



BSBMKG435

Analyse Consumer Behaviour

Assessment 2 of 3

Case Study and Role Play

Assessor Guide



Assessment Instructions

Task overview

This assessment task is divided into **three (3)** case studies with associated tasks to complete. Read each question carefully before typing your response in the space provided.

Additional resources and supporting documents

To complete this assessment, you will need to access:

- CBSA website
- CBSA resources provided within the assessment document
- CBSA Marketing Plan (provided on LMS)
- CBSA Business Plan (provided on LMS)
- Australian Bureau of Statistics website

Assessment Information

Submission

You are entitled to three (3) attempts to complete this assessment satisfactorily. Incomplete assessments will not be marked and will count as one of your three attempts.

All questions must be responded to correctly to be assessed as satisfactory for this assessment.

Answers must be typed into the space provided and submitted electronically via the LMS. Hand-written assessments will not be accepted unless previously arranged with your assessor.

Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

- the processes for conducting the assessment (e.g. allowing additional time)
- the evidence gathering techniques (e.g. oral rather than written questioning, use of a scribe, modifications to equipment)

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.



Please consider the environment before printing this assessment.



The following assessment tasks use a simulated business called Complete Business Solutions Australia (CBSA). To complete the assessment tasks, students will need to access information, templates, policies and procedures associated with CBSA. These documents can be accessed on CBSA's intranet accessible via the website. To access; head to www.cbsa.com.au.

Attached to this assessment is the CBSA Marketing Plan that you will need throughout the assessment. This can be downloaded on assessment landing page. This document will be referenced in the assessment.

In the following Case Studies, you will be playing the role of Tina Hughes. Tina is the Sales and Marketing Manager at CBSA. You report directly to Gavin Stead who is the Managing Director. If you require any information please review the CBSA Business Plan and the CBSA Marketing Plan.

Case Study 1 - Intern Briefing

To begin this task please read the following email and its attachment, then complete the tasks that are associated with this case study.

Paste Basic Text Names Include Attach File via Link Loop Components Tags Dictate Sensitivity Editor Immersive Reader New Scheduling Poll Open Grammarly Viva Insights View Templates											
	<table border="1"> <tr> <td>To</td> <td>Tina Hughes [tina.hughes@cbsa.com.au]</td> </tr> <tr> <td>From</td> <td>Gavin Stead [gavin.stead@cbsa.com.au]</td> </tr> <tr> <td>Date/ Time</td> <td>Monday 11 a.m.</td> </tr> <tr> <td>Subject</td> <td>Intern Briefing</td> </tr> <tr> <td>Attachment</td> <td>Product/Service Features Template.docx, Newspaper Advert.docx, ABC Newspaper Advert.docx</td> </tr> </table>	To	Tina Hughes [tina.hughes@cbsa.com.au]	From	Gavin Stead [gavin.stead@cbsa.com.au]	Date/ Time	Monday 11 a.m.	Subject	Intern Briefing	Attachment	Product/Service Features Template.docx, Newspaper Advert.docx, ABC Newspaper Advert.docx
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<p>Good morning Tina,</p> <p>I have agreed to accept three interns [trainees] from our local college for work experience. During their time with CBSA, they will be undertaking a number of projects across the organisation.</p> <p>I would like you to brief them on CBSA's market and provide them with information on the features of the bookkeeping services you are considering focusing on as part of our local growth strategy.</p> <p>This information will assist the new trainees who will be working with 2 new business's that we will be assisting with their bookkeeping services.</p> <p>Attached is:</p> <ol style="list-style-type: none"> 1. a template for you to use to layout the features and benefits of the bookkeeping service 2. the newspaper advertisement for bookkeeping which I authorised for print today 3. Abacus Bookkeeping's newspaper advert for your competitor file <p>As well attached is the CBSA Marketing Plan for you to use. This will help assisting you to review the tasks and fill them out.</p> <p>Please see your task instructions below.</p>											

Please submit your briefing paper for approval by COB Thursday.

Kind Regards,

Gavin Stead
Managing Director
300 Fictional Way, Sydney, NSW 2000
Phone: 1800 111 222
www.cbsa.com.au



Attachments

1. Product/ Service Features Template

PRODUCT/SERVICE FEATURES TEMPLATE	
Product/service features	Benefits for the client
<<Describe/name the service>>	
<<Explain its purpose>>	Example: It meets the need for xxx and saves time and money
<<How it works>>	
<<How it is delivered>>	
<<Support provided by CBSA>>	
<<The deliverables/tangible features>>	
<<Its price>>	
<<How it compares to similar services provided by competitors>>	
<<Other products/services that might complement it>>	

2. Newspaper Advert

**Financial records in a mess?
Need a bookkeeper?**

We can help you!

Here at CBSA, we believe that bookkeeping and pricing should be as individualised and unique as your business.

CBSA offers fully customised affordable build-your-own monthly packages or hourly bookkeeping.

We provide you with:

- Reports on accounts receivable and payable
- Weekly or monthly cash flow statements
- Preparation and submission of BAS
- Bank reconciliation statements
- Quarterly financial reports
- Payroll statements
- Debtor reports

Plus

We provide you with a choice of a dedicated bookkeeper who comes to you or an affordable online service!

And

The ability to tap into our extensive range of other business services on an 'as needs' basis.

Our bookkeeping solutions help your business with three main goals:

- Efficient management
- Affordable pricing
- Accuracy

When it comes to financial management, CBSA is your business expert.

Contact us today for a quote.

www.cbsa.com

Tel: XXXXXX

3. ABC Newspaper Advert Doc

We keep the books So you can focus on the bottom line

***Fixed Fee Packages from \$199 per month**

Keep your budget in line as we provide you with an online service for all your bookkeeping needs: bank reconciliation, accounts payable, accounts receivable and payroll.

All this for a convenient monthly fixed fee package enabling you to focus on the bottom line and manage your cash flow.

*Monthly fees are dependent on the number of employees and average number of monthly transactions

Abacus Bookkeeping

Local, affordable, friendly service

Call us on 1300XXXX

Task 1 Instructions

Based on the email, write a paper appropriate for the purpose of briefing or informing a group of interns about the CBSA market.

Before writing the paper that is outlined below. Complete the Product/ Services Features Template. This information will help you to create the Intern Briefing.

Use the headings provided.

Intern Briefing

1. Background

- a) Describe the market for business services/consultancy in Australia
- b) Identify some of the leading players in the market and what they offer.

2. CBSA's Products and Services

- a) Provide a summary of the products and services CBSA offers.
- b) Identify the features of the bookkeeping service. [Use the attached template to format your answer.]
- c) What is the message CBSA uses to appeal to its customers/consumers?

3. CBSA's Clients

- a) Identify who CBSA customers/consumers are.
- b) Explain how business-to-business (B2B) consumer behaviour differs from consumer behaviour in the business-to-consumer (B2C) context. Assess the reasons for this.
- c) Investigate and identify a minimum of 5 key characteristics of small and medium-size businesses (under 200 employees) as they apply to CBSA customers. Explain your findings in approximately 150 words.
- d) Based on your research, assess the needs of these consumers for CBSA products.
- e) Can you go online and research some possible software (digital) that can be used to help with marketing CBSA Bookkeeping Product/ Service?
- f) Can you also do some research online looking at potential software that can help analyse and collate data relating to consumer behaviour analysis? Please find three (3) examples.
- g) Can you do some research online to help explain to the interns legal and regulatory responsibilities behaviour analysis. What are some resources can they refer to, to assist them?

To complete 3 (c) and 3 (d) you should consult the Australian Bureau of Statistics website findings (see <https://www.abs.gov.au/statistics/industry/technology-and-innovation/characteristics-australian-business/latest-release>) as well as using other sources that you may find in your library or on the internet. List your sources

Assessor Instructions

Purpose of the Task

This task requires students to source information on the market for CBSA services and identify features of the services and the attributes of CBSA's clients [consumers]

Task 1A: Background

PRODUCT/SERVICE FEATURES TEMPLATE	
Product/service features	Benefits for the client

Bookkeeping Service	
<<Explain Its purpose>>	At CBSA, we believe that bookkeeping and pricing should be as individualised and unique as your business.
<<How it works>>	CBSA offers fully customised affordable build-your-own monthly packages or hourly bookkeeping.
<<How it is delivered>>	sending a bookkeeper into the business or providing the service online
<<Support provided by CBSA>>	<ul style="list-style-type: none"> ▪ Reports on accounts receivable and payable ▪ Weekly or monthly cash flow statements ▪ Preparation and submission of BAS ▪ Bank reconciliation statements ▪ Quarterly financial reports ▪ Payroll statements ▪ Debtor reports
<<The deliverables/tangible features>>	<ul style="list-style-type: none"> ▪ Efficient management ▪ Affordable pricing ▪ Accuracy ▪ deliverables such as financial reports, payroll statements,
<<Its price>>	<ul style="list-style-type: none"> ▪ the hourly rate for the service as noted on page 5 of the CBSA Business Plan
<<How it compares to similar services provided by competitors>> Identify two [2] differences	<ul style="list-style-type: none"> ▪ Students are to identify at least two differences between the service offered by CBSA and Abacus.
<<Other products/services that might complement it>>	<ul style="list-style-type: none"> ▪ services that may complement it such as training, software or compliance.

a) Describe the market for business services/consultancy in Australia

Approximate Word Count: 20-30 words

Students responses must address the following points:

- Business Administration and Governance
- Business Communication

- Business Leadership and Management
- Specialised Business Services.

b) Identify some of the leading players in the market and what they offer. Identify at least three [3] players in the market.

Approximate Word Count: 20-40 words

Students are to identify three leading players in the market and what they offer. Responses may include companies such as:

- KPMG. [Audit and Assurance, Deal Advisory, Legal, Consulting, Tax, Risk Consulting]
- Ernst and Young [Consulting, Strategy and Transaction, Tax]
- Deloitte [Tax, Advisory and Transactions, Compliance, Technology Consulting, Payroll]
- PwC [Cyber security, digital services, Financial Risk, Forensic Science, Management and Contract compliance, consulting]
- Grant Thornton [insurance, tax, consulting, financing growth, risk management]

Task 1B: CBSA's Products and Services

a) Provide a summary of the products and services CBSA offers.

Approximate Word Count: 40-60 words

CBSA's services are listed on page 5 of the Business Plan these include the items below:

- financial services: budgeting, payroll, accountancy, bookkeeping, financial planning
- information technology services including systems analysis and integration, website/software development, network security, IT support
- business services including HR, auditing, branding and styling, legal advice, business compliance and administration
- training services.

b) Identify the features of the bookkeeping service. [Use the attached template to format your answer.]

Approximate Word Count: 80-120 words

Students answers need to address the following points:

- its purpose in simple terms, e.g. Bookkeeping: recording business transactions and producing financial statements
- how it works, e.g. establishing a ledger; collecting invoices, payments, receipts and recording them in the ledger on a daily basis
- how it is delivered: sending a bookkeeper into the business or providing the service online

- the support provided such as software
- deliverables such as financial reports, payroll statements,
- the hourly rate for the service as noted on page 5 of the CBSA Business Plan

c) What is the message CBSA uses to appeal to its customers/consumers?

Approximate Word Count: 10-20 words

CBSA is making a rational appeal to the customer's need for expertise

Task 1C: CBSA's Client

a) Identify who CBSA customers/consumers are.

Approximate Word Count: 10-20 words

CBSA's client are small, medium and enterprise size (large) organisations (see page 2 of the Business Plan)

New clients in the marketing plan include KidFedora Cotoure & Home Tech Solutions.

b) Explain how business-to-business (B2B) consumer behaviour differs from consumer behaviour in the business-to-consumer (B2C) context. Assess the reasons for this.

Approximate Word Count: 40-60 words

Students answers need to address the following points:

- The difference between consumer and business markets is how decisions are made and the length of the buying cycle.
- The purchasing processes in business being more formal and the numbers of people/stakeholders involved much larger.
- The B2B consumer is less emotional and more logical

c) Investigate and identify 5 key characteristics of small and medium-size businesses (under 200 employees) as they apply to CBSA customers.

Approximate Word Count: 40-60 words

Students answers need to address 5 of the following points:

- use of technology and barriers to productivity such as lack of funding,
- skills shortages and lack of expertise.
- Run by a single individual or a small team
- Physical location or online operation
- Sole employment
- Existing in one or more sectors in the economy

- Revenue of 1 million to 40 million

Students must provide references as to where they sourced the 5 characteristics.

d) Based on your research, assess the needs of these consumers for CBSA products.

Approximate Word Count: 30-50 words

Students answers need to address the following points:

- needs from the barriers to productivity identified on the ABS website.
- expertise of various sorts [governance, financial planning etc.]
- financial services such as bookkeeping.

e) Can you go online and research some possible software [digital] that can be used to help with marketing CBSA Bookkeeping Product/ Service?

Provide five (5) examples

Approximate Word Count: 10-20 words

Students need to research online potential marketing software that CBSA can use to assist with the marketing of their Bookkeeping product/ service and provide 5 examples.

Potential answers the student may identify include:

- Google Analytics
- Mail Chimp
- Campaign Monitor
- Marketo
- Monday.com
- Hubsport
- Pardot
- LeadsBridge
- Podium
- Brevo
- TikTok Ads Manager

f) Can you also do some research online looking at potential software that can help analyse and collate data relating to consumer behaviour analysis? Please find three (3) examples.

Approximate Word Count: 30-50 words

Students need to research online potential software that analyses consumer behaviour. They need to identify 3 examples.

Some potential answers include:

- Brandwatch

- Dynatrace
- GWI
- Capterra
- Mixpanel

f) Can you do some research online to help explain to the interns legal and regulatory responsibilities behaviour analysis. What are some resources can they refer to, to assist them? Provide at least two [2] examples.

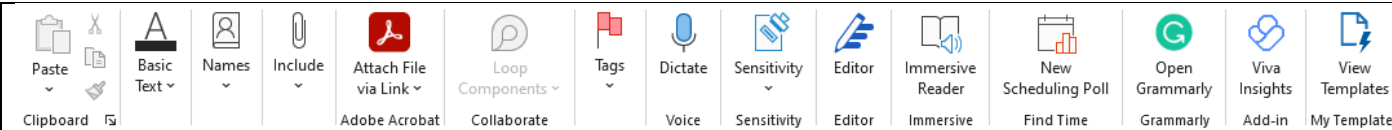


Approximate Word Count: 30-50 words

Students will need to research online legal and regulatory responsibilities behaviour analysis. Some potential answers include:

- Association of Behavioural Analysis Australia- Code of Ethical Practice
- BACB- Ethics Code for Behavioural Analysis

Case Study 2 - Presentation to Interns

To begin this task please read the following email and its attachment, then complete the tasks that are associated with this case study.

		
	To	Tina Hughes [tina.hughes@cbsa.com.au]
	From	Gavin Stead [gavin.stead@cbsa.com.au]
	Date/ Time	Friday 9.30 a.m.
	Subject	Intern Briefing Presentation
	Attachment	
<p>Good morning Tina,</p> <p>Thanks for your briefing paper. Great work!</p> <p>The interns are due to start on Monday. As part of their induction, I will arrange for you to meet with them, so they have an opportunity to ask questions.</p> <p>I would like for you to create a presentation for the interns explaining CBSA. Using the Business and Marketing Plan can you present this to the interns. This presentation should be 10-15 minutes long. In your presentation can you cover the following area:</p> <ul style="list-style-type: none"> • Explaining CBSA • Explaining CBSA Bookkeeping Service • Explaining what work we have done to market and promote CBSA Bookkeeping service • Review the CBSA Survey Results that are included in the Marketing Plan and identify 3 potential areas of improvement that you want the interns in their work to begin amending • Identifying 3 things you have learnt from the results of the survey about past marketing performance • Review the survey data to determine customers digital footprint and their engagement with CBSA • Overview of the two new clients we have got coming aboard <p>I would also like you to spend some time exploring their interests, so you can decide what project or projects you might have that would suit them to work on.</p> <p>Kind Regards,</p>		
<p>Gavin Stead Managing Director 300 Fictional Way, Sydney, NSW 2000 Phone: 1800 111 222 www.cbsa.com.au</p>		

Task 2 Instructions

Based on the email complete the following task:

- Undertake a briefing presentation with the interns (role played by your assessor and classmates)

- Use at least one digital tool to enhance your presentation. Appropriate tools include PowerPoint or similar application; Prezi; an infographic that you designed; a video or other media. It may also be presented using a meeting app if this is available and approved by the assessor.
- You should address CBSA's client/consumer attributes and the features and benefits of CBSA's bookkeeping services
- At the conclusion of the briefing, you are to use questioning and listening skills to explore the interests of attendees in marketing and assess what projects they might be interested in undertaking.
- The briefing session, including questions and answers, should take between 10 and 15 minutes

The assessor will organise a workspace area and discuss and approve the technology you require for the briefing presentation.

Role play instructions

The role play/meeting must include at least number 3 participant/s, must not exceed 10-15 minutes duration and must address all elements of the Observation Checklist below.

In this task you will participate in a role/play meeting with others. These may be resourced using one of the following options:

1. Peer/s who you are already working with, in the industry your qualification relates to.
2. Fellow student/s who will play the role of a team member. Please contact your fellow student/s via the Discussion Forum and coordinate your role play with them directly.

If you are unable to find a participant/s to play the role of the other team member/s, contact your assessor via the Discussion Forum who will discuss options for pairing up with another student/s to complete this task.

Option 1: Peer/s participant

Should you complete this task with your Peer/s, you must fully brief all participant/s, providing them with the context to the role play/meeting, a role outline to play and a copy of the observation checklist so that they can prepare for the recording.

Peer/s will need to state their name and job title at the start of the recording to inform consent.

Option 2: Fellow student/s participant

Fellow student/s participating in the recording must be provided with context to their role and responsibilities in the session and have reviewed the assessment activity and observation checklist so that they can prepare for the recording.

Student/s will need to state their name and that they are a student (as their job title) at the start of the recording to inform consent.

Character Instructions

In this role play you will have three (3) other characters that you will be presenting to. The three characters will be the three new interns. The student will ask about your interest in marketing and projects you may be interested in undertaking.

During the role play

Intern 1	<p>Interests in Marketing:</p> <ul style="list-style-type: none"> • I really enjoy the research aspect of it, looking at data and analytics and how it informs work <p>Projects you are interested in:</p> <ul style="list-style-type: none"> • Working with teams to help them with data like the bookkeeping project
Intern 2	<p>Interests in Marketing:</p> <ul style="list-style-type: none"> • I like the ideas of liasing with clients and going to events etc <p>Projects you are interested in:</p> <ul style="list-style-type: none"> • I like working with computers and technology
Intern 3	<p>Interests in Marketing:</p> <ul style="list-style-type: none"> • I am interested in the idea of writing and creating campagnes and doing the creative side <p>Projects you are interested in:</p> <ul style="list-style-type: none"> • Helping to design and explain the content for social use, my background before studying was early childhood education

Recording instructions

Your role play must be recorded with all participant/s captured in a virtual room using a system such as Zoom, Skype or Teams.

Consent to participate in the recording must be captured for all participant/s at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying their name and job title to inform consent.

"This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. All participant/s in this session indicate their consent to be included in this recording by stating their name and job title."

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Include this recording as part of your assessment submission.

Assessor Instructions

Purpose of the Task

This task is to assess the students' oral foundation skills. It requires students to provide a presentation in the form of a briefing. This is followed by gathering information about the audience (interns) on their interests.

Guidance to Assessors About this Task

Organise a workspace area for the presentations to take place. You will need an additional three students to play the roles of the interns. Since the presentation takes place in a meeting, students may either sit or stand, whichever is most comfortable for them, but they must be facing their audience.

Students may swap roles after each presentation, so each of them has the opportunity to complete their presentation in the duration of the session.

You must ensure that the student gives a presentation between 10 and 15 minutes in length, using one or more digital tools, to provide an overview of:

- CBSA's market for its products and services
- CBSA client/consumer attributes
- an outline of the features and benefits of the CBSA bookkeeping service.

Ensure that they utilise oral communication skills, demonstrating the following:

- They can present information using relatively formal language, but with limited jargon, pitched at a trainee/student audience.

Use questioning and active listening (such as head nodding and paraphrasing to check for understanding) to gather information on marketing interns' interests.

Observation Checklist

Observation	S	NYS	Comments
1. The student has explained what CBSa and CBSA Bookkeeping services	<input type="checkbox"/>	<input type="checkbox"/>	The student: <ul style="list-style-type: none">• Has explained what CBSA is and their services based off the marketing plan and business plan. They explained the bookkeeping service CBSA provides.
2. The student presents information using suitable words and non-verbal features	<input type="checkbox"/>	<input type="checkbox"/>	The student: <ul style="list-style-type: none">• They can present information using relatively formal language, but with limited jargon, pitched at a trainee/student audience.
3. The student completes the roll play in the allocated timing	<input type="checkbox"/>	<input type="checkbox"/>	The student: <ul style="list-style-type: none">• The student must present their presentation between 10-15 m,inutes in length
4. The student has used an appropriate digital tool to use with their presentation	<input type="checkbox"/>	<input type="checkbox"/>	The student: <ul style="list-style-type: none">• The student has used an appropriate digital tool to assist them with the presentation . Using Microsoft Powerpoint, Work, Excel etc.

5. The student addresses the CBSA client/ consumer attributes and features	<input type="checkbox"/>	<input type="checkbox"/>	<p>The student:</p> <ul style="list-style-type: none"> The student explains CBSA's market for its products and services and CBSA client/consumer attributes
6. The student addresses the benefits of CBSA's bookkeeping services	<input type="checkbox"/>	<input type="checkbox"/>	<p>The student:</p> <ul style="list-style-type: none"> an outline of the features and benefits of the CBSA bookkeeping service.
7. The student identifies 3 things they have learnt from the results of the survey about past marketing performance	<input type="checkbox"/>	<input type="checkbox"/>	<p>The student:</p> <ul style="list-style-type: none"> Reviews the marketing plan and identifies 3 things they have learnt from the survey <p>For example:</p> <ul style="list-style-type: none"> Email marketing has been one of the best ways people have heard from People have chosen CBSA because of customer service People use CBSA for taxation, Bookkeeping, Business Planning and Advice
8. The student has reviewed the marketing plan and identified customers digital footprint and their engagement through CBSA	<input type="checkbox"/>	<input type="checkbox"/>	<p>The student:</p> <ul style="list-style-type: none"> The student has demonstrated they have reviewed the survey results and provided feedback on customer engagement through digital media <p>For example:</p> <ul style="list-style-type: none"> When asking how did you hear about CBSA, the top 3 digital tools used to get customers to hear about CBSA is Email, Google Advert and Facebook. When asked customers how they have sourced information to make decisions the top 3 digital tools used are Google Search, Email, Video/ Youtube What devices they use to source information: Smart Phone, Computer, Tablet/ iPad
9. The student has explained the two new clients that CBSA are representing from the Marketing Plan	<input type="checkbox"/>	<input type="checkbox"/>	<p>The student:</p> <ul style="list-style-type: none"> Explains and gives an overview of the two new clients which are KidsFedora Cotoure and Home Tech Solutions
10. The student has reviewed the CBSA Survey Results that are included in	<input type="checkbox"/>	<input type="checkbox"/>	<p>The student:</p>

<p>the Marketing Plan and identify 3 potential areas of improvement that you want the interns in their work to begin amending</p>			<ul style="list-style-type: none"> • The student has demonstrated they have reviewed the CBSA survey results and have identified 3 potential areas of improvement. <p>For example:</p> <ul style="list-style-type: none"> • Looking at our marketing costs vs engagement to see whether we need to look at other avenues of marketing and getting money worth • Looking at endorsing and marketing the products out there so customers are aware of all of the services CBSA offers (they might have come in for one product not knowing what CBSA offers) • Looking at the results from the survey around products/ services they would like to see offered seeing if we offer something already we need to market better or look at the cost of producing these services/ products.
<p>11. The student has demonstrated that they have gathered information through active listening and questioning with the students.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<p>The student:</p> <p>Use questioning and active listening (such as head nodding and paraphrasing to check for understanding) to gather information on marketing interns' interests.</p>

Case Study 3 - Evaluate Reasons for Existing Level of Consumer Interest

To begin this task please read the following email and its attachment, then complete the tasks that are associated with this case study.

	<table border="1"> <tr> <td>To</td> <td>Tina Hughes [tina.hughes@cbsa.com.au]</td> </tr> <tr> <td>From</td> <td>Gavin Stead [gavin.stead@cbsa.com.au]</td> </tr> <tr> <td>Date/ Time</td> <td>Monday 9.30 a.m.</td> </tr> <tr> <td>Subject</td> <td>Results of Research on Client Interest</td> </tr> <tr> <td>Attachment</td> <td>Client Survey Results.docx</td> </tr> </table>	To	Tina Hughes [tina.hughes@cbsa.com.au]	From	Gavin Stead [gavin.stead@cbsa.com.au]	Date/ Time	Monday 9.30 a.m.	Subject	Results of Research on Client Interest	Attachment	Client Survey Results.docx
To	Tina Hughes [tina.hughes@cbsa.com.au]										
From	Gavin Stead [gavin.stead@cbsa.com.au]										
Date/ Time	Monday 9.30 a.m.										
Subject	Results of Research on Client Interest										
Attachment	Client Survey Results.docx										
<p>Good morning Tina,</p> <p>Amazing work on the presentation that you created for the interns. They provided feedback on how they got a lot out of it.</p> <p>Next, can you review the marketing plan and outcomes from the survey we conducted and provide me with a report on what the survey reveals:</p> <ul style="list-style-type: none"> ▪ existing client interest and need for CBSA services ▪ client responses to previous marketing communications ▪ the influence and impact of individual and business challenges on client behaviour ▪ our clients' use of digital platforms and their communication expectations ▪ the effectiveness of CBSA's current positioning, the focus of appeal and marketing channels. <p>Please find the results of the research attached.</p> <p>Kind Regards,</p>											
<p>Gavin Stead Managing Director 300 Fictional Way, Sydney, NSW 2000 Phone: 1800 111 222 www.cbsa.com.au</p>											

Task 3: Responding to Objectives

Based on the email, analyse the survey results and respond to the following objectives. Each of your responses should be approximately 50 to 100 words in length.

You should use Microsoft Word or a similar program to present your answers.

Ensure you correctly identify each response.

Approximate Word Count: 5-50 words

Assessor Instructions

Purpose of the Task

The purpose of this task is to determine the students' competence in reviewing relevant data to assess the reasons for consumer interest and the effectiveness of past marketing strategies and focus of the appeal.

Reassessment Arrangements

If students do not respond to each point satisfactorily, they may resubmit those responses. Provide guidance to the student on what they have to address and date for resubmission.

Guidance to Assessors About This Task

Students should respond with short answers of 50 to 100 words in length. They should

- 1. Investigate client interest and need for the services by referring to the most popular services identified in "What CBSA services have you used?"*
- 2. Identify what digital platforms worked best and what was least successful by referring to "Where did you hear about CBSA?" and comparing the results to the advertising and sales strategy on page 8 of the CBSA Business Plan. At a minimum they should identify:*
 - Email is most successful but has a small budget*
 - There has been no focus on generating referral, but it is highly successful*
 - Radio, TV and newspaper are least effective but represent the biggest slice of the budget*
- 3. Explain the influences on consumer behaviour by referring to the research on "What are the biggest challenge facing you and your business?" At a minimum, they should identify the top 4 to 5 challenges as key influences on purchasing behaviour and explain what they mean. They may also identify the influence of referrals from colleagues from the previous objective.*
- 4. Review the data to describe the clients' favourite apps (not events or referral), namely:*
 - Google*
 - Email*
 - YouTube*
 - Facebook*
 - LinkedIn*
 - Mobile text/SMS services*
 - Website blogs/podcasts*

Students should also explain how the data in Part B indicates the clients' digital footprint and engagement, e.g. followers on Facebook and open rates of email communications etc.
- 5. Explain the clients' engagement journey by describing how clients were initially engaged and how they continue to be engaged, e.g. email, Facebook and LinkedIn*
- 6. Evaluate the effectiveness of the current focus of appeal by:*
 - identifying the existing appeal as "your business expert"*
 - evaluating this appeal against the responses to "Why did you choose CBSA" and decide whether this appeal was effective.*

Task 3A

Objective 1: Investigate consumer interests and need for CBSA services.

- Taxation
- Bookkeeping

Objective 2: Identify what digital platforms worked best and those that worked not so well for CBSA compared with CBSA's Advertising and Sales Strategy.

- Email is most successful but has a small budget
- There has been no focus on generating referral, but it is highly successful
- Radio, TV and newspaper are least effective but represent the biggest slice of the budget

Objective 3: Explain what the research reveals about the influences on consumer behaviour.

- they should identify the top 4 to 5 challenges as key influences on purchasing behaviour and explain what they mean. They may also identify the influence of referrals from colleagues from the previous objective.

Objective 4: Identify the digital technologies CBSA's clients use and determine CBSA's consumers' digital footprint.

- Google
- Email
- YouTube
- Facebook
- LinkedIn
- Mobile text/SMS services
- Website blogs/podcasts

Students should also explain how the data indicates the clients' digital footprint and engagement, e.g. followers on Facebook and open rates of email communications etc.

Objective 5: Explain what the research tells us about the consumers' engagement journey and how they prefer to be engaged/communicated with

- Explain the clients' engagement journey by describing how clients were initially engaged and how they continue to be engaged, e.g. email, Facebook and LinkedIn

Objective 6: Evaluate the effectiveness of CBSA's

a) current marketing focus

- identifying the existing appeal as "your business expert"

b) marketing channels/digital platforms

- evaluating this appeal against the responses to "Why did you choose CBSA" and decide whether this appeal was effective.

Task 3B

Next, let us review the new clients, and see what they are currently doing with their marketing and bookkeeping and analysing consumer types and why these companies are attracting their consumers.

Client Name	
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Current Marketing Strategy	
Current Bookkeeping Strategy	
Consumer Types-point of difference	

Approximate Word Count: 50-100 word in each section.

Assessor Instructions

Purpose of the Task

The purpose of this task is to determine the students' competence in reviewing relevant data to assess the reasons for consumer interest and the effectiveness of past marketing strategies and focus of the appeal for the new companies that CBSA are representing. As well looking at the current digital marketing environment and how they are connecting with the consumers and engaging in conversation and interventions with their clients.

Guidance to Assessors About This Task

- *Students are to review the CBSA Marketing Plan and provide details about KidsFedora Couture and Home Tech Solutions in the tables below. Answers have been provided for assessor guidance.*

Client Name	KidsFedora Couture
Current Marketing Strategy	<p>Social Media Strategy and Management: Leveraging our client's influencer status, we will curate engaging content and manage their social media accounts to expand their reach and engage with their audience effectively.</p> <p>Email Marketing Campaigns: Developing and executing email campaigns to nurture leads, promote new collections, and boost sales.</p> <p>Influencer Collaborations: Identifying and partnering with other influencers and kid-centric brands to expand brand awareness.</p>
Current Bookkeeping Strategy	<p>Current Bookkeeping setup: Currently they are doing their own bookkeeping using an online software MYOB. None of the workers have accounting experience and when it was a start up this suited them, but as the company is growing and sales are at an all time high this is becoming more difficult and there is a fear of compliance and tax compliance.</p>
Consumer Types-point of difference	<p>Kid-Friendly Fedora Hats: Our signature product, these fedora hats are meticulously designed to fit and complement kids' style and personality. Available in a variety of colors, patterns, and materials, each hat is crafted with comfort and fashion in mind.</p> <p>Exclusive Collections: KidFedora Couture releases seasonal collections inspired by the latest fashion trends. From playful summer hats to cozy winter fedoras, we've got the perfect headwear for every occasion.</p> <p>Customization: We offer customization options, allowing parents and kids to add a personal touch to their fedora hats with monograms, patches, and more.</p>
How are they engaging with clients in the digital marketing environment and connecting with the	<ul style="list-style-type: none"> • Using social media to engage with their customers through likes, comments and queries. • Using email to communicate with clients, and engage with them through email correspondances. • Using social media influences to create content and leveraging on it to engage with potential new customers and queries.

consumers engaging in conversation and interventions with their clients.	
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Client Name	Home Tech Solutions
Current Marketing Strategy	HomeTech Solutions recognizes the importance of effective marketing and precise bookkeeping in managing their business operations.
Current Bookkeeping Strategy	Current Bookkeeping setup: Currently the company has a small accounting firm that has been catering to their accounting needs. For a while now they have been unhappy with their service and feel that their accounting might not be up to scratch, up to date.
Consumer Types- point of difference	On-Site Repairs: HomeTech Solutions brings the repair shop to your home or office. Our skilled technicians are equipped to diagnose and fix a variety of electronic issues, from computer crashes to smartphone screen replacements. Custom-Built PCs: We offer customized computer systems tailored to your specific needs, whether it's for gaming, work, or general use. Our experts work closely with clients to build high-performance PCs that meet their requirements. Device Optimization: Our team provides comprehensive device optimization services, enhancing the speed and efficiency of computers, laptops, and mobile devices.
How are they engaging with clients in the digital marketing environment and connecting with the consumers engaging in conversation and interventions with their clients.	Currently no major digital correspondances identified. The company has not leveraged online marketing and engaging in conversation with their customers online. Customer engagement is mostly face to face.

Task 3C

Consumers are no longer passive recipients of marketing messages but active participants in the marketing process. Based off this, in the table below, identify ways that customers help drive digital marketing and engagement.

Provided in the table below are three (3) digital marketing platforms CBSA uses to help promote and drive products and services. Identify 2 examples for each strategy on how consumers help drive the digital marketing.

Digital Marketing Platforms	Consumer engagement- strategies on how they drive the digital marketing
Social Media	<ul style="list-style-type: none"> • Liking posts • Sharing posts on their pages • Sharing posts with friends • Sending posts on messenger to people • Doing reviews and product endorsement on pages, stories • Making free marketing posts and shareable content to audiences • Connecting with likeminded people and engaging in conversation

	<ul style="list-style-type: none"> • Sharing latest marketing and promotions in real time
Email	<ul style="list-style-type: none"> • Signing up to email advertisements and promotions • Sending content to people via email • Sharing products and promotions onto their social media platforms • Clicking and accessing products and services without having to research or find them • Sharing interactive content • Sharing targeted content
Website Engagement	<ul style="list-style-type: none"> • Signing up to promotional content, emails etc • Signing up to other forms of marketing and promotional materials like via text, social media • Conducting in research on products and services- looking at reviews etc and sharing this word of mouth • Sharing research products and services to social media platforms • Engaging on the website to help with website promotion and google analytics • Creating marketing promotions and free marketing campaigns to be shared on various platforms like pages, blogs and stories etc

Assessment checklist:

Students must have completed all questions within this assessment before submitting. This includes:

Case Study 1 - Intern Briefing		
Task 1	Task 1A- Complete Product/Service Features template and respond to questions a and b	<input type="checkbox"/>
	Task 1B- Respond to questions a, b and c.	<input type="checkbox"/>
	Task 1C- Respond to questions a-g	<input type="checkbox"/>
Case Study 2- Presentation to Interns (Role Play)		
Task 2	Create presentation and present during role play	<input type="checkbox"/>
Case Study 3 - Responding to Objectives		
Task 3	Task 3A – Respond to objectives (1-6)	<input type="checkbox"/>
	Task 3B – Complete tables with responses	<input type="checkbox"/>
	Task 3C – Complete table with responses	<input type="checkbox"/>



Congratulations you have reached the end of Assessment 2!

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