

### ***1.3.2 Define the customer experience towards informing marketing strategy***

This is about building upon market and customer intelligence to develop understanding of customer experience, for example customer 'journeys' and key lifestyle events, and using this insight to inform how an organisation can develop product/service propositions and processes in meeting customer requirements.

### ***1.3.3 Establish and understand potential market segments***

This is about developing an understanding of potential market segments. It includes segmenting a market into distinct groups of customers and validating that the clusters identified are real and can be used to develop a market segmentation strategy.

### ***1.3.4 Establish target market segments for products/services and evaluate their potential***

This is about establishing a segmentation strategy for an organisation's products/services. It includes identifying those segments to be targeted based upon an evaluation of their potential and a reasoned review of the financial return forecast from the segments.

## **2 PROVIDE STRATEGIC MARKETING DIRECTION FOR THE ORGANISATION**

### **2.1 Develop a marketing focus for the organisation**

#### ***2.1.1 Develop an organisations' marketing strategy***

This is about developing a marketing direction and strategy for an organisation, addressing both the retention and acquisition of customers in line with corporate/financial objectives and business plan. It includes promoting understanding of the value that marketing can bring to the organisation, and positioning marketing as central to organisational strategy. It also includes considering optional strategies covering, for example, mergers/acquisitions and alliance/partner activities towards value creation, evaluating their relative benefits and assessing any associated risks – including balancing market, competitor, stakeholder and business risks.

#### ***2.1.2 Develop a marketing oriented organisation***

This is about instilling a culture of marketing within an organisation, where decisions are based around putting the customer first, and ensuring that an organisation's strategy and policies are centred upon marketing and its corporate social responsibilities. It includes ensuring that an organisation's vision, values, processes and systems are all driven by and geared to the desired image for the organisation and to the needs of its customers.

#### ***2.1.3 Demonstrate the value of marketing to the organisation***

This is about demonstrating the commercial importance of marketing to an organisation's success, both in the long term and also for the short/medium term. It includes demonstrating the value of marketing analysis in leading an organisation to develop a strategy which focuses resources upon appropriate customers, with a clear positioning message and products/services addressing the specific requirements identified.

## **3 DEVELOP THE CUSTOMER PROPOSITION**

### **3.1 Develop product/service strategies to acquire/retain customers**

#### ***3.1.1 Develop marketing strategies and plans for products and services***

This is about establishing marketing goals and objectives and establishing plans for their achievement across a portfolio of products/services in line with corporate aims. It includes developing strategies for the relevant elements of the marketing mix, relating these to their relevance in addressing identified strengths / weaknesses / opportunities and threats, and forecasting the return from such strategies. It also includes planning to make the best use of the existing customer base, and identifying opportunities for cross and up-selling.

### **3.2 Develop products/services and brands**

#### ***3.2.1 Establish requirements for product/services***

This is about identifying the opportunities and assessing the demand for new products /services based upon marketing intelligence and customer insights. It includes establishing a business case for their development and making a risk assessment of the opportunities based upon marketing intelligence.

#### ***3.2.2 Develop new products/services***

This is about contributing to the development of new products/services, and includes liaising with research and development teams, testing new product ideas, establishing and addressing packaging requirements, and planning and implementing appropriate market trials. It includes making practical assessments of the potential for identified new product opportunities.

#### ***3.2.3 Create and develop brand identity and characteristics***

This is about creating, protecting and building brand identity and characteristics. It includes selecting a brand that conveys the attributes, benefits and value of products/services, developing and implementing a brand strategy for individual and/or a range of products/services.

#### ***3.2.4 Develop and implement packaging requirements to fulfil marketing objectives***

This is about assessing and establishing packaging requirements for products/services that fulfil marketing objectives. It includes testing the packaging where required, and contributing to the identification of suppliers for the preferred packaging.

### **3.3 Establish and maintain pricing policy**

#### ***3.3.1 Establish and maintain pricing policy for products/services***

This is about establishing the pricing policy for products/services based upon overall marketing objectives, brand or products/services policy, and an assessment of relevant internal and external factors. It includes monitoring the effectiveness of the policy and refining it continually in line with the marketing strategy for the product/services and developments within the marketing environment.

#### ***3.3.2 Design and implement price promotions***

This is about designing and implementing price promotions, incentives and discounts, in line with overall pricing policy. Such incentives can be aimed at gaining distribution as well as motivating the purchase by the end-user. It includes monitoring and evaluating their effectiveness in promoting long term value to the business.

### **3.4 Plan, implement and evaluate marketing distribution strategy**

#### ***3.4.1 Develop a distribution strategy for products/services***

This is about developing a strategy for making products/services available to the consumer/end-user, (based upon analysis of customer service needs, distribution channel objectives, constraints and alternatives). It includes evaluating available channels of distribution and identifying those appropriate to achieving marketing objectives.

#### ***3.4.2 Develop a marketing distribution plan***

This is about developing a plan for the physical distribution of products/services. It includes identifying appropriate channel members.

#### ***3.4.3 Implement a marketing distribution plan***

This is about implementing a marketing distribution plan for products/services and contributing to the evaluation of the plan. It includes ensuring that channel members are clear regarding their roles, as well as monitoring their performance in achieving targeted levels of customer service within agreed budgets.

#### ***3.4.4 Motivate distribution channel members***

This is about developing effective business relationships and motivating channel members towards maximising an organisation's return on investment in the distribution of its products/services.

## **4 MANAGE AND PROVIDE MARKETING COMMUNICATIONS**

### **4.1 Develop marketing communications strategy**

#### ***4.1.1 Develop an understanding of the client***

This is about developing an in-depth understanding of the client, including the organisation's business aims overall, as well as marketing objectives. It involves developing a business relationship with key decision-makers and working towards creating a common, agreed agenda for future professional working.

#### ***4.1.2 Develop a marketing communications strategy and plans for products/services***

This is about developing an integrated marketing communications strategy and plans across the promotion mix. It includes identifying the target audience, objectives, message and media for all aspects of the promotional mix.

### **4.2 Advertise products/services**

#### ***4.2.1 Develop advertising strategy***

This is about identifying the role of advertising, setting advertising objectives, strategy and budget. It includes establishing 'where we are now', and 'where we want to be', establishing the optimum target audience (in terms of, for example, demographics, lifestyle, product usage, attitudes), product positioning and the marketing mix. It also includes identifying the advertising messages, considering and evaluating media options, selecting the appropriate advertising media, and selecting the measures for success.

#### ***4.2.2 Develop the creative product within advertising***

This is about creativity in developing creative concepts and ideas which capture the message to be conveyed. It includes exploring possible options and preparing a preferred campaign with supporting rationale, which is compliant with self regulation and is ethical.

#### ***4.2.3 Develop a media plan for advertising products/services***

This is about preparing a media plan in line with an agreed media strategy and which complements/enhances the creative solution.

#### ***4.2.4 Develop an advertising campaign***

This is about preparing proposals towards achieving agreed advertising strategy.

#### ***4.2.5 Negotiate and buy media space***

This is about negotiating media space and/or time in accordance with an agreed media strategy. It includes establishing that the space/time is available, buying the media space/time within agreed budgets and confirming the schedule.

#### **4.2.6 *Evaluate advertising***

This is about evaluating the communication effect of a campaign before and/or after it has run, according to pre-agreed measures of success.

### **4.3 *Target individuals by direct and digital marketing***

#### **4.3.1 *Create a direct marketing strategy and plan***

This is about establishing direct marketing objectives (based upon the target market, positioning and the marketing mix), strategy and budget. It includes identifying the appropriate direct marketing tools and the role required of direct marketing.

#### **4.3.2 *Develop direct marketing plans***

This is about developing direct marketing plans and associated budgets. It includes establishing and coordinating the messages to be communicated, agreeing the direct marketing media to be used, and piloting campaigns where required.

#### **4.3.3 *Implement door-drop marketing campaigns***

This is about planning and implementing a door-drop campaign. It includes the field management of those involved, and monitoring and evaluating the operation.

#### **4.3.4 *Market to customers using media-inserts***

This is about planning and implementing a direct marketing campaign using media-inserts to communicate to target customers. It includes planning, covering the testing and researching of the campaign, implementing the programme, and monitoring the outcomes.

#### **4.3.5 *Implement a direct-mailing marketing programme***

This is about planning and implementing a direct-mailing programme. It includes agreeing the objectives for the programme, including the selection criteria for the target market, planning and implementing the programme.

#### **4.3.6 *Develop and implement direct-response tools within advertising***

This is about developing and implementing methodologies and techniques for obtaining a response, and gathering the responses, within advertising campaigns, for example, those involving press, radio, television, posters and other outdoor media.

#### **4.3.7 *Execute direct mailing processes***

This is about the processes required for executing direct mail campaigns successfully. It includes the sorting, personalising, enclosing and despatch of mail, as well as the subsequent fulfilment of responses.

#### **4.3.8 *Market to target customers using digital / electronic media***

This is about using digital/electronic media (including on-line marketing and text messaging) to communicate with target customers.

#### **4.4 Manage and provide public relations services**

##### ***4.4.1 Conceptualise, map and track the organisation's role in society and business***

This is about working closely with the senior team of an organisation to set and achieve organisational objectives through the establishment of sustainable and supportive networks. This function addresses the organisation's 'licence' to operate, and includes understanding the organisation's role within society and developing its relations and communications policies among internal and external stakeholders, reinforcing the legitimacy of the organisation.

##### ***4.4.2 Develop a communications strategy to manage the organisation's corporate reputation***

This is about developing strategic direction in the management of an organisation's reputation. It includes setting the communications agenda, identifying opportunities and threats, prioritising the issues relating to these, building upon corporate ethics and governance, incorporating these into the organisation's policies and communicating the strategy to all stakeholders.

##### ***4.4.3 Build and manage stakeholder relationships***

This is about building and maintaining good relationships with all stakeholder groups so that mutual understanding, trust and goodwill result, through establishing clear and open two-way communication. It includes understanding and responding to the environment within which the organisation operates.

##### ***4.4.4 Co-ordinate communications functions and the dissemination of the organisation's communications***

This is about providing advice on strategic corporate direction, via liaison with other managerial departments such as policy, finance and personnel, to identify communications targets and outcomes so that specialist groups receive accurate communications in support of corporate objectives.

##### ***4.4.5 Manage business and political relationships and lobby for influence***

This is about building and maintaining strong working relationships with government, quangos, business and pressure groups so that in-coming and/or existing legislation is positive towards the organisation. This includes monitoring the socio-economic and political environments for issues and identifying risk, developing messages and targeting parties to be approached, and involvement in the decision-making process through the lobbying of these groups or individuals.

##### ***4.4.6 Manage financial public relations and investor relations***

This is about producing specialised information for investors and stakeholders. It includes using a variety of communications tools to achieve public relations objectives which are in line with corporate strategy, and requires understanding of financial and business environments.

#### ***4.4.7 Manage internal and external issues and risks, and meet organisational communications challenges***

This is about ensuring that the organisation is ready to meet communications challenges that may arise. It involves keeping the board and staff informed of developments within and without the organisation, and preparing contingency plans to prevent and/or resolve these challenges. It includes seeking to protect the organisation's corporate reputation in times of financial change such as mergers and acquisitions. It also includes boundary spanning, crisis management and conflict resolution.

#### ***4.4.8 Develop and implement proactive and reactive PR strategies and tactics***

This is about planning and co-ordinating the organisation's internal and external communications and ensuring the effective separation of roles within all group communications functions. It includes setting different objectives and projecting different outcomes for proactive and reactive PR. It involves determining which activities are best in any given situation and working with other marketing communications departments to deliver these actions.

#### ***4.4.9 Develop public relations strategies and tactics to promote products/services***

This is about designing public relations objectives, strategies and budgets for an organisation's products/services/brands in line with overall corporate strategy. It includes identifying the relevant public relation messages, the use of the appropriate public relations methods and marketing communications tactics for a selected audience and the evaluation of such public relations activity.

### **4.5 Manage and provide sales promotion services**

#### ***4.5.1 Develop a sales promotion strategy and plan***

This is about establishing sales promotion objectives, strategy and a budgeted plan for an organisation's products/services, (based upon the target market, positioning and marketing mix). It includes identifying appropriate sales promotion techniques and promotional marketing activity for consumers / trade (or retailers).

#### ***4.5.2 Manage sales promotion plans***

This is about managing the implementation of sales promotion plans in line with the sales promotion strategy. It includes coordinating the use of a variety of promotional marketing activities, (such as on-pack promotions, in-store promotions, direct marketing campaigns, brand experience activity) as well as contributing to the evaluation of sales promotion campaigns.

#### ***4.5.3 Implement sales promotion activity***

This is about implementing appropriate sales promotion techniques towards achieving promotional marketing objectives. It includes briefing and coordinating the various elements and suppliers involved in the promotional marketing campaigns, in line with agreed plans and budgets.

## **4.6 Manage and provide field marketing**

### ***4.6.1 Develop a field marketing strategy***

This is about establishing the field marketing objectives and strategy for an organisation's products/services. It includes assessing and selecting appropriate field marketing disciplines towards achieving the required objectives and return upon investment, and preparing proposals and associated budgets.

### ***4.6.2 Prepare an outline project plan for a field marketing activity***

This is about implementing, coordinating and developing a project plan to run the entire operation of a field marketing campaign. It includes covering all operational aspects, and ensuring that participants are aware of the aspects to be covered by the plan (including the legalities of insurances, employment law and third-party relationships/negotiations).

### ***4.6.3 Implement a field marketing activity***

This is about the detailed planning and subsequent implementation of a field marketing activity. It includes addressing the technologies to be used, collecting data, preparing reporting models, conducting analysis, and agreeing the return on investment sought. It also includes recruiting field marketers, covering their appointment, training/briefing and monitoring.

## **4.7 Manage and provide motivation services**

### ***4.7.1 Develop a business to business motivation strategy and plan***

This is about developing strategies and plans for the motivation and incentivising of company employees and/or distribution channel members. It includes carrying out 'Human Audits' and identifying appropriate motivation techniques directed at the trade (or retailers) and/or the sales force, or any other appropriate department or third party. It is likely to involve working closely with the Sales and Human Resource functions.

### ***4.7.2 Manage business to business motivation plans***

This is about managing the implementation of motivation plans in line with the motivation strategy. It includes coordinating the use of a variety of activities (such as incentive programmes, standards programmes, honours clubs, incentive travel and frequent buyer programmes) as well as contributing to the evaluation of the campaigns.

### ***4.7.3 Implement business to business motivation activity***

This is about implementing motivation techniques based upon the objectives to be addressed. It includes the effective briefing and coordination of the various elements and suppliers involved in motivation campaigns and doing so within the constraints of the agreed budget.

**5.1 Develop customer information strategy****5.1.1 *Develop a customer information strategy***

This is about developing a customer information strategy. It includes identifying the information priorities in line with marketing strategy and customer plans.

**5.1.2 *Implement a customer information strategy***

This is about implementing an agreed customer information strategy

**5.2 Evaluate marketing effectiveness****5.2.1 *Lead the monitoring and evaluation of marketing performance***

This is about promoting a culture in which the impact of marketing and marketing activities upon overall and sustained business success is monitored and evaluated. It includes working with other business disciplines to establish those measures which can be applied and have value, and thereafter applying these measures across the marketing function. Such measures might include customer lifetime value models, brand valuation, return on investment models, impact upon brand attributes, cross/up selling rates, post investment appraisals.

**5.3 Manage information and knowledge****5.3.1 *Develop and maintain a marketing database***

This is about contributing to the development and maintenance of a marketing database. It includes defining the applications for the database, eg for direct marketing, and the information required within it regarding individual customers (such as demographic, geographic, psychographic and transactional data covering recency, frequency and monetary value). The effectiveness of the database is maintained continually.

**5.3.2 *Use technology to achieve marketing aims***

This is about making the most effective and efficient use of technology. It includes being proactive in identifying technological developments relevant to your area of responsibility, and assessing their advantages and disadvantages. It also includes planning the use of new technology, implementing these plans, and evaluating the contribution that new technology has made towards achieving goals and objectives.

**5.3.3 *Use IT in managing marketing data***

This is about using IT effectively in identifying and presenting data appropriate for applications which, for example, could include preparing marketing/sales figures using a spreadsheet, or producing a brochure using word processing.

## **6.1 Gain commitment and provide marketing leadership**

### **6.1.1 *Put an organisation's marketing strategy into action***

This is about transforming an organisation's marketing strategy into action. It is also about developing and aligning an organisation's marketing processes and resources to achieve marketing objectives and plans. It includes implementing strategies and budgeted actions, gaining support for the strategy, motivating others to make their full contribution to its achievement, continuously reviewing and refining the strategy and recommending tactical responses to performance. It also includes promoting marketing best practices in line with the organisation's corporate ethics and social responsibility.

### **6.1.2 *Implement marketing strategies and plans for products/services***

This is about implementing marketing strategies and plans for an organisation's products/services. It includes preparing and implementing a budgeted action plan, and making tactical responses to performance and changes in circumstances. It also includes assessing the impact upon the long term value of the business.

### **6.1.3 *Develop and maintain a portfolio of products/services***

This is about developing and maintaining a portfolio of products/services, with regard to both shorter and longer term planning. It includes forecasting their demand and evaluating their potential through cost / benefit analyses to ensure that an organisation's marketing efforts are focused effectively. It also includes evaluating the most effective return on investment across a range of products/ services.

### **6.1.4 *Lead marketing/marketing communications teams***

This is about leading people to align their efforts with marketing/marketing communications plans. It includes gaining support for the plans, providing direction, inspiring and motivating people towards achieving the objectives and continuously reviewing and refining the plans.

### **6.1.5 *Lead and manage marketing projects***

This is about leading and managing marketing projects/programmes. It includes project management of marketing programmes, involving multi-disciplinary teams, by non-specialised project managers.

### **6.1.6 *Ensure effective marketing logistics systems***

This is about contributing to marketing logistics systems which realise agreed customer service levels, ensure that resources and skills are in place, as are necessary to maintaining the 'supply-chain' for the organisation's products/services. It includes working with the organisation's relevant further business functions.

**6.1.7 *Ensure marketing operations comply with legal, regulatory, ethical and social requirements***

This is about ensuring that the marketing operation works in ways that are consistent with the organisation's values and ethical principles and that marketing practices fulfil legal and regulatory requirements, including health and safety.

**6.1.8 *Fulfil the legal, regulatory and ethical requirements impacting upon your marketing activity***

This is about ensuring that you fulfil those legal, regulatory and ethical requirements which impact upon your own marketing/marketing communications activities. It includes keeping up to date with current legislation and codes of practice, and applying their requirements.

**6.2 *Establish products/services in international and/or diverse markets***

**6.2.1 *Assess marketing opportunities within international and/or diverse markets***

This is about assessing the marketing opportunities within international and/or diverse markets. It includes developing an understanding of appropriate trade systems, and the economic, political, legal and cultural environments within potential markets, and their implications for the distribution of an organisation's products/services.

**6.2.2 *Establish the business case and marketing plan for distributing products/services to international and/or diverse markets***

This is about establishing the business case and associated marketing plan for distributing products/services to international and/or diverse markets. It includes making an assessment of the market potential (covering such as demographic, geographic and economic issues, technology), and preparing a market entry strategy and plan addressing all relevant aspects of the marketing mix.

**6.2.3 *Implement and evaluate marketing plans for international and/or diverse markets***

This is about implementing and evaluating marketing plans for international and/or diverse markets. It includes working closely with the appropriate sales team (in-house and/or agents) to continually monitor, assess and refine the strategy and plans.

**6.3 *Manage financial resources***

**6.3.1 *Manage finance for an area of marketing operations***

This is about identifying and managing the funds needed to achieve marketing goals and objectives, and taking the relevant action to obtain these funds, drawing upon the expertise of financial specialists.

**6.3.2 *Manage a marketing budget (MSC E1)***

This is about having ownership of, and being responsible for a budget. It includes preparing, submitting and agreeing a budget for marketing plans, and monitoring and controlling the use of resources in line with the budget.

## **7 WORK WITH OTHER BUSINESS FUNCTIONS AND THIRD PARTIES**

### **7.1 Promote the supportive integration of marketing and sales activity**

#### ***7.1.1 Develop sales strategies and plans (Sales A2.2)***

This is about an integrated approach with sales teams to develop and agree sales strategies and plans for products/services. This includes the setting of objectives, both overall and by customer types, and agreeing sales approaches according to the customer buying process.

#### ***7.1.2 Build and deliver customer service and customer care support (Sales A9.4)***

This is about building and delivering customer service and customer care support toward developing and maintaining long term business relationships with key accounts. It includes developing plans towards working in partnership with the key accounts and thereby adding value to key accounts over and above the supply of products/services.

#### ***7.1.3 Build and retain effective sales relationships (Sales A9.2)***

This is about building key customer/account relationships.

#### ***7.1.4 Assist in the development of sales support and customer management programmes (Sales A9.5)***

This is about ensuring a high level of sales and customer services support to an organisation's customers.

#### ***7.1.5 Manage and assess ongoing financial viability of key customer relationships (Sales A3.5)***

This is about managing the financial performance of key customers.

#### ***7.1.6 Monitor and control relationship management activities (Sales A9.6)***

This is about monitoring and controlling customer relationships. It includes maintaining levels of service and initiating changes to products/services offered in order to meet the developing needs of key customers.

#### ***7.1.7 Monitor and solve customer service problems (ICS 4)***

This is about working with the sales and other business functions in dealing with problems that customers may have with products/services supplied by an organisation. It includes identifying customers' problems, developing solutions and agreeing these with customers, implementing the agreed solution and checking that problems have been resolved to customers' satisfaction.

## **7.2 Procure marketing services**

### **7.2.1 *Create a brief that captures the marketing proposition***

This is about defining the aims, objectives and budget for the promotion mix. It includes identifying the product/service proposition and the messages to be conveyed.

### **7.2.2 *Decide whether to buy in marketing/marketing communications services from external suppliers***

This is about taking decisions on whether services should be obtained from an internal or external source of supply, or a mix of such. It includes assessing and specifying the services required and deciding upon the potential sources of supply.

### **7.2.3 *Identify third party suppliers of marketing/marketing communications services***

This is about identifying and selecting appropriate third party suppliers of marketing services. Working with procurement services where necessary, it includes identifying possible sources, inviting tenders for specified requirements, assessing tenders, selecting appropriate proposals according to relevant criteria.

### **7.2.4 *Brief and work with third party suppliers of marketing/marketing communications services***

This is about selecting and working with third parties to achieve the agreed aims and objectives. It also includes monitoring the suppliers' compliance with contracts and the quality of services, evaluating the suppliers' performance and providing feedback.

## **7.3 Manage and work with client accounts**

### **7.3.1 *Provide marketing/marketing communications services to clients***

This is about working with clients to provide the products/services required, in line with their brief, and their marketing strategy and objectives. It includes developing and managing relationships and seeking opportunities to develop the business with the client.

## **7.4 Build business relationships, networks and partnerships**

### **7.4.1 *Develop productive working relationships with colleagues (MSC D1)***

This is about developing productive and effective relationships with colleagues at work, both within and also outside your own organisation. It includes understanding colleagues' interests, motivations and competences, agreeing respective roles, responsibilities, rights and expectations, fulfilling this agreement and reviewing continuously your relationships with colleagues.

#### **7.4.2 *Work with other business functions***

This is about working effectively with other business functions within the organisation towards realising your marketing goals and objectives, and promoting marketing as central to overall business strategy. It includes managing the interface with other functions, establishing shared business goals and the capabilities, roles, responsibilities, rights and expectations of each function. It also includes monitoring performance against mutual expectations and evaluating the effectiveness of the working relationships in achieving shared goals.

#### **7.4.3 *Develop personal networks (MSC A3)***

This is about developing your own personal networks to support both your current and future work. Your networks may include people both internal and external to the organisation. It includes defining the purpose of different personal networks based upon the principles of reciprocity, and taking proactive and reactive action to develop personal networks.

## **8 MANAGE AND DEVELOP TEAMS AND INDIVIDUALS**

### **8.1 *Manage marketing people***

#### **8.1.1 *Recruit, select and keep marketing colleagues (MSC D3)***

This is about recruiting and selecting the people that you need to achieve your marketing objectives. It includes identifying the people needed and their capabilities, recruiting them and taking appropriate actions to keep the people that the marketing function needs.

#### **8.1.2 *Plan the marketing workforce***

This is about planning the number and type of people who work within the marketing function. It includes considering the strategic plans for marketing and deciding whether the function should be expanding, maintaining or contracting its workforce. It also includes considering the mix of marketing people required.

#### **8.1.3 *Allocate and monitor work within marketing (MSC D6)***

This is about ensuring that work within your area of marketing is planned effectively and is allocated fairly to individuals and/or teams. It includes monitoring the progress and quality of work to ensure that the required standards are being met, and updating plans of work according to developments.

#### **8.1.4 *Provide learning opportunities for marketing colleagues (MSC D7)***

This is about being responsible for the development of colleagues. It includes promoting a learning culture so that colleagues take responsibility for their own learning, and are supported in this by the organisation. It also includes providing learning opportunities, including experiencing new roles and responsibilities.

### **8.1.5 *Encourage innovation (MSC C2)***

This is about encouraging and supporting the identification and practical implementation of ideas. The initial ideas will primarily come from people working for the organisation, although it is expected that ideas will be sought from beyond the organisation, and will include opportunities relating to new and existing products/services, and also practices, procedures, systems and ways of working.

## **8.2 *Manage yourself***

### **8.2.1 *Manage your own resources and professional development (MSC A2)***

This is about managing your personal resources (knowledge and understanding, skills, experience, time etc) and your professional development in order to achieve your work objectives and your career and personal goals. It includes understanding your work role and how it fits into the overall vision and aims of the organisation, whilst also understanding what is driving you in terms of your values and your career and wider personal aspirations. It also includes identifying and addressing gaps in your skills, knowledge and understanding.