

**REPUBLIC OF KENYA**

**NATIONAL OCCUPATIONAL STANDARD**

**FOR**

**MARKETING MANAGER**

**LEVEL 6**

**ISCED CODE: 0414 554A**

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# FOREWORD

Provision of quality education and training is fundamental to the Government’s overall strategy for socio-economic development. Quality education and training contribute to achievement focused on Kenya’s development blueprint and sustainable development goals.

Reforms in the education and training sector are necessary for achievement of Kenya Vision 2030 and meeting the provisions the Constitution of Kenya. The education sector had to be aligned to the Constitution and this resulted in formulation of the Policy Framework for Reforming Education and Training (Sessional Paper No. 1 of 2019). A key feature of this policy is the change in the design and delivery of TVET training. This policy document requires that training in TVET be competency based, curriculum development be industry led, certification be based on demonstration of competence and mode of delivery that allows for multiple entry and exit in TVET programs.

These reforms demand that Industry takes a leading role in curriculum development to ensure the curriculum addresses its competence needs. It is against this background that this Curriculum has been developed.

It is my conviction that this occupational standard will be used to develop a curriculum that will play a great role towards development of competent human resource for the marketing sector’s growth and sustainable development.

**PRINCIPAL SECRETARY**

**STATE DEPARTMENT FOR TVET**

**MINISTRY OF EDUCATION**

# PREFACE

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

The Technical and Vocational Education and Training Act No. 29 of 2013 and the Sessional Paper No. 1 of 2019 on Reforming Education and Training in Kenya, emphasized the need toreform curriculum development, assessment and certification. This called for a shift to CBET to address the mismatch between skills acquired through training and skills needed by industry as well as increase the global competitiveness of Kenyan labour force.

This curriculum has been developed in adherence to the Kenya National Qualification Framework and CBETA standards and guidelines. The curriculum is designed and organized into Units of Learning with Learning Outcomes; suggested delivery methods, training/learning resources and methods of assessing the trainee’s achievement. The curriculum is competency-based and allows multiple entry and exit to the course.

I am grateful to the NSSC, expert workers and all those who participated in the development of this curriculum.

# ACKNOWLEDGMENT

In developing this occupational standard, significant involvement and support was received from various organizations. We would like to thank the representatives from the human resource trades who provided technical assistance in the identification of the duties and tasks for the human resource officer and to thank the individual committee members who translated this information into a working document.

This occupational standard contains the occupational profile, list of duties, and the knowledge, skills and behaviors needed for someone to be competent in the occupation’s duties.

Special thanks to the Board of Directors and management of TVETA, KNQA, and MARKETING SOCIETY OF KENYA for supporting the process of developing this occupational standard.

I recognize with appreciation the role of the marketing industry officers in ensuring that competencies required by the industry are part of this occupational standard.

I also acknowledge any other institution or persons who in one way or another contributed to the success of development of this standard.

# ABBREVIATIONS AND ACRONYMS

| GIF | Graphic Interchange Format |
| --- | --- |
| DIME | Direct, Indirect, Mix & Everything in between |
| KPIs | Key Performance Indicators |
| KYC | Know Your Customer |
| UGC | Use Generated Content |
| ROI | Return on Investment |
| RtM | Route to Market |
| SOP | Standard operating procedures |
| SWOT | Strength, weaknesses, opportunities and threats |

# KEY TO UNIT CODE



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# OCCUPATIONAL STANDARD OVERVIEW

The Marketing Officer level 6 qualifications consist of competencies that an individual must achieve to enable him/her to conduct trade activities, conduct brand promotion, customer experience, conduct marketing communication activities, manage digital marketing, conduct market innovation/renovations, develop brand strategy, develop distribution channels, conduct market analysis, conduct promotional campaign, develop marketing budget.

**BASIC UNITS OF COMPETENCY**

|  |  |
| --- | --- |
| **Unit of Learning Code** | **Unit of Learning Title** |
| 0611 451 01A | Apply digital literacy |
| 0417 451 02A | Apply work ethics and practices |
| 0413 451 03A | Apply entrepreneurial skills |

**COMMON UNITS OF COMPETENCY**

|  |  |
| --- | --- |
| **Unit of Learning Code** | **Unit of Learning Title** |
| 0421 451 04A | Apply Principles of Commercial Law |
| 0411 451 05A | Apply financial accounting skills |
| 0413 451 06A | Apply Management Skills |
| 0588 451 07A | Carry out Business Mathematics and Statistics |
| 0311 451 08A | Apply Economics Principles. |
| 0413 451 09A | Undertake business communication |
| 0413 541 10A | Conduct research project |

**CORE UNITS OF COMPETENCY**

|  |  |
| --- | --- |
| **Unit Code** | **Unit Title** |
| 0414 451 11A | Conduct Trade Activities |
| 0414 451 12A | Conduct Brand Promotion |
| 0414 451 13A | Customer Experience |
| 0414 451 14A | Conduct Marketing Communication Activities |
| 0414 451 15A | Manage Digital Marketing |
| 0414 451 16A | Conduct Market Innovation/Renovations |
| 0414 551 17A | Develop Brand Strategy |
| 0414 551 18A | Develop Distribution Channels |
| 0414 551 19A | Conduct Market Analysis |
| 0414 551 18A | Conduct Promotional Campaign |
| 0414 551 19A | Develop Marketing Budget |

**BASIC UNITS OF COMPETENCY**

**APPLY DIGITAL LITERACY**

**UNIT CODE:** 0611 541 01A

**UNIT DESCRIPTION:**

This unit covers the competencies required to demonstrate digital literacy. It involves operating computer devices, solving tasks using the Office suite, accessing online/offline data and information, performing online communication and collaboration, applying cybersecurity skills, performing jobs online and applying job entry techniques.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes that make up workplace functions | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements  ***(Bold and italicized terms are elaborated in the range)*** |
| 1. Operate computer devices | * 1. C***omputer device*** usage is determined as per workplace requirements.   2. ***Computer hardware*** is identified according to job requirements.   3. ***Computer software*** is identified according to workplace requirements.   4. Computer devices are turned on or off as per the correct workplace procedure.   5. ***Mouse techniques*** are applied in solving tasks as per workplace requirements.   6. Keyboardtechniques are applied in solving tasks as per workplace requirements.   7. Computer files and folders are created and managed as per workplace requirements.   8. ***Internet connection option***s are identified and applied in connecting computer devices to the Internet.   ***External devices*** are identified and connected to the computer devices as per the job requirement. |
| 1. Solve tasks using Office suite | 1. ***Word processing concepts***are applied in solving workplace tasks as per job requirements. 2. Worksheet data is entered and prepared in accordance with work procedures. 3. Worksheet data is built and edited in accordance with workplace procedures. 4. ***Data manipulation*** on a worksheet is undertaken in accordance with work requirements. 5. Worksheets are saved and printed in accordance with job requirements.   ***Electronic presentation concepts***are applied in solving workplace tasks as per job requirements. |
| 1. Manage data and information | * 1. Office ***internet services*** are identified and applied in accordance with office procedures.   2. ***Internet access applications*** are determined in accordance with office operation procedures.   3. Internet search is performed as per job requirements.   4. Online digital content is downloaded in accordance with workplace requirements.   5. Digital content is identified and backed up in accordance with workplace procedures. |
| 1. Perform online communication and collaboration | * 1. Netiquette principles are observed as per work requirements.   2. Electronic mail communication is executed in accordance with workplace policy.   3. Digital content copyright and licenses are identified and applied according to workplace policies and regulatory requirements.   4. ***Online*** ***collaboration tools*** are applied in accordance with workplace policies and regulatory requirements. |
| 1. Apply cybersecurity skills | * 1. ***Data protection*** and ***privacy*** is classified in accordance with workplace policies and regulatory requirements.   2. ***Internet security threats*** are identified as per workplace policies and regulatory requirements.   3. Computer threats and crimes are detected in accordance to Information Management security guidelines   4. ***Cybersecurity control measures*** are applied in accordance with workplace policies and regulatory requirements. |
| 1. Perform online jobs | * 1. ***Online job platforms*** are identified as per the job requirements.   2. Online accounts and profiles are created in accordance with the work requirements.   3. Online jobs are identified according to the bidder’s skillset.   4. Online digital identity is managed according to industry best practices.   5. Online job bidding is done as per the specific job requirements.   6. Online tasks are executed according to the job requirements.   7. Personal online payment account is managed in accordance with financial regulations. |
| 1. Apply job entry techniques | * 1. ***Job opportunities*** are sought based on competencies.   2. A winning resume/CV is developed as per job advertisement.   3. An application/cover letter is developed based on the job advertisement.   4. ***Certificates and testimonials*** are organized as per resume.   5. ***Interview skills*** are demonstrated as per job advertisement. |

**RANGE**

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

|  |  |  |  |
| --- | --- | --- | --- |
| **Variable** | **Range** |  |  |
| * + - 1. Computer devices may include but are not limited to: | * Desktops * Laptops * Smartphones * Tablets * Smartwatches |  |  |
| 1. Computer hardware may include but are not limited to: | * The System Unit E.g. Motherboard, CPU, casing, * Input Devices e.g. pointing, keying, scanning, voice/speech recognition, direct data capture devices. * Output Devices e.g. hardcopy output and softcopy output * Storage Devices e.g. main memory e.g. RAM, secondary storage (Solid state devices, Hard Drives, CDs & DVDs, Memory cards, Flash drives * Computer Ports e.g. HDMI, DVI, VGA, USB type C etc. |  |  |
| 1. Computer software may include but are not limited to: | * System software e.g. Operating System (Windows, Macintosh, Linux, Android, iOS) * Application Software e.g. Word Processors, Spreadsheets, Presentations etc. * Utility Software e.g. Antivirus programs |  |  |
| 1. External devices may include but are not limited to: | * Printers * Projectors * Smart Boards * Speakers * External storage drives * Digital/Smart TVs |  |  |
| 1. Word processing concepts may include but are not limited to: | * Creating word documents * Editing word documents * Formatting word documents * Saving word documents * Printing word documents |  |  |
| 1. Mouse techniques may include but are not limited to: | * Clicking * Double-clicking * Right-clicking * Drag and drop |  |  |
| 1. Internet connection options may include but are not limited to: | * Mobile Networks/Data Plans * Wireless Hotspots * Cabled (Ethernet/Fiber) * Dial-Up * Satellite * ISDN (Integrated Services Digital Network) |  |  |
| 1. Data manipulation may include but are not limited to: | * Use of formulae * Use of functions * Sorting * Filtering * Visual representation using charts |  |  |
| 1. Electronic presentation concepts may include but are not limited to: | * Creating slides * Editing slides * Formatting slides * Applying slide effects and transitions * Creating and playing slideshows * Saving presentations   Printing slides and handouts |  |  |
| 1. Internet services may include but are not limited to: | * Communication Services * Information Retrieval Services * File Transfer * World Wide Web Services * Web Services * Directory Services * Automatic Network Address Configuration * Newsgroup * Ecommerce |  |  |
| 1. Internet access applications/software may include but are not limited to: | * Browsers * Email Apps * ecommerce Apps |  |  |
| 1. Online collaboration tools may include but are not limited to: | * Online Storage * Online productivity applications * Online meetings, * Online learning environments, * Online calendars * Social networks |  |  |
| 1. Data protection and privacy may include but not limited to: | * Confidentiality of data/information * Integrity of data/information * Availability of data/information |  |  |
| 1. Internet security threats may include but not limited to: | * Malware attacks * Social engineering attacks * Software supply chain attacks * Advanced persistent threats (APT) * Distributed denial of service (DDoS) * Man-in-the-middle attack (MitM) * Password attacks * IoT Attacks * [Phishing Attacks](https://onlinedegrees.sandiego.edu/top-cyber-security-threats/#phishing-attacks) * [Ransomware](https://onlinedegrees.sandiego.edu/top-cyber-security-threats/#ransomware) |  |  |
| 1. Security threats control measures may include but not limited to: | * Counter measures against cyber terrorism * Physical Controls * Technical/Logical Controls * Operational Controls |  |  |
| 1. Online job platforms may include but are not limited to: | * Remo task * Data annotation. tech * Cloud worker * Up work * One forma * Append |  |  |
| 1. Job opportunities may include but not limited to: | * Self-employment * Service provision * product development * salaried employment |  |  |
| 1. Certificates and testimonialsmay include but not limited to: | * Academic credentials * Letters of previous employments/ services rendered * Letters of commendation * Certifications of participation * Awards |  |  |
| 1. Interview skills may include but not limited to: | * Listening skills * Grooming * Language command * Articulation of issues * Body language * Time management * Honesty * Generally knowledgeable in current affairs and technical area |  |  |

**REQUIRED SKILLS AND KNOWLEDGE**

|  |  |
| --- | --- |
| **Required skills**   * Active listening * Keyboard Skills * Mouse Skills * Analytical skills * Creativity * Interpretation Skills * Communication * Spreadsheet operations (applying fundamental operations such as addition, subtraction, division and multiplication) * Computer Use Safety Skills * Document Editing Skills * Document Formatting Skills * Document Printing Skills * Netiquette Skills * Internet Browsing Skills * Problem Solving Skills * Online Collaboration Skills * Cybersecurity Skills * CV writing * grooming | **Required Knowledge**  The individual needs to apply knowledge of:   * Computer Hardware and Software Concepts * Computer Security Concepts (Data security and privacy) * Cyber security threats and control measures * Understanding Computer Crimes * Detection and protection against computer crimes * Laws governing protection of ICT in Kenya * Digital Identity Management * Netiquette Principles * Fundamentals of Copyright and Licenses * Word processing; * Functions and concepts of word processing; * Documents and tables creation and manipulations; * Document editing; * Document formatting; * Word processing utilities * Spreadsheets; * Meaning, types and importance of spreadsheets; * Components of spreadsheets; * Functions, formulae, and charts, uses and layout; * Data formulation, manipulation and application to cells; * Editing & formatting spreadsheets; * Presentation Packages; * Types of presentation Packages. * Creating, formulating, running, editing, printing and presenting slides and handouts * Networking and Internet; * Internet connectivity. * Browser and digital content management; * Managing data, information, and digital content * Electronic mail and World Wide Web * Fundamentals of Online Working; * Online Profile Management; * e-Portfolio Management; * Online Jobs Bidding; * Online Payment Systems; * Job entry techniques * Job searching sites * Interview preparation skills * Interview handling |

**REQUIRED RESOURCES**

|  |  |
| --- | --- |
| **Required Tools &Equipment**   * Computer * Projector * Smart board * Computer software’s * Training halls * Smart phone | **Required Materials and Supplies**   * Stationery * Reference materials (Library) * Brochures/fliers * Website landing page * Logo branded materials * Social media graphics * Email marketing campaigns * Event posters/banners |

**EVIDENCE GUIDE**

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

| 1. Critical aspects of competency | ***Assessment requires evidence that the candidate:***   * 1. Operated computer devices as per workplace policies and regulations.   2. Solved tasks using the office suite as per workplace policies and regulations.   3. Manage data and information as per workplace policies and regulations.   4. Performed online communication and collaboration as per workplace policies and regulations.   5. Applied cybersecurity skills in accordance with workplace policies and regulations.   6. Executed online tasks according to the job requirements.   7. Searched for job opportunity based on competencies.   8. Prepared job requirement documentations based on job opportunity.   9. Demonstrated interview skills based on the job opportunity. |
| --- | --- |
| 1. Resource implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant work environments where assessment can take place.   3. Resources relevant to the proposed activities or task. |
| 1. Methods of assessment | Competency in this unit may be assessed through:   * 1. Observation   2. Oral assessment   3. Portfolio of evidence   4. Interviews   5. Third party report   6. Written assessment   7. Practical assessment   8. Projects |
| 1. Context of assessment | Competency may be assessed:   * 1. Workplace or simulated workplace. |
| 1. Guidance information for assessment | * 1. Holistic assessment with other units relevant to the industry sector and workplace job role is recommended. |

**APPLY WORK ETHICS AND PRACTICES**

**UNIT CODE:** 0417 451 02A

**UNIT DESCRIPTION**

This unit covers competencies required to effectively apply work ethics and practices. It involves the ability to: conduct self-management, promote ethical work practices and values, promote teamwork, manage workplace conflicts, maintain professional and personal development, apply problem-solving and promote customer care.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function. | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in Range*** |
| * 1. Apply self-management skills | * 1. Personal vision, mission and goals are formulated based on potential and concerning organization objectives and strategic plan  1. Self-esteem and a positive self-image are developed and maintained based on value 2. Emotional intelligence and stress management are demonstrated as per workplace requirements. 3. Assertiveness is developed and maintained based on the requirements of the job. 4. Accountability and responsibility for one's actions are demonstrated based on workplace instructions. 5. Time management, attendance and punctuality are observed as per the organization’s policy. 6. Personal goals are managed as per the organization’s objective 7. Self-strengths and weaknesses are identified based on personal objectives 8. Motivation, initiative and pro activity are utilized as per the organization policy 9. Individual performance is evaluated and monitored according to the agreed targets. |
| 1. Promote ethical work practices and values | 1. Integrity is demonstrated as per acceptable norms 2. Codes of conduct is applied as per the workplace requirements 3. Policies and guidelines are observed as per the workplace requirements 4. Professionalism is exercised in line with organizational policies |
| 1. Promote Team work | * 1. ***Teams*** are formed to enhance productivity based on organization’s objectives   2. Duties are assigned to teams under the organization policy.   3. Team activities are managed and coordinated as per set objectives.   4. Team performance is evaluated based on set targets as per workplace policy.   5. ***Conflicts*** are resolved between team members in line with organization policy.   6. Gender and diversity-related issues are identified and mainstreamed in accordance with workplace policy.   7. Healthy ***relationship***s are developed and maintained in line with the workplace.   8. Adaptability and flexibility are applied in dealing with team members as per workplace policies |
| 1. Maintain professional and personal development | * 1. ***Personal growth and development*** needs are identified and assessed in line with the requirements of the job.   2. Training and career opportunities are identified and utilized based on job requirements.   3. Resources for training are mobilized and allocated based on organizations and individual skills needs.   4. Licenses and certifications relevant to the job and career are obtained and renewed as per policy.   5. Recognitions are sought as proof of career advancement in line with professional requirements.   6. Work priorities and personal commitments are balanced and managed based on the requirements of the job and personal objectives.   7. Dynamism and on-the-job learning are embraced in line with the organization’s goals and objectives. |
| 1. Apply Problem solving skills | * 1. ***Creative, innovative*** and practical solutions are developed based on the problem   2. Independence and initiative in identifying and solving problems are demonstrated based on the requirements of the job.   3. Team problems are solved as per the workplace guidelines   4. Problem-solving strategies are applied as per the workplace guidelines   5. Problems are analyzed and assumptions tested as per the context of data and circumstances |
| 1. Promote Customer Care | * 1. Customers' needs are identified based on their characteristics   2. Customer feedback is allowed and facilitated in line with organization policies.   3. Customer concerns and complaints are analyzed and resolved in line with the set organizational culture.   4. Proactive customer outreach programs are implemented as per organizational policies   5. Customer retention strategies are developed and implemented in line with the organizational policy |

**RANGE**

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

| **Variable** | **Range** |
| --- | --- |
| 1. Feedback may include but not limited to: | * Verbal * Written * Informal * Formal |
| 1. Conflicts include but are not limited to: | * Interpersonal Conflict. * Interpersonal Conflict. * Inter group Conflict. * Intra group Conflict. |
| 1. Relationships may include but not limited to: | * Man/Woman * Trainer/trainee * Employee/employer * Client/service provider * Husband/wife * Boy/girl * Parent/child * Sibling relationships |
| 1. Team may include but not limited to: | * Small work group * Staff in a section/department * Inter-agency group * Virtual teams |
| 1. Personal growth may include but not limited to: | * Growth in the job * Career mobility * Gains and exposure the job gives * Net workings * Benefits that accrue to the individual as a result of noteworthy performance |
| 1. Personal objectives may include but not limited to: | * Long term * Short term * Broad * Specific |
| 1. Training and career opportunities may include but not limited to | * Participation in training programs * Serving as Resource Persons in conferences and workshops * Capacity building |
| 1. Resource may include may but not limited to: | * Human * Financial * Technology |
| 1. Creative and innovative may include but not limited to: | * New ideas * Original ideas * Different ideas * Methods/procedures * Processes * New tools |
| 1. Emerging issues may include but not limited to: | * Artificial Intelligence * Data confidentiality * National cohesion * Open offices |

| **REQUIRED SKILLS AND KNOWLEDGE** | |
| --- | --- |
| **Required skills**   * Work values and ethics * Company policies and procedures * Company operations, procedures and standards * Flexibility and adaptability * Concept of time and leisure time * Decision making * Work planning * Organizing work * Monitoring and evaluation * Record keeping * Gender and diversity mainstreaming * Drug and substance abuse * Professional growth and development * creativity * Innovation * problem solving * customer care * mentoring and coaching. * Emerging issues | **Required Knowledge**   * Active listening * Critical thinking * Organizational * Negotiation * Monitoring * Evaluation * Problem solving * Decision Making * Leadership * Creative/innovative thinking * Adaptability * Conflict management * Emotional intelligence * Teamwork |

**EVIDENCE GUIDE**

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

| 1. Critical aspects of Competency | Assessment require evidence that the candidate:   * 1. Applied self-management skills as per organizational procedures.   2. Promoted ethical practices and values as per organizational procedures.   3. Promoted Teamwork as per workplace assignments.   4. Maintained professional and personal development as per organizational procedures.   5. Applied Problem-solving skills based on work requirements.   6. Identified customer needs based on their characteristics.   7. Gave back Customer feedback in line with organization policies. |
| --- | --- |
| 1. Resource Implications | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place. 3. Resources relevant to the proposed activity or tasks. |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   1. Observation 2. Oral questioning 3. Written test 4. Portfolio of Evidence 5. Interview 6. Third party report |
| 1. Context of Assessment | Competency may be assessed:   1. On-the-job 2. In a simulated work environment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**APPLY ENTREPRENEURIAL SKILLS**

**UNIT CODE: 0413 451 03A**

**UNIT DESCRIPTION**

This unit covers the competencies required to demonstrate an understanding of entrepreneurship. It involves demonstrating an understanding of financial literacy, applying entrepreneurial concepts identifying entrepreneurship opportunities, applying business legal aspects, developing business innovative strategies, and developing business plans.

|  |  |
| --- | --- |
| **ELEMENTS AND PERFORMANCE CRITERIAELEMENT**  These describe the key outcomes that make up workplace function. | **PERFORMANCE CRITERIA**  These are assessable statements that specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in Range*** |
| * + - 1. Apply Financial Literacy Skills | * 1. **Sources of personal and business** ***funds*** are identified as per financial procedures and standards  1. Personal finances are managed as per financial procedures and standards 2. Savings are managed as per financial procedures and standards 3. Debts are managed as per financial procedures and standards 4. Investments are undertaken as per financial procedures and standards 5. Insurance services are procured as per financial procedures and standards |
| 1. Apply entrepreneurial concept | 1. Entrepreneurs and Business persons are distinguished as per principles of entrepreneurship 2. ***Types of entrepreneurs*** are identified as per principles of entrepreneurship 3. Ways of becoming an entrepreneur are identified as per principles of Entrepreneurship 4. ***Characteristics of Entrepreneurs*** are identified as per principles of Entrepreneurship 5. Salaried employment and self-employment are distinguished as per principles of entrepreneurship 6. ***Requirements for entry into self-employment*** are identified according to business procedures and standards 7. Roles of an Entrepreneur in an enterprise are determined according to business procedures and standards   **Contributions of entrepreneurship** to National development are identified as per business procedures and standards |
| 1. Identify entrepreneurial opportunities | 1. Business ideas are identified as per business procedures and standards 2. Factors to consider when evaluating business opportunity viability are explored based on business procedure and standards 3. Entrepreneurial opportunities are evaluated as per business procedures and standards 4. Business ideas and opportunities are generated as per business procedures and standards 5. Business life cycle is analyzed as per business procedures and standards |
| 1. Apply business legal aspects | 1. ***Forms of business ownership*** are identified as per legal procedures and practices 2. Business Registration and Licensing processes are identified as per legal procedures and practices 3. Types of Contracts and Agreements are analyzed as per legal procedures and practices 4. Employment Laws are identified as per legal procedures and practices 5. Taxation laws are identified as per legal procedures and practices |
| 1. Innovate Business strategies | 1. Business innovation strategies are determined by the organization standards 2. Creativity in business development is demonstrated in accordance with business standards 3. ***Innovative business standards*** are developed as per business principles 4. Linkages with other entrepreneurs are created as per best practice 5. ICT is incorporated in business growth and development as per best practice |
| 1. Develop Business Plan | 1. Business idea is described as per business procedures and standards 2. Business description is developed as per business plan format 3. Marketing plan is developed as per business plan format 4. Organizational/Management plan is prepared in accordance with business plan format 5. Production/operation plan is prepared in accordance with business plan format 6. Financial plan is prepared in accordance with the business plan format 7. Executive summary is prepared in accordance with business plan format 8. Business plan is presented as per best practice 9. Business ideas are incubated as per institutional policy. |

**RANGE**

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

|  |  |
| --- | --- |
| **Variable** | **Range** |
| * + - 1. Sources of personal funds mayinclude but not limited to: | * Salary/Wages * Investments * Savings * Inheritance * Government Benefits |
| * + - 1. Sources of business finance mayinclude but not limited to: | * Equity Financing * Debt Financing, * Personal Savings/Investment * Retained Earnings * Grants and Subsidies * Crowdfunding * supplier Credit: * Leasing and Asset Financing: |
| * + - 1. Types of entrepreneurs may include but not limited to: | * Innovators * Imitators * Craft * Opportunistic * Speculators |
| * + - 1. Characteristics of Entrepreneurs may include but not limited to: | * Creative * Innovative * Planner * Risk taker * Networker * Confident * Flexible * Persistent * Patient * Independent * Future oriented * Goal oriented |
| * + - 1. Requirements for entry into self-employment may include but not limited to | * Technical skills * Management skills * Entrepreneurial skills * Resources * Infrastructure |
| * + - 1. Forms of businesses ownership may include but not limited to: | * Sole proprietorship * Partnership * Limited companies * Cooperatives |
| * + - 1. Innovative business standards may include but not limited to: | * New products * New methods of production * New markets * New sources of supplies * Change in industrialization |

**ENABLERS**

**REQUIRED SKILLS AND KNOWLEDGE**

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

**EVIDENCE GUIDE**

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

|  |  |
| --- | --- |
| Critical Aspects of Competency | Assessment requires evidence that the candidate:   1. Identified Sources of personal and business finance as per financial procedures and standards 2. Managed Personal finances as per financial procedures and standards 3. Made Investment decisions as per financial procedures and standards 4. GeneratedBusiness ideas and opportunities based on business procedure and standards 5. Analysed business life cycle based on business procedure and standards 6. Determined business innovative standards as per business principles 7. Developed and presented a business plan as per regulatory framework. |
| Resource Implications | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| Methods of Assessment | Competency may be assessed through:   1. Written tests 2. Oral questions 3. Third party report 4. Interviews 5. Portfolio |
| Context of Assessment | Competency may be assessed:   1. On-the-job 2. In a simulated work environment |
| Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**COMMON UNITS OF COMPETENCY**

**APPLY PRINCIPLES OF COMMERCIAL LAW**

**UNIT CODE:** 0421 451 04A

**UNIT DESCRIPTION**

This unit specifies the competencies required to apply principles of commercial law; It involves demonstrating an understanding of nature of law, Illustrating the structure of court system in Kenya, applying law of tort, law of contract, law of sale of goods, hire purchase contracts, law of agency, law of negotiable instruments, the law of insurance and the law of property.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| 1. Demonstrate understanding nature of law | * 1. Nature of law is determined as per common law.   2. purpose of law is identified as per common law   3. ***Sources of law in Kenya*** are identified as per Judicature Act   4. Law is classified as per Kenyan law. |
| 1. Illustrate court structure system in Kenya | 2.1 Court structure is determined as per constitution of Kenya, 2010.  2.2 Composition of ***Kenyan courts*** are determined as per the constitution of Kenya, 2010.  2.3 Jurisdiction of courts is determined as per the constitution of Kenya, 2010. |
| 1. Apply Tort law | * 1. Nature of tortuous liability is explained as per the law of tort.   2. Tort, crime and breach of contract are differentiated as per the law of tort.   3. Capacity to sue/ sued is determined as per the law of tort.   4. ***Types of torts*** are identified as per law of torts.   5. General defenses in tort are identified as per the law of tort. |
| 1. Apply Contract law | * 1. Essentials of a valid contract are identified as per the law of contract.   2. Types of contracts are determined as per the law of contract.   3. Methods of discharging contract are identified as per the law of contract.   4. Remedies of breach of contract are determined as per the law of contract |
| 1. Apply Agency law | * 1. Agents are classified as per the law of agency.   2. Agents’ authority is established as per the law of agency.   3. Duties of agents are identified as per law of agency.   4. Rights of agents are identified as per law of agency.   5. Methods of terminating agency are determined as per law of agency. |
| 1. Apply sale of goods law | * 1. Sale and agreement to sell are differentiated as per sale of goods Act 2015.   2. Capacity to buy and sell is determined as per sale of goods Act 2015.   3. ***Terms of sale of goods*** are determined as per sale of goods Act 2015.   4. Doctrine of caveat emptor is determined as per sale of goods Act 2015.   5. Factors affecting transfer of title are determined as per sale of goods Act 2015.   6. Rights of parties are identified as per sale of goods Act 2015.   7. Auction process is determined as per the sale of goods Act 2015 |
| 1. Apply hire purchase contracts | * 1. Nature of hire purchase agreement is determined as per hire purchase Act 2017   2. Hire purchase agreement is registered as per hire purchase Act 2017   3. Conditions of terminating hire purchase agreement are determined as per hire purchase Act 2017   4. Completion of hire purchase agreement is determined as per hire purchase Act 2017 |
| 1. Apply negotiable instruments law | * 1. ***Negotiable instruments*** are identified as per negotiable instrument Act 2018   2. Characteristics of negotiable instrument are identified as per negotiable instrument Act 2018   3. Negotiable instruments are distinguished as per negotiable instrument Act 2018 |
| 1. Apply insurance law | * 1. Insurance contracts are identified as per insurance Act 2020 laws of Kenya   2. ***Insurance principles*** are analyzed based on insurance Act 2020 laws of Kenya   3. Insurance contracts are formed as per the organizational requirements   4. Insurance contracts are discharged as per the contracts terms |
| 1. Apply property law | * 1. ***Property*** is classified based on property Act 2020   2. Land interests are determined as per the organizational requirements   3. ***Intellectual property*** is determined as per the constitution of Kenya 2010 |

**RANGE**

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

|  |  |
| --- | --- |
| **Variable** | **Range** |
| 1. Kenyan courts include but not limited to: | * + Supreme Court   + Court of Appeal   + High Court   + Employment and Labor Relations Court   + Environment and Land Court   + Magistrates Court   + Court Martial   + Kadhis’ Court |
| 1. Sources of law in Kenya include but not limited to: | * + Constitution   + Legislation (Acts of parliament)   + Judicial precedent   + County assembly legislations   + Statutes of general application   + Common law   + Equity   + Islamic law |
| 1. Types of torts include but not limited to: | * + Negligence   + Defamation   + Nuisance   + Trespass |
| 1. Terms of sale of goods may include but not limited to: | * + Conditions   + Warranties |
| 1. Negotiable instrument may include but not limited to: | * + Cheques   + Bill of exchange   + Promissory note |
| 1. Insurance principles may include but not limited to: | * + Subrogation   + Indemnity   + Insurable interest   + Utmost good faith etc. |
| 1. Property may include but not limited to: | * + Real and personal   + Movable   + immovable   + tangible   + And intangible |
| 1. Intellectual property may include but not limited to: | * + Patents   + trademarks,   + Copyrights   + Industrial designs |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs knowledge of:

* Shorthand
* Principles of management
* Research Skills
* Financial Accounting
* Commercial Law

**SKILLS**

The individual needs the following skills:

* Evaluation.
* Communication
* Analysis.
* Numeracy.
* Report writing.
* Negotiation
* Inter-personal.

**EVIDENCE GUIDE**

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

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Identified sources of law in Kenya as per Judicature Act   2. Classified law as per Kenyan law.   3. Determined court structure as per the constitution of Kenya, 2010   4. Determined jurisdiction of courts as per the constitution of Kenya, 2010   5. Identified types of torts as per law of torts   6. Identified general defenses in tort as per the law of tort   7. Identified essentials of a valid contract as per the law of contract   8. Identified methods of discharging contract are identified as per the law of contract   9. Determined remedies of breach of contract as per the law of contract   10. Established agents’ authority as per the law of agency   11. Identified duties of agents as per law of agency   12. Identified rights of agents as per law of agency   13. Determined methods of terminating agency as per law of agency   14. Determined terms of sale of goods as per sale of goods Act 2015   15. Determined doctrine of caveat emptor as per sale of goods Act 2015   16. Identified rights of parties as per sale of goods Act 2015   17. Determined nature of hire purchase agreement as per hire purchase Act 2017   18. Determined conditions of terminating hire purchase agreement as per hire purchase Act 2017   19. Identified insurance contracts as per insurance Act 2020 laws of Kenya   20. Analyzed Insurance principles based on insurance Act 2020 laws of Kenya   21. Determined intellectual property as per the constitution of Kenya 2010 |
| 1. Resource implications | The following resources should be provided:  2.1 Access to relevant workplace or appropriately simulated  environment where assessment can take place  2.2 Materials relevant to the proposed activity or tasks |
| 1. Methods of Assessment | Competency in this unit may be assessed through:  3.1 Practical  3.2 Projects  3.3 Poe evaluation  3.4 Third party reports  3.5 Written tests |
| 1. Context of Assessment | 1. The competency may be assessed in a workplace or a simulated workplace |
| 1. Guidance information for assessment | 5.1 Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**APPLY FINANCIAL ACCOUNTING SKILLS**

**UNIT CODE: 0411 451 05A**

**UNIT DESCRIPTION**

This unit specifies the competencies required to apply financial accounting skills. It involves applying accounting concepts, preparing books of original entry, posting transactions to the ledger, preparing cash books, correcting accounting errors, preparing bank reconciliation statements, maintaining non-current assets register, maintaining receivables and payables ledgers and preparing sole trader statements.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| 1. Apply accounting concepts | * 1. ***Accounting concepts, conventions and policies*** are applied as per accounting standards.   2. Accounting equation is drawn as per the double entry concept and accounting principles   3. ***Users of accounting information*** are identified according to the business entity |
| 1. Prepare books of original entries | * 1. Transactions are classified based on type of transaction   2. Source documents are identified in line with transactions   3. Books of original entries are identified based on purpose   4. Source documents are recorded in the books of original entry based on transaction type |
| 1. Post transaction to the ledger | * 1. Ledgers are classified based on transaction types   2. Ledger accounts are identified as per types of ledgers   3. Transactions are posted to ledger accounts as per accounting guidelines   4. Ledger accounts are balanced as per accounting guidelines   5. Trial balance is extracted from ledger accounts as per accounting guidelines |
| 1. Prepare cash books | * 1. ***Cash books*** are identified according to their columns   2. Cash receipts are classified as either incoming or outgoing as per accounting principles   3. Cash receipts are recorded in line with their classification.   4. Cash discounts are recorded as per accounting guidelines |
| 1. Correct accounting errors | * 1. Errors that affect the agreement of the trial balance are identified as per GAAPs   2. Errors that do not affect the agreement of trial balance are identified following GAAPs   3. Errors are corrected on the basis of double entry rules   4. Suspense balance is eliminated based on errors corrected.   5. Reported gross/net profit is corrected on the basis of corrected errors.   6. Statement of financial position is corrected on basis of corrected errors. |
| 1. Prepare Bank Reconciliation statements | * 1. Cash book and bank statement balance discrepancies are identified as per the accounting principles   2. Cash book (bank column) balance is updated as per accounting guidelines   3. Bank Reconciliation statement is prepared as per accounting guidelines |
| 1. Maintain non-current assets’ register | * 1. Costs of assets are determined as per ***accounting standards***   2. Depreciation is computed as per organization policy on valuation of non-current assets   3. Depreciation is recorded as per accounting ***guidelines***   4. Purchase of non-current assets are recorded in line with accounting guidelines   5. Disposals are recorded as per accounting guideline   6. Asset balances are determined as per accounting guidelines |
| 1. Maintain receivables and payables ledgers | 1. Bad debts are identified and written off as per organization policies 2. Allowances (provisions) are created in line with the prudence concept 3. Receivables balance is adjusted as per written off debts and the allowances (provisions) created 4. Payables balance is adjusted as per GAAPs 5. Control accounts are prepared as per GAAPs |
| 1. Prepare sole trader statements | * 1. Income and expense balances are identified as per entity’s trial balance   2. Year- end adjustments are made on the balances as per accounting guidelines   3. Statement of profit or loss is prepared based on adjusted balances.   4. Asset, liability and capital balances are identified as per the entity’s trial balance   5. Year-end adjustments are made in the balances as per accounting guidelines.   6. Statement of financial position is prepared based on adjusted balances |

**RANGE**

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

|  |  |
| --- | --- |
| **Variable** | **Range** |
| 1. Accounting concepts, conventions and policies may include but not limited to: | * Going concern * Accrual * Prudence * Matching |
| 1. Cashbooks include but not limited to: | * Two column cashbook * Three column cashbook * Petty cashbook |
| 1. Accounting guidelines: | * Accounting standards * Accounting concepts/conventions/bases |
| 1. Accounting Standards include but not limited to: | * Kenya Accounting Standards (KAS) * International Accounting Standards (IAS) * International Financial Reporting Standards (IFRS) |

**REQUIRED SKILLS AND KNOWLEDGE**

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

**Required skills**

The individual needs the following skills:

* Numeracy
* Analytical
* Computational
* Recording with accuracy and precision

**Required knowledge**

The individual needs knowledge of:

* Shorthand
* Principles of management
* Research Skills
* Financial Accounting
* Commercial Law

**EVIDENCE GUIDE**

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

|  |  |
| --- | --- |
| * + - 1. Critical Aspects of Competency | **Assessment requires evidence that the candidate:**   1. Recorded source documents in the books of original entry as per accounting standards 2. Posted transaction to ledger accounts as per accounting standards 3. Recorded cash receipts in the cash book as per accounting standards 4. Corrected accounting errors as per accounting standards 5. Prepared Bank Reconciliation statement as per accounting standards 6. Recorded depreciation as per accounting standards 7. recorded purchase of non-current assets as per accounting standards 8. Prepared control accounts as per accounting standards |
| * + - 1. Resource implications | The following resources should be provided:   1. Access to relevant workplace 2. Appropriately simulated environment where assessment can take place 3. Materials relevant to the proposed activity or tasks |
| * + - 1. Methods of Assessment | Competency in this unit may be assessed through:   1. Practical 2. Projects 3. POE evaluation 4. Third party reports 5. Written tests |
| * + - 1. Context of Assessment | Competency may be assessed individually in the actual workplace or simulated workplace environment |
| * + - 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**APPLY MANAGEMENT SKILLS**

**UNIT CODE: 0413 451 06A**

**Unit Description**

This unit specifies the competencies required to Apply management skills. It involves analyzing context of management, performing management functions, demonstrating leadership skills and analyzing group and teams.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **Element**  *These describe the key outcomes which make up workplace function.* | **Performance Criteria**  *These are assessable statements which specify the required level of performance for each of the elements.* ***Bold and italicized terms*** ***are elaborated in the Range*** |
| --- | --- |
| 1. Analyze context of management | 1. Importance of management is described as per organization policy 2. Management levels are identified as per organization policy 3. ***Managerial skill*** are demonstrated as per organization policy 4. ***Ethics and integrity*** are demonstrated as per organization policy 5. Characteristics of a good manage are demonstrated as per organization policy 6. Managerial rules in managements are analyzed as per organization policy |
| 1. Perform management functions | * 1. Planning functions are performed as per organization policy   2. Organizing functions are performed as per organization policy   3. Directing functions are performed as per organization policy   4. Staffing functions are performed as per organization policy   5. Controlling functions are performed as per organization policy |
| 3. Develop leadership skills | 1. ***Theories of leadership*** are analysed as per SOPs 2. Qualities of a leader are identified SOPs 3. ***Leadership styles*** are analysed SOPs |
| 4. Analyze groups and teams | 1. The purpose of groups and teams formation is analyzed as per organization policy 2. Groups and teams effectiveness is analyzed as per organization policy 3. Groups and teams are formed as per organization policy |

**RANGE**

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

| **Variable** | **Range**  ***May include but are not limited to:*** |
| --- | --- |
| Theories of leadership | * Systems theory * Contingency theory * Classical theory * Administration theory * Bureaucratic theory * Scientific theory * Human relation theory |
| Leadership styles | * Democratic theory * Autocratic * Laissez faire * Transformational * Transactional |
| Managerial skills | * Interpersonal skills * Communication and motivation * Organization and delegation * Mentoring * Decision making |
| Ethics and integrity | * Accountability * Honest * Integrity * Fairness |

| **REQUIRED SKILLS AND KNOWLEDGE** | |
| --- | --- |
| **Required skills**   * Communication skills * Problem solving skills * Data collection and analysis skills * Presentation skills * Time management skills * Adaptability skills * Report writing skills * Teamwork and interpersonal skills | **Required Knowledge**   * Management policies and procedures * Principles of entrepreneurship |

**EVIDENCE GUIDE**

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

| 1. Critical aspects of competency | Assessment requires evidence that the candidate:   * 1. Importance of management is described as per organization policy   2. Planning functions are performed as per organization policy   3. Qualities of a leader are identified as per organization policy   4. Groups and teams effectiveness is analyzed as per organization policy |
| --- | --- |
| 2. Resource implications | The following resources should be provided:  2.1 Workplace location  2.2 Computer  2.3 Tablet  2.4 Stationery |
| 3. Methods of  Assessment | Competency in this unit may be assessed through:  3.1 Observation  3.2 Written  3.3 Oral  3.4 Project |
| 4. Context of  Assessment | 4.1 off job  4.2 on job |
| 5. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**APPLY BUSINESS MATHEMATICS AND STATISTICS**

**UNIT CODE**: **0588 451 07A**

**UNIT DESCRIPTION**

This unit specifies the competencies required to apply business mathematics and statistics to solve business problems. It involves applying statistical equations, applying statistical matrices, working out commercial mathematics, carrying out elementary statistics, carrying out descriptive statistics, applying set theory, applying basic probability theory and using index numbers.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function. | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| 1. Apply statistical equations | 1. Linear equations are determined as per the objective functions 2. Quadratic equations are determined as per the objective functions 3. Simultaneous equations are formulated as per the objective functions 4. Break-even analysis is computed as per the organization objective. 5. Differentiation and integration is carried out as per the objective functions 6. Total revenue, total cost and profit equations are formulated as per the organizational objectives. |
| 1. Apply statistical matrices | 1. Addition, subtraction, division and multiplication formulae are performed as per the order of operations. 2. Determinants of 2x2 matrices are calculated as per the order of operations. 3. Inverses of 2x2 matrices are calculated as per the order of operations 4. Matrices are applied to business operations as per the organizational objectives. |
| 1. Work-out commercial mathematics | 1. ***Discounts*** are computed as per organization’s policy 2. Commissionsare determined based on the company policies and procedures. 3. ***Methods of calculating wages*** are determined 4. Wages and salaries are computed as per organization policies. 5. Simple and compound interests are calculated as per the organization’s policy 6. Profit margin and mark-up are computed based on organization’s policy 7. Gross pay and net pay are calculated as per organization’s policy 8. Depreciation and appreciation of assets are worked-out as per the accounting guidelines. 9. Hire purchase price is determined as per the hire purchase agreement 10. Foreign exchange transactions are computed as per trade agreements. |
| 1. Carry out elementary statistics | 1. ***Methods of data collection*** are identified as per the organisation’s objectives 2. Sampling techniques and presentation of data is carried out as per the organisation’s objectives. 3. Data is presented using ***Tables and diagrams*** as per the functions Data is presented using ***Graphs*** as per the function 4. Cumulative frequency curve (OGIVE) are drawn and applied. |
| 1. Carry out descriptive statistics | 1. ***Measures of central tendency*** are determined according to Work procedures. 2. ***Measures of dispersion*** are determined on the basis of Work procedures 3. Measures of skewness and kurtosis are analyzed as per the Work procedures. |
| 1. Apply set theory | 1. Sets types are identified following the set theory. 2. Sets operations are performed as per the set theory. 3. Venn diagrams are drawn according to the set theory.. 4. Business problems are solved using set theory. |
| 1. Apply basic probability theory | 1. Probability events are identified as per the work place requirements. 2. Types of events are determined as per the work place requirements.. 3. Rules of probability are applied based on additive and multiplicative rules. 4. Bayes’ Theorem is applied as per the theorem rules 5. Probability trees are drawn according to events. 6. Solve business problems using probability |
| 1. Use index numbers | * 1. ***Index numbers*** are computed as per the formula   2. Methods of determining index numbers are applied as per the Work procedures.   3. Consumer Price Index (CPI) is calculated following the formula   4. Weighted index numbers are computed as per the formula |

**RANGE**

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

|  |  |
| --- | --- |
| Variable | Range |
| 1. ***Discounts*** may include but not limited to: | * Cash discount * Trade discount * Quantity discount |
| 1. ***Methods of data collection*** may include but not limited to: | * Primary * Secondary Data |
| 1. ***Tables and diagrams*** may include but not limited to: | * Frequency distribution table * Bar charts * Pie charts * Histogram * frequency polygons |
| 1. ***Graphs*** may include but not limited to: | * Basic time series graphs * Z-charts * Lorenz curves and * Semi-log graphs |
| 1. ***Methods of calculating wages*** may include but not limited to: | * Piece rate * Hourly rate |
| 1. ***Measures of central tendency*** may include but not limited to: | * Mean: arithmetic mean, weighted arithmetic mean, geometric mean and harmonic mean * Mode * Median |
| 1. ***Measures of dispersion*** may include but not limited to: | * Range * Standard deviation * Variance * Co-efficient of variation * Quartile deviation |
| 1. ***Index numbers*** may include but not limited to: | * Laspeyre’s * Paasche’s * Fisher’s ideal * Marshal |

**REQUIRED SKILLS AND KNOWLEDGE**

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

**Required skills**

The individual needs the following skills:

* Numeracy
* Analytical
* Decision making
* Problem solving
* Critical thinking

**Required knowledge**

The individual needs the knowledge of:

* Data collection, presentation and analysis
* Business calculations

**EVIDENCE GUIDE**

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

|  |  |
| --- | --- |
| * + - 1. Critical Aspects of Competency | ***Assessment requires evidence that the candidate is able to:***   1. Formulate Simultaneous equations as per the objective functions 2. Compute break-even analysis as per the organization objective. 3. Formulate total revenue, total cost and profit equations as per the organizational objectives 4. Apply statistical matrices as per the organizational objectives. 5. Compute profit margin and mark-up based on organization’s policy 6. Compute simple and compound interests as per the organization’s policy 7. Present data using tables and diagrams as per the functions Data is presented using Graphs as per the function 8. Present data using graphs as per the functions Data is presented using Graphs as per the function 9. Determine measures of dispersion on the basis of Work procedures 10. Determine measures of central tendency according to Work procedures. 11. Solve business problems using Set theory according to the set theory. 12. Solve business problems using probability according to events. |
| * + - 1. Resource Implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant assessment environment.   3. Resources relevant to the proposed assessment activity or tasks. |
| * + - 1. Methods of Assessment | Competency in this unit may be assessed through:  3.1 Practical  3.2 Projects  3.3 Poe evaluation  3.4 Third party reports  3.5 Written tests |
| * + - 1. Context of Assessment | 4.1 The competency may be assessed in a workplace or a simulated workplace |
| * + - 1. Guidance information for assessment | 5.1 Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

APPLY ECONOMIC SKILLS

**UNIT CODE: 0311 451 08A**

**UNIT DESCRIPTION**

This unit specifies the competencies required to apply economic skills. It involves; demonstrating understanding of economic concepts, applying demand concept in market analysis, applying supply concept in market analysis, setting prices of the products, applying theory of consumer behavior, applying production theory, applying theory of costs, differentiating market structures, determining national income, apply understanding of money and banking, apply understanding of inflation and unemployment and apply understanding of international trade

|  |  |
| --- | --- |
| **ELEMENTS AND PERFORMANCE CRITERIAELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| 1. Apply fundamental economic concepts | 1. ***Economic concepts*** are identified as per the organizational requirements. 2. Economic methodology is selected as per organizational requirements. 3. Scope of economic resources are determined as per organizational requirements 4. Economic systems are developed as per the organizational requirements 5. Resources are utilized effectively as per the economic objectives. |
| 1. Apply demand and Supply in market analysis | 1. Market demand and Supply dynamics are determined in line with business objectives. 2. Factors affecting demand and supply are outlined as per the market trends. 3. Demand and Supply curves are derived as per market trends. 4. Decisions are made in line with elasticity of demand and Supply |
| 1. Apply consumer behavior theory | 3.1 Consumer behavior approaches are identified as per the market trends.  3.2 Consumer utility is analyzed as per the consumer feedback.  3.3 Consumer equilibrium is analyzed based on consumer income and product prices  3.4 Indifference curves are applied as per organizational objectives |
| 1. Apply production theory | 4.1 Mobility of factors of production is determined as per organizational requirements.  4.2 Output units are determined as per organizational resources.  4.3 Stages of production are identified as per organizational products.  4.4Long run production period is analyzed as per the organizational objectives |
| 1. Apply costs theory | * 1. Production costs are classified as per organizational production policy.   2. Short run costs are analyzed as per Work procedures   3. Long run costs are analyzed as per Work procedures   4. Cost curves are analyzed as per organizational production policy.   5. Optimal size of the firm is determined based on economies of scale. |
| 1. Differentiate market structures. | * 1. Market structures are determined as per economic system   2. Market output is determined as per economic system   3. Market prices are determined as per economic system   4. ***Market structures*** are selected as per organizational requirement |
| 1. National income | * 1. Concepts of national income are identified as per economy needs   2. Methods used to measure national income are identified as per market needs   3. Problems of national income are identified as per the current situation   4. Importance of national income statistics as per economy needs   5. National income equilibrium is determined as per economic needs |
| 1. Money and banking | * 1. Functions of money are identified as per market needs   2. Characteristics of money are analyzed as per   3. Financial institutions are identified as per financial structure guidelines   4. Functions of central bank and commercial bank as per formulated regulatory framework   5. Functions of non-banking financial institutions are analysed as per formulated framework |
| 1. Apply understanding of Inflation and unemployment | * 1. Types of inflation are identified as per the economic conditions   2. Inflation causes are classified as per the economic conditions   3. Inflation effects are identified as per the economic conditions   4. Measures of inflation control are determined as per the regulatory policies   5. Unemployment causes are identified as per the economic conditions   6. Unemployment control measures are determined as per the regulatory policies |
| 1. International trade | * 1. Concepts of international trade are identified as per the global demands   2. International balance of payments analyzed as per economic needs   3. International Balance of trade analyzed as per economic trends   4. International Terms of trade are identified as per global needs |

**RANGE**

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

| **Variable** | **Range** |
| --- | --- |
| 1. Economic concepts may include but not limited to: | * + Economic resources   + human wants   + scarcity and choice   + opportunity cost   + production possibility curves/frontiers   + wealth   + welfare |
| 1. National income concepts include but not limited to: | * + gross domestic product (GDP   + Gross national product (GNP) and net national product (NNP)   + Net national income (NNI) at market price and factor cost   + Disposable income |
| 1. Market structures may include but not limited to: | * + Monopoly   + Perfect competition   + Monopolistic competition   + Oligopoly   + Duopoly |
| 1. Financial institutions may include but not limited to: | * + Banking institutions   + Non-banking financial institutions |
| 1. Costs may include but not limited to: | * + Fixed costs   + Variable costs   + Total cost   + Opportunity costs   + Marginal cost |

| **REQUIRED SKILLS AND KNOWLEDGE** | |
| --- | --- |
| **Required skills**   * Interpersonal * Critical thinking * Communication * Evaluation. * Analytical | **Required Knowledge**   * Computer Operations * Bank operational procedures * Legal operating environment apply * Banking policies and procedures * Market trends * Financial markets |

**EVIDENCE GUIDE**

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

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   1. Developed economic systems as per the organization requirement 2. Derived demand curve as per the market trends 3. Made decisions in line with elasticity of demand 4. Derived supply curve as per the market trends 5. Made decisions in line with elasticity of supply 6. Established Equilibrium price as per the market trends 7. Analyzed consumer equilibrium based on consumer income and product price 8. Applied indifference curves as per organizational objectives 9. Analyzed long run production period as per organizational objectives 10. Analyzed cost curves as per organizational production policy 11. Determined optimal size of the firm based on economies of scale 12. Selected market structures as per organizational requirement 13. Determined National income equilibrium as per national economic policy 14. Identified National income measurement methods based on fiscal policies 15. Applied national income statistics as per national economic policy 16. Identified financial institutions as per financial market regulatory authority 17. Determined functions of money as per economic requirement 18. Determined measures of inflation control as per the regulatory polices 19. Determined International balance of payment as per international trade |
| --- | --- |
| 1. Resource implications | The following resources should be provided:  2.1 Access to relevant workplace or appropriately simulated  environment where assessment can take place  2.2 Materials relevant to the proposed activity or tasks |
| 1. Methods of Assessment | Competency in this unit may be assessed through:  3.1 Practical  3.2 Projects  3.3 Poe evaluation  3.4 Third party reports  3.5 Written test |
| 1. Context of Assessment | 4.1The competency may be assessed in a workplace or a simulated workplace |
| 1. Guidance information for assessment | 5.1 Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**UNDERTAKE BUSINESS COMMUNICATION**

**UNIT CODE:** 0413 451 09A

**UNIT DESCRIPTION**

This unit specifies the competencies required to undertake business communication. It involves administering communication channels, implementing types of communication, implementing service charter, safeguarding confidentiality of information, coordinating communication on social media platforms, preparing workplace meeting and reports.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the key outcomes which make up workplace function. | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the Range*** |
| --- | --- |
| 1. Administer Communication channels | * 1. Communication processes are handled in line with the human resource manual on correspondence.   2. Principles of effective communication are applied as per the SOPs   3. Channels of communication are administered as per the SOPs   4. Factors to effective communication are selected in line with SOPs   5. Barriers to effective communication are identified in line with the SOPs   6. Familiarize with the human resource manual on correspondence.   7. Sources of Information are identified as per the SOPs   8. Organization Policies are identified and applied in line with the SOPs   9. Records are kept inline with the human resource manual on correspondence and the SOPs |
| 1. Implement types of communication | * 1. Types of written communication are identified and applied according to workplace requirements.   2. Existing non-verbal communication techniques are identified and applied based on organization policy.   3. Types of oral communication are identified and established as per organization policy. |
| 1. Implement service charter | * 1. Familiarize with the organization service charter.   2. Emphase the Importance of service charter   3. Response to correspondences is done in line with the service charter.   4. Record retrieval is done in line with service charter. |
| 1. Safeguard confidentiality of information | * 1. Familiarize with the organization policy on confidentiality of information.   2. ***Physical securing*** of records and correspondences is done.   3. Monitor how records and correspondences in circulation are handled within the organization.   4. Information is***secured*** as per SOPs of the Organisation   5. Sensitize employees on ***safeguarding confidentiality*** of information and records.   6. Regular tracing of records and correspondences is done in line with the SOPs. |
| 1. Coordinate communication on social media platforms | * 1. Organization human resource social media requirements are identified as per SOPs   2. Initiate development and review of social media policies and procedures components on human resource in line with the Human Resource Manual   3. Select the social media platforms that meet the needs of the organization.   4. Source for content, both internal and external, for use on social media platforms are handled as per SOPs   5. Respond to customers in timely manner directing them to relevant information as required according to social media policies and procedures.   6. Update of the social media account to maximise effectiveness as per SOPs   7. Enforce adherence to legal and ethical practices.   8. Track social media activities using ***social media monitoring tools.***   9. Report the social media engagements to management for implementation in line with SOPs |
| 1. Prepare work place meetings | * 1. Minute taking is defined as per the SOPs   2. Types of meetings are highlighted as per the SOPs   3. ***Structure of meetings*** are identified as per the SOPs |
| 1. Prepare workplace report | * 1. Report writing is defined as per the SOPs.   2. Importance of reports in human resource function is emphasized as per the SOPs.   3. Forms and types of reports are described as per the SOPs   4. Reports formats are identified as per the SOPs   5. Reports preparation is done as per the SOPs. |

**RANGE**

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

|  |  |
| --- | --- |
| **Variable** | **Range** |
| 1. Action taken may include but not limited to: | * + Indexing   + Photocopy for circulation   + Filing   + Recording   + Taking to officer for action |
| 1. Physical securing may include but not limited to: | * + Lock and key   + Reinforced storage   + Fireproofing   + Lockable cabinets   + Restricted access |
| 1. Social media monitoring tools may include but not limited to: | * + Twitter counter   + Hootsuite   + Klout   + Buzzlogix   + Digimind |
| 1. Structure of meetings may include but not limited to: | * + Notice   + Agenda   + Preparation of other relevant documents   + Minute formats |

**REQUIRED SKILLS AND KNOWLEDGE**

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

**Required Skills**

The individual needs to demonstrate the following skills:

* Communication
* Data analysis and presentation
* Listening
* Organizational
* Leadership
* Time management
* Conflict management and resolutions
* Budgeting
* Decision making
* Emotional intelligence
* Interpersonal Relations
* Crisis management
* Analytical skills
* Data analysis and presentation
* Public relations
* Negotiation
* Computer
* SOP
* Operations of the organization
* Emerging issues.
* Record management
* Reading

**Required Knowledge**

The individual needs to demonstrate knowledge and understanding of:

* Work place procedures
* Human resource procedures and manuals
* Record Management function
* Work Planning and documentation
* Dispute resolution process
* Legislations, policies and regulations
* Communication processes
* Negotiations
* Interpersonal relations
* ICT
* Emotional intelligence
* Social media use

**EVIDENCE GUIDE**

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

|  |  |
| --- | --- |
| 1. Critical aspects of  Competency | Assessment requires evidences that the candidate:   * 1. Handled organizational policies as per SOPs   2. Handled incoming and outgoing mails.   3. Sorted correspondence and took necessary action.   4. Maintain human resource records.   5. Align response time to service charter.   6. Safeguarded confidentiality of information.   7. Handled challenges in safeguarding social media platform   8. Legal and Ethical Issues in social media platforms   9. Managed communication on social media platforms.   10. Prepared work place meetings   11. Prepared work place reports |
| 1. Resource Implications for competence certification | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place 3. Materials relevant to the proposed activity or tasks |
| 3. Method of assessment | Competency may be assessed through:   * 1. Projects   2. Review of portfolios   3. Review of third-party workplace reports |
| 4. Context for assessment | Assessment may be done in the workplace or in a simulated workplace setting (assessment centers). |
| 5. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

# CONDUCT RESEARCH PROJECT

**UNIT CODE: 0413 541 10A**

**UNIT DESCRIPTION**

This unit covers the competencies required to carry out research study. It includes: writing research study introduction, reviewing research literature, designing research study methodology, analyzing research study findings, summarizing research study findings and compiling research report.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **Elements** | **Performance Criteria** |
|  |
| 1. Write research study introduction | 1. Appropriate research title is established as per area of specialization 2. ***Research variables*** are identified in line with research title 3. Research objectives are formulated in line with research variables 4. Research questions are formulated as per research objectives 5. ***Background to the study*** is developed as per research title 6. Statement of the problem is formulated as per background of the study 7. Significance of the study is established as per stakeholder needs 8. ***Scope of the study*** is specified as per research title 9. Limitations of the study are identified as per scope of study |
| 2. Review research literature | 1. Relevant theories of the study are described as per research objectives 2. Empirical literature is reviewed as per research objectives 3. Conceptual framework is formulated as per research variables 4. Research gaps are identified as per empirical literature review |
| 3.Design research study methodology | 3.1 Relevant ***research designs*** are identified as per type of research study  3.2 ***Target*** ***population*** is established as per scope of study  3.3 Sample and ***sampling techniques*** are identified as per target population  ***3.4 Data collection tools*** are formulated as per research objectives  3.5 Data is appropriately collected as per research objectives |
| 4. Analyze study findings | 4.0 Response rate is generated as per research instrument  4.1 Data analysis is carried out as per response rate  4.2 Data analysis results are presented as per presentation methods |
| 5. Summarize research study findings | 5.1 Findings of study are concluded as per ***data analysis techniques*** results  5.2 Recommendations are generated in line with research findings  5.3 Room for further studies is suggested as per research study findings |
| 6. Compile research report | ***6.1 Preliminary pages*** are prepared as per institutional requirements   * 1. Research report is organized as per institutional requirements   2. List of references are compiled as per institutional requirement   3. ***Appendices*** are attached as per institutional requirements   4. Research report is ***proofread*** as per institutional requirements   6,6 Research report is ***bound*** as per institutional requirements |

**RANGE**

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

|  |  |
| --- | --- |
| **VARIABLE** | **RANGE** |
| * 1. Research variables may include but not limited to: | 1. Independent variables 2. Dependent variables 3. Moderating variables, etc. |
| * 1. Background to the study may include but not limited to: | * 1. Global   2. Regional   3. Local |
| * 1. Scope of the study may include but not limited to: | 1. Study focus 2. Study population 3. Study variables, etc. |
| * 1. Research designs may include but not limited to: | 1. Descriptive survey 2. Correlations 3. Experimental, etc. |
| * 1. Target Population may include but not limited to: | 1. Finite 2. Infinite |
| * 1. Sampling techniques may include but not limited to: | 1. Probability 2. Non-probability |
| * 1. Data collection tools may include but not limited to: | 1. Questionnaires 2. Interview schedules 3. Observations, etc. |
| * 1. Data analysis techniques may include but not limited to: | * 1. Quantitative   2. Qualitative |
| * 1. Preliminary pages may include but are not limited to: | * 1. Cover page   2. Declaration   3. Dedication |
| 10. Appendices may include but not limited to: | 11.1 Letter of introduction  11.2 Data collection tools  11.3 Work plan, etc. |
| * 1. Proofread may include but not limited to: | 1. Change of tenses from future tense to past tense 2. Appropriate line spacing 3. Appropriate font style and font size, etc. |
| * 1. Bound may include but not limited to: | 13.1 Spiral  13.2 Case/hard cover, etc. |

**REQUIRED SKILLS AND KNOWLEDGE**

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

**Required Skills**

The individual needs the following skills:

* Analytical
* Time management
* Critical thinking
* Academic writing
* Attention to detail
* Problem-solving
* Language
* Formatting
* Organizational
* Summarizing
* Originality

**Required Knowledge**

The individual needs knowledge of:

* Communication
* Basic statistics
* Research engines
* Digital literacy
* Research engines
* Time management

**EVIDENCE GUIDE**

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

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires that the individual:   1. Established appropriate research title as per area of specialization 2. Identified research variables in line with research title 3. Formulated research objectives in line with research variables 4. Developed background to study as per research title 5. Formulated statement of problem as per institutional requirements 6. Specified scope of study as per research title 7. Described relevant theories of study as per research objectives 8. Reviewed empirical literature as per research objectives 9. Formulated conceptual framework as per research variables 10. Identified relevant research designs as per type of research study 11. Established target population of study as per the scope of study 12. Identified sample and sampling techniques as per target population 13. Formulated data collection tools as per research objectives 14. Identified data analysis techniques as per type of study 15. Identified data presentation methods as per type of study 16. Generated response rate as per research instrument 17. Carried out data analysis as per response rat 18. Presented data analysis results as per presentation method 19. Carried out qualitative analysis as per institutional requirements 20. Concluded findings of the study as per data analysis results 21. Generated response rate as per research instrument 22. Prepared preliminary pages as per the institutional requirements 23. Organized research report as per the institutional requirements 24. Compiled list of references as per the institutional requirements 25. Attached appendices as per the institutional requirements 26. Proofreading research report as per the institutional requirements 27. Spiral bound research report as per the institutional requirements |
| 1. Resource implications | The following resources should be provided:   1. Appropriately simulated environment where assessment can take place. 2. Access to relevant assessment environment. 3. Resources relevant to the proposed assessment activity or tasks. |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   1. Practical 2. Projects 3. POE evaluation 4. Third party reports 5. Written tests |
| 1. Context of Assessment | Competency may be assessed individually in the actual workplace or simulated workplace environment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**CORE UNITS OF COMPETENCY**

**PERFORM TRADE ACTIVITIES**

**UNIT CODE:** 0414 554 10A

**UNIT DESCRIPTION**

This unit specifies the competencies required to perform trade activities. It includes gathering channel insights, matching consumer needs to distribution channel, determining best channel(s), conducting channel trade activities and preparing trade activities report.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| * 1. Gather channel insights | * 1. **Market size** is determined as per geographical coverage   2. Advice on **price strategies** is given as per organization’s pricing policy and competitor analysis report.   3. Consumer **purchasing pattern** is analyzed as per geographical area   4. **Distribution channel** is selected as per consumer needs analysis report |
| * 1. Match consumer needs to distribution channels | * 1. Best **Route *to Market*** (RtM) are identified as per trade reports.   2. Competitor routes to market (RtM) are analyzed as per competitor analysis report.   3. Distribution channels performance is analyzed as per geographical report. |
| * 1. Determine best channel (s). | * 1. Route to Market (RtM) options are identified as per industry reports and marketing strategy.   2. Picture of success is determined as per marketing strategy.   3. RtM is selected as per DIME Approach (Direct, Indirect, Mix & Everything in between)   4. Strategy Map is defined and prepared for approval as per marketing strategy. |
| * 1. Conduct channel trade activities. | * 1. Trade activities are analyzed as per marketing strategy   2. Trade activity classification is carried out as per marketing strategy.   3. Territory plan and allocation schedule is obtained as per sales and marketing plan.   4. Trade activities are monitored as per marketing strategy.   5. **Point of Sale Material** (POSM) are selected as per marketing strategy.   6. Trade activities are scheduled as per sales and marketing action plans.   7. Trade activities are performed as per trade activities schedule |

**RANGE**

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

| **Variable** | **Range** |
| --- | --- |
| 1. Market size may include but not limited to: | * Consumer base * Customer base * Profitability * Competitive advantage |
| 1. Pricing strategy may include but not limited to: | * Cost of production * Labor * Advertising expenses * Competitor analysis |
| 1. Purchasing pattern may include but not limited to: | * Purchasing frequency * Purchasing quantity * Purchasing duration * Purchasing time |
| 1. Distribution channel may include but not limited to: | * Wholesalers * Retailers * Distributors * Internet/digital * Dealers * Consultants |
| 1. Route to Market may include but not limited to: | * Hyper market * Supermarket * Stockists * Restaurants |
| 1. Route to market models may include but not limited to: | * Direct * Indirect |
| 1. Trade activities may include but not limited to: | * Activation * Sampling of products * Promotions |
| 1. Picture of success may include but not limited to: | * Sales targets * Brand recognition * Market Share * Awards |
| 1. Point of Sale Material may include but not limited to: | * Flyers * Banners * Gondola * Branded tents |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

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

**SKILLS**

The individual needs to demonstrate the following skills:

* Analytical
* Communication
* Presentation
* Reporting
* Monitoring and evaluation
* Critical thinking

**EVIDENCE GUIDE**

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

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:  Demonstrated   * 1. Gathered channel insights   2. Analyzed channels of performance   3. Determined Picture of success   4. Selected RtM as per DIME Approach (Direct, Indirect, Mix & Everything in between   5. Analyzed *Trade activities* Trade activities are monitored as per marketing strategy   6. Selected Point of Sale Material (POSM) |
| 1. Resource Implications | The following resources should be provided:   1. Access to relevant workplace or appropriately simulated 2. Environment where assessment can take place 3. Materials relevant to the proposed activity or tasks |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Written tests   2. Oral questioning   3. Third party reports   4. Case studies |
| 1. Context of Assessment | Competency may be assessed individually in the actual workplace or simulated workplace environment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

**CONDUCT BRAND PROMOTION**

**UNIT CODE:** 0414 451 12A

**UNIT DESCRIPTION**

This unit specifies the competencies required to conduct brand promotion. It involves determining brand objectives, identifying brand barriers, determining brand positioning, undertaking brand promotion activities and preparing brand promotion report.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Determine brand objectives | * 1. Brand purpose isdetermined as per organization’s overall business strategy.   2. Brand audience is identified as per target market report   3. Brand objectives timelines are assessed as per organization’s overall business strategy. |
| 1. Identify brand barriers | * 1. **Customer profile** is created as per brand strategy.   2. **Market research** is carried out as per industry report.   3. B**rand barriers** are analyzed as per internal and external marketing analysis   4. Brand barriers are handled as per marketing strategy   5. **Brand offering** is reassessed as per marketing strategy. |
| 1. Determine brand positioning | * 1. Target audience is reviewed as per branding strategy   2. Brand market is identified as per industry reports.   3. Brand competition is analyzed as per competition analysis report.   4. Critical ***brand benefits*** are identified as per branding strategy.   5. Brand benefits are communicated to consumers as per marketing strategy |
| 1. Undertake brand promotion activities | * 1. ***Brand promotion activities*** are classified as per marketing needs   2. Brand promotion target audience are identified as per promotion needs   3. Brand promotion budget is prepared as per method of promotion   4. Brand promotion work plan is prepared as per promotion activity   5. Brand promotion work plan is implemented and reviewed as per the promotion activities |
| 1. Prepare brand promotion activity report | * 1. Brand feedback from target audience is analyzed as per marketing procedures   2. Customer satisfaction measures are identified and carried out as per brand strategy targets   3. Brand acceptance is tested as per organization performance   4. Brand impact is measured as per marketing sales targets   5. Preliminary brand promotion report is prepared as per customer feedback   6. Recommendations from brand promotion activities are shared for decision making |

**RANGE**

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

| **Variable** | **Range** |
| --- | --- |
| 1. Customer profile may include but not limited to: | * Age * Gender * Income level * Geographical location |
| 1. Brand barriers may include but not limited to: | * Competition * Company and brand positioning * Target customers * Timing * Internal spokespeople * Branding cost |
| 1. Market research may include but not limited to: | * Market size * Consumer behaviors * Consumer purchasing power * Consumer economic power |
| 1. Brand offering may include but not limited to: | * Characteristics * Benefits * Value proposition |
| 1. Brand benefits may include but not limited to: | * Characteristics * Value proposition |
| 1. Brand promotion activities may include but not limited to: | * Personal selling * Advertising * Publicity * Sales promotion |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

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

**SKILLS**

The individual needs to demonstrate the following skills:

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

**EVIDENCE GUIDE**

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

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Demonstrated understanding of brand objectives   2. Determined brand objectives   3. Demonstrated understanding of brand market research   4. Carried out brand market research   5. Analyzed brand barriers   6. Reassessed brand offering   7. Analyzed brand competition.   8. Identified critical brand benefits.   9. Communicated brand benefits   10. Undertook brand promotion activities   11. Analyzed brand feedback from target audience   12. Identified customer satisfaction measures   13. Measured brand impact |
| 1. Resource Implications | The following resources should be provided:   * 1. Access to relevant workplace or appropriately simulated   2. Environment where assessment can take place   3. Materials relevant to the proposed activity or tasks |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Written tests   2. Oral questioning   3. Third party reports   4. Case studies |
| 1. Context of Assessment | Competency may be assessed individually in the actual workplace or simulated workplace environment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

**MANAGE CUSTOMER EXPERIENCE**

**UNIT CODE:** 0414 451 13A

**UNIT DESCRIPTION**

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

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Collect Customer insights | * 1. ***Target audience*** is identified in accordance with marketing strategy   1.2 Historical data on consumer behavior is analysed in accordance with industry reports  1.3 Gaps in current trends are identified in accordance with industry reports  1.4 Channels of collecting consumer insight are identified in accordance with data collection procedures  1.5 ***Consumer insight*** report is prepared in accordance with marketing procedures |
| 1. Determine engagement model | 2.1 Purpose of engagement model is identified in accordance with marketing strategy  2.2 Target audience is identified in accordance with brand strategy  2.3 Engagement channels are determined in accordance with consumer insight report  2.4 Audience engagement is carried out in accordance with Consumer service excellence standards policy and procedure  2.5 Engagement channels are evaluated in accordance with customer service excellence standards policy and procedure |
| 1. Test engagement content | 3.1 Audience is identified in accordance with marketing strategy  3.2 ***Communication channel*** is identified in accordance with target audience  3.3 Content is scheduled in the marketing channels in accordance with communication plan  3.4 Content is sent to audience in accordance with communication schedule  3.5 Audience responses are analyzed in accordance with data analysis procedure |
| 1. Evaluate customer experience | 4.1 Target audience is selected in accordance with consumer data base  4.2 ***Customer experience*** to be measured is determined in accordance with marketing strategy  4.3 ***Data collection channels*** are designed in accordance with data collection procedures  4.4 Data collected is analyzed in accordance with data analysis procedure  4.5 Customer experience gaps are identified in accordance with data analyzed  4.6 Corrective measures are carried out in accordance with Customer service excellence standard procedures  4.7 Customer experience report is prepared in accordance with Consumer service excellence standard procedures |
| 1. Innovate and renovate customer experience pipeline | 5.1 Objectives are set in accordance with customer experience analysis reports  5.2 Target audience is identified in accordance with marketing strategy  5.3 Customer insight data is collected in accordance with data collection procedures  5.4 Existing products are evaluated in accordance with marketing information  ***5.5 Competitor activity*** is analyzed in accordance with data analysis procedure  5.6 New processes are created in accordance with innovation procedures  5.7 Prototype is created in accordance with innovations procedures  5.8 New process is launched in accordance with marketing strategy |
| 1. Prepare customer experience report | 6.1 Customer experience data is analyzed in accordance with marketing strategy  6.2 Customer experience recommendations are made in accordance with analyzed data  6.3 Customer experience report is prepared and shared in accordance with marketing procedures |

**RANGE**

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

| **Variable** | **Range** |
| --- | --- |
| 1. Target audience includes but not limited to: | * Age * Gender * Ethnicity * Location * Personalities * Culture |
| 1. Consumer insights includes but not limited to: | * Consumer behavior * Purchasing power * Purchasing patterns |
| 1. Consumer experience includes but not limited to: | * Touch points (website, digital pages) * Quality of service/product |
| 1. Data collection channels include but not limited to: | * Surveys * Questionnaires * Focus groups * Journals * Feedback forms * Statistical reports |
| 1. Competitor activities include but not limited to: | * Price adjustment * Innovations/Renovations * Content revision |

| **REQUIRED SKILLS AND KNOWLEDGE** | |
| --- | --- |
| **Required skills**   * Creativity * Networking * Analytical * Communication * Presentation * Reporting * Monitoring and evaluating * Critical thinking * Resource utilization * Innovation * Writing | **Required Knowledge**   * Consumer behavior * Data collection * Engagement channels * Communication channels * Content creation * Customer service * Know Your Customer (KYC) * Policies and procedure * Balance Score card analysis * Basic procurement principles * Goal setting * Organization vision, mission, goals objectives and values * Monitoring and evaluating business operations * Report writing |

**EVIDENCE GUIDE**

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

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Identified target audience   2. Collected and analyzed customer insights   3. Prepared consumer insight report   4. Determined engagement purpose and channel   5. Selected tagline   6. Designed content aesthetics   7. Identified communication channel   8. Delivered content to audience   9. Analyzed audience response   10. Determined customer experience to be measured   11. Designed data collection channel   12. Analysed data collected   13. Identified consumer experience gap   14. Analyzed competitor activity   15. Created new processes   16. Prepared customer experience report |
| --- | --- |
| 1. Resource Implications | The following resources should be provided:   1. Access to relevant workplace or appropriately simulated 2. Environment where assessment can take place 3. Materials relevant to the proposed activity or tasks |
| 1. Methods of Assessment | Competency may be accessed through:   * 1. Written tests   2. Portfolio Assessment   3. Practical assignments   4. Role-play exercises   5. Performance Evaluation   6. Third party reports   7. Case studies |
| 1. Context of Assessment | Competency may be assessed individually in the actual workplace or simulated workplace environment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

**CONDUCT MARKETING COMMUNICATION ACTIVITIES**

**UNIT CODE: 0414 451 16A**

**UNIT DESCRIPTION**

This unit specifies the competencies required to conduct marketing communication activities. It involves determining communication content, identifying brand essence, collecting consumer insight, designing communication content, carrying out marketing communication, analyzing marketing communication feedback and preparing marketing communications activities report.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Determine Communications Content | * 1. Consumer behavior is surveyed as per the organization needs   2. Consumer behavior report is prepared as per the consumer survey   3. Communication channel behavior is analyzed as per organizational marketing policy   4. Business environment is analyzed as per business intelligence reports.   5. ***Communications content*** is identified as per organizational marketing objectives and communication procedures. |
| 1. Identify brand essence | * 1. Brand characteristics are identified as per organizational goals   2. ***Brand benefits*** are determined as per brand characteristics   3. Brand benefits are aligned with the marketing objectives as per marketing strategy   4. ***Brand essence*** is determined as per organizational goals |
| 1. Collect consumer insights | * 1. Consumer target group is determined as per marketing strategy   2. ***Data collection instruments*** are identified as per data collection methods   3. Budget for data collection is prepared as per budget procedures   4. ***Consumer insight*** data is collected as per data collection procedures   5. Data collected is analyzed as per methods of data analysis   6. Data collected is presented as per data presentation methods |
| 1. Design Communication content | * 1. ***Tag line*** is selected as per the brand strategy   2. Communication channel is determined as per marketing strategy   3. ***Content aesthetic*** is designed as per marketing current trends   4. Communication content is created as per communication plan and legal requirements |
| 1. Carry out marketing communication | * 1. Target audience is identified as per organization marketing strategy   2. ***Communication channel*** is identified as per target audience   3. Communication content is scheduled as per communication plan   4. Communication content is sent to audience as per communication schedule |
| 1. Analyze marketing communication feedback | * 1. Methods of collecting marketing communication feedback are identified as per organization policy   2. Marketing communication feedback is collected as per data collection methods   3. Target audience feedback is analyzed in as per data analysis methods |
| 1. Prepare a marketing communication activity report | * 1. Areas of concern are identified as per marketing communication objectives.   2. Marketing communication recommendations are communicated as per marketing communication policy and procedures |

**RANGE**

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

| **Variable** | **Range** |
| --- | --- |
| 1. Communication content may include but not limited to: | * Offers * New products * Working hours * Purchasing procedures * Advertisements |
| 1. Brand benefits may include but not limited to: | * Competitiveness * Customer recognition * Customer loyalty * Brand credibility |
| 1. Brand essence may include but not limited to: | * Brand characteristics * Brand benefits * Brand personality |
| 1. Data collection instruments may include but not limited to: | * Questionnaires * Interviews * Observations * Focus group discussion * Surveys |
| 1. Consumer insights may include but not limited to: | * Digital Media trends * Suggestions * Complaints * Complements/ compliments * Trends in human behavior |
| 1. Tag line may include but not limited to: | * Slogan * Catch phrase * Punch line |
| 1. Content aesthetics may include but not limited to: | * Color codes * Font type & size * Memes * Graphic Interchange Format (GIF) |
| 1. Communication channel may include but not limited to: | * Digital Media * Above the line communication (TV, Billboards, Radio) * Below the line communication (fliers, road shows) |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

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

**SKILLS**

The individual needs to demonstrate the following skills:

* Data analysis
* Planning
* Networking
* Communication
* Presentation
* Reporting
* Monitoring and evaluation
* Critical thinking

**EVIDENCE GUIDE**

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

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Determined Communications Content   2. Identified brand characteristics   3. Aligned brand benefits with marketing objective   4. Analyzed consumer insight data   5. Designed communication content   6. Carried out marketing communication   7. Analyzed marketing communication feedback   8. Prepared a marketing communication activity report |
| 1. Resource Implications | The following resources should be provided:   * 1. Access to relevant workplace or appropriately simulated   2. Environment where assessment can take place   3. Materials relevant to the proposed activity or tasks |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Written tests   2. Oral questioning   3. Third party reports   4. Case studies |
| 1. Context of Assessment | Competency may be assessed individually in the actual workplace or simulated workplace environment |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

**MANAGE DIGITAL MARKETING**

**UNIT CODE:** 0414 451 15A

**UNIT DESCRIPTION**

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

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

**RANGE**

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

| **Variable** | **Range** |
| --- | --- |
| Digital Marketing content may include but not limited to: | * Social media posts * Blog posts * Infographics * Videos * Podcasts * Email newsletters * E-books and white papers * Webinars * Interactive content * User-generated Content (UGC): * Case Studies/Testimonials |

| **REQUIRED SKILLS AND KNOWLEDGE** | |
| --- | --- |
| **Required skills**   * Creativity * Innovative * Analytical * Communication * Presentation * Reporting * Monitoring and evaluating * Critical thinking * Resource utilization * Technological * Networking | **Required Knowledge**   * Technology Trends * Patenting and licensing * Collaborations and Partnerships * Marketing Strategic Planning * Research and development * Policies and procedures * Market needs and gaps * Balance Score card analysis * Basic procurement principles * Tactical plans * Corrective action plan * Goal setting * Organization vision, mission, goals objectives and values * Monitoring and evaluating business operations * Report writing * Cost Benefit Analysis |

**EVIDENCE GUIDE**

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

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Digital marketing content is determined based as per marketing communication plan   2. Goals/ objectives for using digital marketing channels are defined in accordance with market analysis reports   3. Trend landscape and purchasing power is analyzed in accordance with industry reports   4. Conduct product/ service SWOT analysis as per marketing plan   5. Formulate strategy to market product/service based on marketing plan and the identified product/service strengths |
| --- | --- |
| 1. Resource Implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant assessment environment.   3. Resources relevant to the proposed assessment activity or tasks. |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Written tests   2. Practical assignments   3. Performance Evaluation   4. Third party reports   5. Case studies |
| 1. Context of Assessment | This competency may be assessed in a workplace or in a simulated workplace |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

**CONDUCT MARKET INNOVATIONS/RENOVATIONS**

**UNIT CODE:** 0414 451 16A

**UNIT DESCRIPTION**

This unit specifies the competencies required to conduct market innovations/renovations. It involves conducting market assessment, creating prototype, conducting final product launch and post-launch evaluation.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Conduct market assessment | * 1. Market needs are identified as per industry.   2. Competition is assessed as per industry.   3. Target audience is analyzed as per marketing strategy   4. Market assessment report is prepared as per target audience feedback |
| 1. Create product prototype | * 1. Prototype objective is established as per marketing strategy.   2. ***Prototype*** views are gathered as per market report   3. Prototype ideas are developed as per assessment report   4. Prototype feedback is analyzed as per consumer feedback   5. Prototype report is prepared as per consumer feedback |
| 1. Conduct final Product launching | * 1. Prototype is tested as per innovations procedure   2. Final prototype is approved as per innovations policy.   3. **Roll out plan** is adopted as per innovations procedure.   4. Roll out budget is adopted and approved as per budgetary procedures.   5. Final product is launched in accordance with Roll out plan. |
| 1. Conduct post Launch Evaluation | * 1. Product feedback is gathered as per innovations procedures.   2. Product feedback is evaluated as per innovations procedures   3. **Product renovation** is adopted as per feedback report.   4. Renovated product is redeployed to the market as per roll out plan   5. Product optimization is maintained as per renovation strategy. |

**RANGE**

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

| **Variable** | **Range** |
| --- | --- |
| 1. Prototype may include but not limited to: | * Product * Service * Process |
| 1. Roll out plan may include but not limited to: | * Activity calendar * Promotions * Route to market plan * Allocated budget |
| 1. Product renovation may include but not limited to: | * Product * Service * Process   (e.g. repackaging, distribution channels, rebranding) |

**REQUIRED KNOWLEDGE AND UNDERSTANDING**

The individual needs to demonstrate knowledge of:

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

**SKILLS**

The individual needs to demonstrate the following skills:

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

**EVIDENCE GUIDE**

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

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Conducted market assessment   2. Created product prototype   3. Conducted final product launching |
| 1. Resource Implications | The following resources should be provided:   * 1. Access to relevant workplace or appropriately simulated   2. Environment where assessment can take place   3. Materials relevant to the proposed activity or tasks |
| 1. Methods of Assessment | Competency may be assessed through:   * 1. Written tests   2. Third party reports   3. Case studies |
| 1. Context of Assessment | This competency may be assessed in a workplace or in a simulated workplace. |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

# DEVELOP BRAND STRATEGY

**UNIT CODE:** 0414 551 17A

**UNIT DESCRIPTION**

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

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| * + - 1. Develop Brand Objectives | * 1. **Brand objectives** are developed in accordance with organization’s overall business strategy   2. Target audience is identified in accordance with target market research analysis   3. Brand evaluation is determined in accordance with organization’s overall business strategy. |
| Develop Brand Identity | 2.1 Brand persona is determined in accordance with marketing plan  2.2 Brand competitor analysis is carried out in accordance with market research analysis.  2.3 Brand competitor report is prepared as per research analysis  2.4 Brand visuals are developed in accordance with brand competitor report |
| Develop brand positioning | 3.1 Brand purpose is defined in accordance with the overall objectives  3.2 Target audience is reviewed in accordance market research analysis  3.3Market is defined in accordance with industry reports.  3.4 Brand competition is analyzed in accordance with competition analysis report.  3.5 Brand positioning statement is selected in accordance with overall objectives |
| Execute brand Launch | 4.1 ***Brand launch*** strategy is developed in line with organizational procedures  4.2 Brand launch timelines are set in accordance with promotional campaign plan  4.3 Brand infrastructure is determined in line with the marketing budget  4.4 Brand hype is built in line with campaign plan  4.5 Brand launch is carried out in line with market research analysis |

**RANGE**

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

| **Variable** | **Range** |
| --- | --- |
| 1. Brand objectives may include but not limited to: | * Volume growth * Brand visibility * Brand awareness * Brand loyalty * Industry leader * Award winner |
| 1. Brand launch may include but not limited to: | * Brand Equity * Market share * Revenue * Profit |

| **REQUIRED SKILLS AND KNOWLEDGE** | |
| --- | --- |
| **Required skills**   * Creativity * Social media savvy * Research * Analysis * Problem Solving * Written Communication * Strategic Planning * Networking * Emotional Intelligence * Critical thinking * Resource utilization | **Required Knowledge**   * Product/service branding * Content marketing strategy * Brand identity * Brand awareness * Brand equity * Brand positioning * Target audience * Market trends * Brand values and purposes * Brand driven insights * Customer behavior * Sales and profitability ratios * Brand positioning * Strategic plan * Goal setting * Organization vision, mission, goals objectives and values * Monitoring and evaluating * Report writing * Regulatory bodies * Legal requirements |

**EVIDENCE GUIDE**

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

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   1. Determine brand identity and audience as per brand strategy 2. Reassess brand offering in line with industry reports 3. Analyze brand identity against market plan 4. Carry out customer satisfaction according to consumer survey 5. Measure brand impact in accordance with campaign plan |
| --- | --- |
| 1. Resource Implications | The following resources must be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place |
| 1. Methods of Assessment | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant assessment environment.   3. Resources relevant to the proposed assessment activity or tasks. |
| 1. Context of Assessment | Competency in this unit may be assessed through:   * 1. Practical   2. Project   3. Third party report   4. Portfolio of evidence   5. Written test |
| 1. Guidance information for assessment | This competency may be assessed in a workplace or in a simulated workplace. |

# DEVELOP DISTRIBUTION CHANNELS

**UNIT CODE:** 0414 551 18A

**UNIT DESCRIPTION**

This unit specifies the competencies required to develop distribution channels. It involves identify target partners, select distribution channels, implement distribution programs and evaluate trade channel performance.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| * + - 1. Identify target partners | * 1. Target market is defined in line with marketing objectives   2. Networking events are selected as per marketing strategy   3. ***Partnership capabilities*** are evaluated in accordance business objectives   4. Partnership cost are evaluated in accordance with marketing budget   5. Partnership expertise and resources are assessed in line with marketing strategies |
| * + - 1. Select Distribution channels | 2.1 ***Distribution options*** are evaluated as per the marketing strategy  2.2 Distribution channel chosen in line with goals and target market  2.3 Distribution agreements are negotiated in accordance with marketing strategy  2.4 Distribution plan is created as per the marketing plan |
| * + - 1. Implement Distribution Programs | 3.1 Distribution centers are set up in accordance with the marketing plan  3.2 Logistics are coordinated as per the marketing plan  3.3 Channels are monitored as per the strategic plan |
| * + - 1. Evaluate trade Channel Performance | 4.1 ***Sales quota*** attainment is measured in accordance with the sales set targets  4.2 Inventory levels are assessed in line with the preset levels  4.3 Delivery time is analyzed against market research analysis  4.4 Quality and delivery timeliness is assessed as per strategy plan  4.5 Market share is analyzed in line with the market research analyzed. |

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| **Variable** | **Range** |
| --- | --- |
| 1. Partnership capabilities may include but not limited to: | * Strategic alignment * Effective communication * Good governance * Negotiation and contract management * Resource sharing and allocation * Willingness to adapt * Conflict resolution and mediation |
| 1. Distribution options | * Direct sales * Retail distribution * E-commerce * Franchising * Brick and mortar stores * Drop shipping * Independent distribution * Wholesaler * Exclusive distribution * Selective distribution |
| 1. Sales Quota | * Activity quota * Profit quota * Volume quota * Forecast quota * Combination quota |

**ENABLERS**

| **REQUIRED SKILLS AND KNOWLEDGE** | |
| --- | --- |
| **Required skills**   * Analytical * Communication * Presentation * Reporting * Monitoring and evaluating * Critical thinking * Resource utilization | **Required Knowledge**   * Organization’s and market regulations * Competitor activities * Trade channels * Route to market * Logistics * Marketing technology * Consumer trends * Branding * Business Strategic Planning * Policies and procedures * Business operations * Balance Score card analysis * Basic procurement principles * Tactical plans * Corrective action plan * Goal setting * Organization vision, mission, goals objectives and values * Monitoring and evaluating operations * Report writing |

**EVIDENCE GUIDE**

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

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Establish marketing objectives as per marketing plan   1.2Determine budgeting method in line with set objectives  1.3Analyze current competitor landscape and internal capacities against the industry report   * 1. Evaluate marketing budget plan as per budgeting objective |
| --- | --- |
| 1. Resource Implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant assessment environment.   3. Resources relevant to the proposed assessment activity or tasks. |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   * 1. Practical   2. Project   3. Third party report   4. Portfolio of evidence   5. Written test |
| 1. Context of Assessment | This competency may be assessed in a workplace or in a simulated workplace. |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

# CONDUCT MARKET ANALYSIS

**UNIT CODE:** 0414 551 19A

**UNIT DESCRIPTION**

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

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

**RANGE**

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

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

| **REQUIRED SKILLS AND KNOWLEDGE** | |
| --- | --- |
| **Required skills**   * Arithmetic * Analytical * Computer – Excel, PowerPoint, Word, SPSS * Communication * Statistical * Presentation * Management reporting * Research * Critical thinking * Resource utilization * Problem Solving * Time management | **Required Knowledge**   * Market analysis objective * Market segmentation * Industry landscape * Policies and procedures * Market analysis tools * Data analysis * Market analysis budget * Marketing environment * Research methods * ICT * Marketing environment * Report writing |

**EVIDENCE GUIDE**

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

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Analyzed marketing environment   2. Carried out SWOT analysis   3. Reviewed marketing objectives   4. Undertook/ conducted market segmentation   5. Selected target market segment   6. Determined data collection method   7. Demonstrated ability to apply data collection tools   8. Analyzed data collected   9. Prepared a market analysis report |
| --- | --- |
| 1. Resource Implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant assessment environment.   3. Resources relevant to the proposed assessment activity or tasks. |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   * 1. Practical   2. Project   3. Third party report   4. Portfolio of evidence   5. Written test |
| 1. Context of Assessment | This competency may be assessed in a workplace or in a simulated workplace. |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sub sector, workplace and job roles is recommended. |

# CONDUCT PROMOTIONAL CAMPAIGN

**UNIT CODE: 0414 551 18A**

**UNIT DESCRIPTION**

This unit specifies the competencies required to conduct promotional campaign. It involves Develop Marketing communication content, selecting promotional channels, determining promotional materials and executing promotional campaign

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| 1. Develop Marketing communication content | 1.1 Marketing communication content objectives are identified as per the marketing plan.  1.2 ***Tag line*** is selected in accordance with brand strategy  1.3 Content ***aesthetic*** is designed in accordance with marketing trends  1.4 ***Communication content*** is created in accordance with communication plan |
| 2. Select promotional communication channels | 2.1 Target audience is identified in accordance with marketing strategy  ***2.2 Promotional communication channel*** is identified in accordance with target audience  2.3 Promotional Communication content is tailored with channels in accordance with communication plan |
| 3. Determine promotional materials | 3.1 Target audience is identified in accordance with marketing plan  3.2 Promotional objectives are defined in line with marketing plan  3.3 Brand identity is selected in accordance with marketing plan |
| 4. Execute promotional campaign | 4.1 Goals are established in line with marketing plan  4.2 Target audience is identified in line with market reports  4.3 Promotional message as per the target audience  4.4 Promotional media mix are determined in accordance with marking plan.  4.5 ***Promotional materials*** are identified in line with marketing plan  4.6. Promotional campaign is launched as per the marketing plan  4.7 Promotional campaign is analyzed as per standard procedures |

**RANGE**

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

| **Variable** | **Range** |
| --- | --- |
| 1. Tag line may include but not limited to: | * Brevity * Simplicity * Specificity * Believably * Uniqueness * Alignment * Memorability * Consistency |
| 1. Content aesthetics | * Color codes * Font type & size * Memes * Graphic Interchange Format (GIF) |
| 1. Communication content | * Advertisements * Social media posts * Sales promotions * Content marketing * Direct mail * Influence partnerships |
| 1. Promotional Communication channel may include but not limited to: | * Digital Media * Above the line communication (TV, Billboards, Radio) * Below the line communication (fliers, road shows) |

**REQUIRED SKILLS AND KNOWLEDGE**

|  |  |
| --- | --- |
| **Required skills**   * Data analysis * Planning * Networking * Communication * Presentation * Reporting * Monitoring and evaluating * Critical thinking * Resource utilization | **Required Knowledge**   * Communication channels * Website * Social media * Direct marketing * Digital marketing * Consumer insights * Brand essence * Communication legal aspects * Business operations * Basic procurement principles * Communication plans * Data analysis * Corrective action plan * Goal setting * Organization vision, mission, goals objectives and values * Monitoring and evaluating * Budgeting   Report writing |

**EVIDENCE GUIDE**

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

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Determine brand characteristics, benefits and essence in line with brand objectives   2. Evaluate consumer insight data according to customer analysis   3. Select tagline according to brand strategy   4. Develop communication content according to marketing plan   5. Identify audience and communication channel as per the marketing plan |
| --- | --- |
| 1. Resource Implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant assessment environment.   3. Resources relevant to the proposed assessment activity or tasks. |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   * 1. Practical   2. Project   3. Third party report   4. Portfolio of evidence   5. Written test |
| 1. Context of Assessment | This competency may be assessed in a workplace or in a simulated workplace. |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |

# DEVELOP MARKETING BUDGET

**UNIT CODE:** 0414 551 19A

**UNIT DESCRIPTION**

This unit specifies the competencies required to develop marketing budget. It involves developing marketing plan, allocating marketing resources, monitoring marketing expenditures and evaluating marketing budget marketing plan

| **ELEMENT**  These describe the **key outcomes** which make up **workplace function**. | **PERFORMANCE CRITERIA**  These are **assessable** statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the range.*** |
| --- | --- |
| * + - 1. Develop marketing plan | * 1. Customer is analyzed in accordance with the existing market   2. Marketing goals are created in accordance with the business objectives   3. Customer is segmented as in accordance with the consumer behavior.   4. Customers are targeted in accordance with the strategy   5. Marketing action plan is initiated in accordance with the objectives |
| * + - 1. Allocate marketing resources | 2.1 Purpose is identified in accordance with the marketing objectives  2.2 Target audience is identified as per market research analysis  2.3 ***Marketing Resources*** are identified as per the marketing plan  2.4 Marketing Resources are assigned in accordance with the marketing plan |
| * + - 1. Monitor Marketing expenditures | 3.1 ***Marketing Expenditure*** ***tracking mechanisms*** are selected in accordance with the marketing budget  3.2 Expenditures are identified as per the allocated budget  3.3 Expenditure is reviewed in accordance with allocated budget |
| * + - 1. Evaluate marketing budget plan | 4.1 ***KPIs*** are set as per the industry standards  4.2 Performance is analyzed as per the objectives  4.3 Feedback is obtained as per the objectives |

**RANGE**

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

| **Variable** | **Range** |
| --- | --- |
| 1. Marketing resources may include but not limited to:- | * Personnel allocation * Budget * Schedules |
| 1. Marketing expenditure tracking mechanism | * Marketing budget * Receipts * Petty cash * Financial dashboards * Accounting software |
| 1. KPIs | * ROI * Cost per acquisition * Customer acquisition value * Customer Lifetime Value * Customer acquisition cost * Marketing return on advertising spent |

| **REQUIRED SKILLS AND KNOWLEDGE** | |
| --- | --- |
| **Required skills**   * Arithmetic * Logical * Analytical * Communication * Presentation * Reporting * Monitoring and evaluating * Critical thinking * Resource utilization | **Required Knowledge**   * Marketing environment * Budgetary control * Policies and procedures * Business operations * Balance Score card analysis * Basic procurement principles * Tactical plans * Standard operating procedures * Corrective action plan * Goal setting * Organization vision, mission, goals objectives and values * Monitoring and evaluating business operations * Report writing |

**EVIDENCE GUIDE**

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

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:   * 1. Establish marketing objectives as per marketing plan   2. Determine budgeting method in line with set objectives   3. Analyze current competitor landscape and internal capacities against the industry report   4. Evaluate marketing budget plan as per budgeting objective |
| --- | --- |
| 1. Resource Implications | The following resources should be provided:   * 1. Appropriately simulated environment where assessment can take place.   2. Access to relevant assessment environment.   3. Resources relevant to the proposed assessment activity or tasks. |
| 1. Methods of Assessment | Competency in this unit may be assessed through:   * 1. Practical   2. Project   3. Third party report   4. Portfolio of evidence   5. Written test |
| 1. Context of Assessment | * 1. This competency may be assessed in a workplace or in a simulated workplace. |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended. |