



ASSESSOR GUIDE

BSBMKG433

Undertake marketing activities

Assessment 2 of 4

Project



Assessment Instructions

Assessment overview

This assessment consists of one (1) Task.

- **Task 1:** Prepare to undertake a marketing activity

In this task, you will review existing CBSA's marketing activities and identify future activities.

Additional resources and supporting documents

To complete this assessment, you will need to access the following documents:

- **BSBMKG433_02_Business and Marketing Plan** [attached]
- **BSBMKG433_02_Privacy Policy & Procedures** [attached]
- **BSBMKG433_02_CBSA Marketing Activity Budget Versus Actual** [spreadsheet attached]
- **BSBMKG433_02_Marketing Review and Activity Template** [attached].



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.



Please consider the environment before printing this assessment.

TASK 1: Prepare to undertake marketing activity

To begin this task, read the following scenario and email. Complete the instructions that follow.

Scenario

Complete Business Solutions Australia (CBSA) originated in 1998 with five principals dedicated to integrity and excellence in economic and financial consulting.

Tina has been recently appointed the role of Sales and Marketing Manager. Her role allows her to work across teams from other areas of the business that can contribute and add input to marketing activities.

Tina reports to Gavin Stead, who is the Managing Director at CBSA. Gavin has informed Tina that he will shortly email instructions for her very first task in her role that contributes to the ongoing operations and strategic marketing goals,

Email

To: Tina Hughes (tina.hughes@cbsa.com.au)

From: Gavin Stead (gavin.stead@cbsa.com.au)

Date/time: Monday 1:01pm

Subject: Marketing Activities Review

Good afternoon, Tina,

I would like you to complete a review of our marketing activities in preparation for planning next year's marketing activities with the consideration of CBSA's Privacy Policies and Procedures.

Please review the following documents:

- **BSBMKG433_02_Privacy Policy & Procedures** [attached]
- **BSBMKG433_02_Business and Marketing Plan** [attached]
- **BSBMKG433_02_CBSA Marketing Activity Budget Versus Actual** [spreadsheet attached]

Your review should include:

- Summarising the financial activities undertaken under each of the headings outlined in the **BSBMKG433_02_CBSA Marketing Activity Budget Versus Actual**.
- Providing your viewpoint as to the most successful marketing activities. Please explain your reasons for your choice.
- Summarising CBSA competitor activity and trends within the financial services industry. The latter will require you to undertake external research.
- A recommendation as to three areas [consistent with the major headings contained in the **BSBMKG433_02_CBSA Marketing Activity Budget Versus Actual** document] that CBSA should focus on this year. For each activity
 - o Summarise marketing activities to be undertaken
 - o List at least three actions to be undertaken as part of the activity
 - o Identify financial and other resources required to pursue the activity

Please document your evaluation using the following document:

- **BSBMKG433_02_Marketing Review and Activity Template** [attached]

Kind Regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



For this task, you will assume the role of Tina Hughes and follow the instructions given to you by Gavin Stead.

Complete the CBSA **BSBMKG433_02_Marketing Review and Activity Template** addressing each of the points outlined below. You must communicate each point using a suitable grammatical structure and clear, logical language.

Your template must include:

1.1 An analysis of the business and marketing plan to:

- a) Identify two [2] elements in the plan that are business-related, two [2] that are marketing-related, and two [2] that relate to both.
- b) Currently the plan only contains business objectives, but it is missing marketing-related objectives. Based on the existing business and marketing plan, list two [2] potential marketing objectives.
- c) List one [1] relevant marketing element for CBSA that was either not contained or slightly contained in the plan and why you are listing them. [20-50 words]. Assume they were executed but were not listed in the plan.
- d) Identify two [2] marketing activities in the **BSBMKG433_02_Business and Marketing Plan that will** require the use of the **BSBMKG433_02_Privacy Policy & Procedures** and briefly explain how it will be used. [10-20 words for each]

1.2 A summary of the activities, expense, and income budget versus actual and return on investment under each of the major headings outlined in the **Marketing Activity Budget Versus Actual**, spreadsheet i.e.

- Google Ads
- Media
- Social media
- Special events
- Seasonal events.

[20-120 words for each].

Also, consider the mediums set in BSBMKG433_02_Business and Marketing Plan.


Your summary must include analysis as to:

- a) reasons for over/under-performance as outlined in notes
- b) whether return warranted the investment in your opinion
- c) alignment between plan and results.

1.3 A description of what you consider to be the three [3] most successful activities. Please include a justification for your selection. [20-40 words for each].

1.4 A description of two [2] marketing and promotional trends within the broader financial services industry. This will require you to undertake external/online research. [5-20 words for each]

- 1.5 A summary of three (3) of CBSA's competitor activity based on the notes in the **BSBMKG433_02_CBSA Marketing Activity Budget Versus Actual** spreadsheet. Include reference to industry trends as outlined in point 1.4. and compare with CBSA's marketing activities. [35-45 words for each]
- 1.6 A review of the budget outlined in the Business and Marketing Plan, then make three (3) recommendations for marketing investment based on the return on investment (ROI) reported. For each recommendation include:
- A summary of the marketing activities to be undertaken [5-25 words]
 - At least three specific actions to be taken as part of each activity
 - Any financial changes you would recommend and other (e.g. physical or human) resources required to undertake the activity and justify why. [70-100]
- 1.7 Using the following email template, write a short email [90-110 words].
- Advise in the email that the **BSBMKG433_02_Marketing Review and Activity Template** is attached, and you are requesting approval to pursue the marketing activities. Be sure to use correct spelling, language, and terminology.
- Submit the email and the completed **BSBMKG433_02_Marketing Review and Activity Template** to your assessor.

Email	
To:	
From:	
Date/time:	XXX
Subject:	
<p><i>[Insert your position title here]</i></p> <p>300 Fictional Way, Sydney, NSW 2000</p> <p>Phone: 1800 111 222</p> <p>www.cbsa.com.au</p>	
	

Assessor instructions:

Purpose of the Task

- Identify task requirements according to the organisation's business and marketing plan (**BSBMKG433_02_Business and Marketing Plan**) and relevant CBSA documents, policies, and procedures (**BSBMKG433_02_Marketing and Advertising Policy & Procedures, BSBMKG433_02_Privacy Policy & Procedures.**)
- Review marketing activities according to industry trends and competitive activity
- Develop and document action plan for marketing activities according to task requirements
- Seek approval of action plans from relevant personnel

- Identify and access resources required for marketing activities according to an action plan

Guidance to Assessors About this Task

Students must complete and submit the CBSA **BSBMKG433_02_Marketing Review and Activity** template provided.

Refer to the assessor exemplar.

Students' answers may vary. However, the responses must use suitable grammatical structure and clear, logical language and must address the following:

1.1 Business and Marketing Plan Analysis

- Identify two [2] elements in the plan that are business-related, two [2] that are marketing-related, and two [2] that relate to both.

Sample responses below:

	Business Related	Marketing Related	Related to both
1	<i>Business Details</i>	<i>Target Audience</i>	<i>Products/Services</i>
2	<i>Business Goals</i>	<i>Advertising</i>	<i>Income</i>
	<i>Organisation Chart</i>	<i>Sales</i>	<i>Communication Channels</i>
	<i>CBSA Board</i>	<i>Sales and Distribution Channels</i>	<i>Payment types accepted</i>
	<i>Finance</i>		
	<i>Operations</i>		
	<i>Plant and Equipment</i>		
	<i>Technology (Software)</i>		

- Currently the plan only contains business objectives, but it is missing marketing-related objectives. Based on the existing business and marketing plan, list two [2] potential marketing objectives.

Sample responses of marketing objectives are listed below:

- Increase sales in IT Services by X%*
- Increase sales in Financial Services by X%*
- Increase sales Business Services by X%*
- Increase sales in HR Services by X%*
- Redesign website to increase lead generation*
- Launch paid campaigns using display advertising and social media*
- Advertise in traditional media (Newspaper, Radio and Television)*
- Select an industry event to sponsor and maximise*
- Run two seasonal events per year*

- Increase sales via electronic channel by X%
- Increase sales via direct contact by X%
- Increase sales via shopfront by X%

c) List one [1] relevant marketing element for CBSA that was either not contained or slightly contained in the plan and why you are listing them. Assume they were executed but they were not listed in the plan.

Sample responses below:

- **CRM:** salesforce is used, and email marketing is mentioned but there are no specifics about how the CRM is used in reference to the website, how the salespeople are using it.
- **Prospective customer journey** given there are different sales and distribution channels, the target audience stage journey needs to be defined for each channel as they behave differently.
- **Target audience:** it was defined as small, medium, and enterprise size organisations, but no demographic or psychographic information was provided regarding segments targeted.

Other responses may also include- point of sale marketing, branding, lead conversion, marketing results tracking, sales performance, cross-selling, upselling, and new vs returning customers.

d) List two [2] marketing activities in the **BSBMKG433_02_Business and Marketing Plan** that will require the use of the **BSBMKG433_02_Privacy Policy & Procedures** and briefly explain how it will be used. [10-20 words for each]

Sample responses below:

- Google Ads: a **privacy policy** needs to be provided
- Email newsletter: all emails need to have a link to the **privacy policy** and to the unsubscribe
- Social media (Facebook, Twitter, Instagram, LinkedIn) all channels need to have a link to the **privacy policy**
- Events: if at any event we are collecting data, we need to make the **privacy policy** available.

1.2 A summary of the activities, expense, and income budget versus actual and return on investment under each of the major headings outlined in the **BSBMKG433_02_CBSA Marketing Activity Budget Versus Actual** spreadsheet. See Assessor exemplar. Also, consider the mediums set in **BSBMKG433_02_Business and Marketing Plan**. [20-120 words for each]

This must include:

- reasons for over / under performance as outlined in notes
- whether return warranted the investment
- alignment between plan and results

Sample responses below:

	Summary [20-120 words for each]
Google Ads	<i>Expenditure for Google Ads came in on budget (\$2500) and the income generated was up by \$8,500 pushing the return on investment to 880%.</i>

<p>Media</p>	<p><i>Expenditure on traditional media almost on budget except for \$200 underspent in newspaper against a \$6,200 budget.</i></p> <p><i>The three mediums invested on are newspaper radio and Television, with latter being the largest marketing investment across all activities.</i></p> <p><i>Only radio provided a larger income than originally budgeted with a 112% ROI.</i></p> <p><i>Both newspaper and television provided an ROI, however the actual income generated was less than originally budgeted.</i></p> <p><i>The business and marketing plan had Television as the medium with the highest responsibility when it comes increasing sales by 20% previous year sales are yet to be available to confirm of objective was met.</i></p> <p><i>TV as a medium brought in the second largest amount of income with 20% of the total.</i></p>
<p>Social media</p>	<p><i>According to the business and marketing plan, social media activities had organisation profile raising as objective, It however generated 410,000 in income and exceeded the budget by \$2,000 from originally \$8,000 projected.</i></p> <p><i>Of all mediums, Facebook was the only one providing a negative ROI as only \$500 were generated from a \$600 investment.</i></p> <p><i>LinkedIn investment was more than double the original budget as ROI was the second highest after website providing a 650% ROI</i></p> <p><i>All social media channels but LinkedIn performed lowered than budgeted.</i></p>
<p>Special events</p>	<p><i>Sponsorships and public events had a 384% and 294% ROI respectively.</i></p> <p><i>Special events were responsible for 15% of the total sales and out of the option activities, sponsorship exceeded the income budget by \$28,750</i></p> <p><i>The special events business objective was to raise the organisation profile and in fact the sponsorship had significant media attention.</i></p> <p><i>Bad weather had an effect on the public events resulting on the actual income being only 75% of what originally was budgeted.</i></p>
<p>Seasonal events</p>	<p><i>The sales campaigns did not meet the income budget projected. They however had a 254% and 203% ROI respectively.</i></p> <p><i>Both had an objective to increase sales by 30%, there is no sufficient data to determine if this goal was met. The expenditure for both sales campaigns matched the budget.</i></p>

1.3 Describe what they consider to be the three [3] most successful activities and justify their selection?

[20-40 words for each].

Responses may vary according to interpretation and justification; however successful activities would typically include:

- Google Ads
- LinkedIn
- Special Events

Facebook and traditional media could not be considered successful.

Sample responses below:

1.	<i>The Google ads investment was most successful, the expenditure was exactly as planned, and the income generated was significantly higher.</i>
2.	<i>Social media, although mixed, was particularly successful with LinkedIn. This aligns with the strong presence of financial services industry professionals on this platform.</i>
3.	<i>Special event advertising is considered the third most successful investment given the return-on-investment rates. Although public events performed below expectation, the return on investment was still higher than other categories. Sponsorship generated significant ROI at 384%</i>

1.4 Describe two [2] marketing and promotional trends within the financial services industry. [5-20 words for each]

Responses will vary but may include:

- *Need for increasingly personalised service and advice that is tailored to their specific industry and situation.*
- *Machine learning and automated marketing solution, i.e., Pushing content based on interaction with the website and social media*
- *Mobile on-demand access and services*
- *Chatbots have become increasingly popular because they provide instant service.*
- *Personalisation of service, e.g., Dedicated managers and interfaces designed specifically for customer needs.*

1.5 Summarise three [3] of CBSA's competitor activity based on the notes in the **BSBMKG433_02_CBSA Marketing Activity Budget Versus Actual** spreadsheet. Include reference to industry trends as outlined in point 1.4. and compare with CBSA's marketing activities. [35-45 words for each]

Responses must include:

- *Three competitors as outlined on the **BSBMKG433_02_CBSA Marketing Activity Budget Versus Actual** spreadsheet.*
- *Reference to the information contained in the **BSBMKG433_02_CBSA Marketing Activity Budget Versus Actual** spreadsheet*
- *Reference to marketing trends outlined in the above point.*

Sample responses below:

ABC Financial Services (35-45 words)	<i>LinkedIn outreach campaign appears to have been successful given recruiting activity and move to new offices. Outreach programs can include tailoring personalised approaches and content to meet specific customer demands. This appears to have worked well for ABC.</i>
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J&A Accounting and Auditing (35-45 words)	<i>The use of television and radio suggests J&A is an older-style company with an established, traditional customer base. Although their scaling back may be said to be focusing on the existing customer base, this may not be viable in the longer term.</i>
Lanterra Co. (35-45 words)	<i>Lanterra by focusing on specific customer groups is responding to the trend for personalised service and industry specificity. The use of social media and websites that align with the young, creative industries that they are targeting.</i>

1.6 Review the budget outlined in the Business and Marketing Plan, then make three [3] recommendations for marketing investment based on the return on investment [ROI] reported. For each recommendation include:

- a) A summary of the marketing activities to be undertaken [5-25 words]
- b) Three [3] specific actions to be taken as part of each activity
- c) Financial and other [e.g., physical or human] resources required to undertake the activity and justify why. [70-100 words]

Responses may vary. Sample responses below:

Recommendation #1
Marketing activities to be undertaken [5-25 words]
<i>LinkedIn outreach, i.e., Targeting people within specific industries or roles and approaching them with bespoke or tailored offerings.</i>
Actions as part of marketing activities
<i>1. Identify market segment to pursue</i>
<i>2. Create LinkedIn content/initial approach content for specific segments identified</i>
<i>3. Undertake outreach via paid promotion and LinkedIn content</i>
Financial and other resources that are required and justify why. [70-100 words]
<i>\$5,000.00 LinkedIn advertising spend due to the website being the top two [2] mediums in terms of ROI. Also, from a total budget of \$138,130.00 this increase in the budget can be offset by a less than 10% reduction in the Television budget.</i>
<i>LinkedIn content, as new refreshing content needs to be created in the new year.</i>
<i>CBSA personnel to be the initial point of contact for responses received via LinkedIn to ensure leads are converted.</i>

Recommendation #2
Marketing activities to be undertaken [5-25 words]
<i>Continued sponsorship of Financial Services Awards Dinner. This could be worked in conjunction with LinkedIn Outreach, i.e., LinkedIn content could show Awards Dinner and CBSA presence.</i>
Actions as part of marketing activities

1. <i>Secure sponsorship of this year's event</i>
2. <i>Plan marketing collateral to be created to showcase the promotion of the event</i>
3. <i>Engage a photographer to cover the event</i>
Financial and other resources that are required and justify why. (70-100 words)
<i>Sponsorship \$8,000.00 Newspaper ads to appear at the same time of the dinner to leverage potential media exposure. CBSA marketing team to prepare marketing materials</i>

Recommendation #3
Marketing activities to be undertaken [5-25 words]
<i>The inclusion of Google Ads as a marketing activity.</i>
Actions as part of marketing activities
1. <i>Development of new/seasonal banner advertisements</i>
2. <i>Testing of placement of banner advertisements and analysis of results</i>
3. <i>Roll out of ads identified as high performing</i>
Financial and other resources that are required and justify why. (70-100 words)
<i>\$5,000.00 advertising budget based on the high ROI and opportunity to offset increase based on a reduction of the TV budget</i>

1.7 Write an email to Gavin Stead that must include the following: (90-110 words)

- Advising that the Marketing Review and Activity report is attached.
- Requesting approval to proceed with plan.
- Using correct spelling, language, and terminology.

Sample response below:

Email	
To:	<i>Gavin Stead[gavin.stead@cbsa.com.au]</i>
From:	<i>Tina Hughes[tina.hughes@cbsa.com.au]</i>
Date/time:	<i>XXX</i>
Subject:	<i>RE: Marketing Activities Review</i>
<i>Good morning, Gavin,</i>	

As requested, in preparation for planning next year's marketing activities I have completed a review of our past marketing.

Considering our Business and Marketing Plan along with our budget, I have outlined what has been most successful for us regarding ROI and made suggestions for future investments, considering industry trends and competitor activity.

Once you have had the time to look over the report attached, I would appreciate your feedback and approval for actioning the activities recommended.

Please don't hesitate to reach out if you have any questions.

I look forward to gaining your approval.

Tina Hughes

Sales and Marketing Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



Reassessment Arrangements

If the student submits incomplete documentation or documents that do not have the correct information, they will need to be given feedback about their work and an appropriate time in which to resubmit. Students should only redo parts of the documentation that are incorrect.

Discuss timeframes for resubmission with the student when you tell them about the outcome of this task.

Assessment checklist:

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

Did the student:		
1.1	Analyse the Business and Marketing Plan and identify: a) <input type="checkbox"/> two [2] elements in the plan that are business-related, <input type="checkbox"/> two [2] that are marketing-related, and <input type="checkbox"/> two [2] that relate to both? b) <input type="checkbox"/> two [2] potential marketing objectives? c) <input type="checkbox"/> one [1] marketing element and explain why they are listing it? d) <input type="checkbox"/> List two [2] marketing activities in the BSBMKG433_02_Business and Marketing Plan that will require the use of the BSBMKG433_02_Privacy Policy & Procedures and how it will be used?	<input type="checkbox"/>
1.2	Summarise the activities, expense, and income budget versus actual and return on investment under each of the major headings outlined in the BSBMKG433_02_CBSA Marketing Activity Budget Versus Actual spreadsheet. See Assessor exemplar. This must include: <input type="checkbox"/> reasons for over / under performance as outlined in notes <input type="checkbox"/> whether return warranted the investment <input type="checkbox"/> alignment between plan and results.	<input type="checkbox"/>
1.3	Describe what they consider to be the three [3] most successful activities and justify their selection?	<input type="checkbox"/>
1.4	Describe two [2] marketing and promotional trends within the financial services industry?	<input type="checkbox"/>
1.5	Did the student review CBSA competitor activity as outlined on the BSBMKG433_02_CBSA Marketing Activity Budget Versus Actual spreadsheet. This must include: <input type="checkbox"/> Three competitors as outlined on the BSBMKG433_02_CBSA Marketing Activity Budget Versus Actual spreadsheet <input type="checkbox"/> Reference to information contained in the BSBMKG433_02_CBSA Marketing Activity Budget Versus Actual spreadsheet	<input type="checkbox"/>

	<input type="checkbox"/> <i>Reference to marketing trends outlined in above point.</i>	
1.6	<p>Recommend three (3) areas that CBSA should focus on in the coming year. For each activity include:</p> <ul style="list-style-type: none"> <input type="checkbox"/> <i>A summary of the marketing activities to be undertaken</i> <input type="checkbox"/> <i>At least three specific actions to be taken as part of each activity</i> <input type="checkbox"/> <i>Financial and other (e.g., Physical or human) resources are required to undertake the activity. For this section, there are no specific financial requirements, however, the student will need to work within budget and justify the financials required.</i> 	<input type="checkbox"/>
1.7	<p>Write an email to Gavin Stead? This must include:</p> <ul style="list-style-type: none"> <input type="checkbox"/> <i>Advising that the report is attached.</i> <input type="checkbox"/> <i>Requesting approval to proceed with plan.</i> <input type="checkbox"/> <i>Using correct spelling, language, and terminology.</i> 	<input type="checkbox"/>



Congratulations you have reached the end of Assessment 2!

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