



ASSESSOR GUIDE

BSBMKG433

Undertake marketing activities

Assessment 4 of 4

Case study



Assessment Instructions

Assessment overview

This assessment consists of two [2] tasks.

- **Task 1:** Review Sally's implementation of a task in sourcing external resources
In this task, you will review the implementation of Sally's actioning item/s and provide solutions to her concerning the issues with sourcing external resources [as per her email in **Task 3: Assessment BSBMKG433_03_Project Role play**].
- **Task 2:** Prepare to undertake marketing activity
In this task, you will follow a case study and complete a *Marketing Review*.

Additional resources and supporting documents

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

- **BSBMKG433_02_Project** submission
- **BSBMKG433_03_Project Role play** submission



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: Review task Implementation and provide solutions to problems

To begin this task, read the scenario and 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 to 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.

Tina has recently completed an actioning and mentoring plan, allocating tasks to appropriate personnel. One staff member, Sally Pierce, a personal assistant to Gavin, was appointed the task of acquiring external resources to help out with web design. However, she hasn't had any response since her request via email and has expressed concerns in her written approach.


As a part of monitoring the implementation of Sally's task, Tina has requested to review the email of the initial communication.

Tina has since received the forwarded email.

For this task, you will assume the role of Tina Hughes and follow the instructions below.

1.1 Using the following email template, insert the forwarded email that Sally Pierce has provided you.


Please note: This was provided by your Assessor with the feedback of your previously submitted assessment [**BSBMKG433_03_Project Role Play**] where they assumed the role of Sally Pierce.

Email	
To:	
From:	
Date/time:	XXX
Subject:	
<i>(Include original recipient's email address here)</i>	
<i>(Insert your position title here)</i>	
300 Fictional Way, Sydney, NSW 2000	
Phone: 1800 111 222	
www.cbsa.com.au	
	

1.2 Read the details of the forwarded email to identify the problem that may have caused Sally to receive no response. Briefly explain the issue in the space below: (10-20 words)

--

1.3 Using the email template below, respond to Sally explaining the error of what went wrong and what she needs to do to amend and implement the action for sourcing web designers. (80-100 words)

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

- Recognise a problem and provides solutions in familiar work contexts
- Monitor implementation of marketing activities according to activity plan, as required.

Guidance to Assessors About this Task

Students must complete the email templates provided and one [1] short answer in the space provided. Refer assessor exemplar.

1.1 Students' answers may vary. However, the responses must:

- *include the feedback provided by the Assessor who assumes the role of Sally Pierce*
- *include an incorrectly written email*

Email	
To:	<i>Tina Hughes [tina.hughes@cbsa.com.au]</i>
From:	<i>Sally Pierce [sally.pierce@cbsa.com.au]</i>
Date/time:	XXX

Subject:	<i>FWD: Requesting Web designers</i>
[include the created incorrect recipient's email address here) For example, mark@fiverr.con	
<p><i>Good afternoon, My name is Sally Pierce and work as a Personal Assistant at Complete Business Solutions Australia (CBSA). We are wanting to implement a Google ad marketing campaign and are seeking a team of web designers that would be available for a six-month period. If this is something you are able to assist us with, please advise at your nearest convenience so we can get together and organise the details. I am looking forward to your response. Sally Pierce</i></p>	
<p><i>Personal Assistant</i> 300 Fictional Way, Sydney, NSW 2000 Phone: 1800 111 222 www.cbsa.com.au</p>	



1.2 The students' response must include the incorrect email address. See exemplar below [10-20 words]

The email address was written incorrectly, the email was not received by the recipient. Because it had '.con' instead of .com'

1.3 Students' response may vary. However, the email must:

- *Inform Sally of the incorrect email address that was used*
- *Advise Sally of how to amend it so she can implement her allocated action.*

See exemplar below:

Email	
To:	<i>Sally Pierce (sally.pierce@cbsa.com.au)</i>
From:	<i>Tina Hughes (tina.hughes@cbsa.com.au)</i>
Date/time:	<i>XXX</i>
Subject:	<i>Feedback on task implementation</i>
<p><i>Good afternoon Sally, Thank you for forwarding the email of your initial communication. I have reviewed what you have written, and it was very well composed. However, I did notice you misspelled the email address which unfortunately means that the email was not received. As a matter of urgency, could you attempt to email with the following email address, [insert email address here] double-check it is accurate before you send it through.</i></p>	

*Please keep me informed of when they have replied and when we can progress with this task.
Kind regards,*

Tina Hughes

[Insert your position title here]

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



TASK 2: Review marketing activities

To begin this task, read the following case study and complete the instructions that follow.

Case study

It is now July, and the LinkedIn marketing strategy has just been completed by an outsourced agency. This has included:

- Developing LinkedIn content designed to market CBSA as a leading financial services provider.
- Identifying senior decision-makers [e.g. Chief Financial Officers, Financial Controllers, Chief Executives] at Sydney-based professional services organisations, e.g. Solicitors and Consultancies.
- Developing content to show that CBSA can help with financial compliance and planning activities.
- Using a combination of paid/sponsored LinkedIn posts and messaging directly to inboxes.

The company has reported the following performance against budget for the last 12 months:

Budgeted promotional spend: \$25,000.00

Actual promotional spent: \$23,000.00

Budgeted revenue: \$250,000.00

Actual revenue: \$325,000.00

Notes on performance:

LinkedIn posts written with the aim of being promoted [ie. Boosted posts] were very well received and shared amongst CBSA's employees and their networks. This ongoing contribution of operational and strategic marketing goals has resulted in the posts receiving a great deal of viral exposure [i.e.. Unpaid exposure] in addition to the paid exposure.

A number of high-value potential clients were reached using LinkedIn. The average value of these new clients is 33% higher than CBSA's typical client.

Although the original intent was to target professional services organisations, several enquiries were received from large educational institutions, highlighting a gap in the market for financial services tailored to the needs of schools. A number of these clients have been secured and the opportunity to expand in this area is currently being explored further.

Illness and annual leave impacted the CBSA team around Easter resulting in several staff members being away for many weeks at a time. As a result, the leads generated over that period of time have not been contacted in a timely manner.

Additionally, one of the ad sets was incorrectly set up and it meant all the budget for that set was used in 24 hours with no result being generated.

Some clients made contact via telephone. As our receptionist was not aware of the LinkedIn promotion, there was some delay in reaching the relevant staff members.

For this assessment, as with **BSBMKG433_02_Project** and **BSBMKG433_03_Project Role play** assessments, you will continue to assume the role of Tina Hughes and complete the following instructions.

You are to read and understand the above case study, and based on your understanding of this case study complete the following tasks using the **BSBMKG433_04_Marketing Review Template**:

This must include:

- 2.1 Calculating:
 - a) Actual versus budgeted marketing spend. Figure to be expressed in actual terms and as a percentage of the budgeted figure.
 - b) Actual versus budgeted revenue. Figure to be expressed in actual terms and as a percentage of the budgeted figure.
- 2.2 Summarising how the LinkedIn marketing activity outlined in the case study may have been impacted by the issues addressed in 'notes on performance'. Please include three [3] points that outline the following:
 - a) A summary of the issue and its impact
 - b) Impact on revenue and promotional budget
- 2.3 Identifying and recommending two [2] internal/procedural changes at CBSA relating to marketing activity implementation.
- 2.4 Identifying and recommending two [2] changes to be made to the plan prepared in **BSBMKG433_03_Project Role play** based on information provided in the case study.
- 2.5 Using the following email template, write a short email to Gavin [50-80 words].
Advise in the email that the **BSBMKG433_04_Marketing Review Template** is attached. Be sure to use correct spelling, language, and terminology.

Complete the following template with your written-up email and submit this document alongside the completed **BSBMKG433_04_Marketing Review Template**.

Email	
To:	
From:	
Date/time:	XXX
Subject:	

[Insert your position title here]

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



Assessor instructions:

Purpose of the Task

- Measure and record outcomes of marketing activities against marketing plan
- Review results of activities against expected marketing plan outcomes
- Prepare a report of marketing activities and share with relevant personnel
- Monitor marketing activities, and review and amend activity plan as required.

Guidance to Assessors About this Task

The student must complete the Marketing Review template using clear and concise language. The benchmarks answers must include the following:

2.1 Did the student evaluate financial performance?

This must include:

- Actual versus budgeted marketing spend to be expressed in actual terms and as a percentage of budget. This must include:
 - Actual spent \$23,000.00
 - Budgeted spend \$25,000.00
 - Actual spent: 92% of budget.
- Actual versus budgeted revenue to be expressed in actual terms and as a percentage of budget. This must include:
 - Actual revenue \$325,000.00
 - Budgeted revenue \$250,000.00
 - Actual revenue: 130% of budget

1.1 Budget Performance	
a. Actual versus budgeted marketing spend <i>[expressed as actual figure and percentage of budget]</i>	<i>Actual spent: \$23,000.00</i> <i>Budgeted spend: \$25,000.00</i> <i>Difference: \$2,000.00</i> <i>Actual spend was 92% of budget</i>
b. Actual versus budgeted revenue <i>[expressed as actual figure and percentage of budget]</i>	<i>Actual revenue: \$325,000.00</i> <i>Budgeted revenue: \$250,000.00</i> <i>Difference: \$75,000.00</i> <i>Actual revenue was 130% of budget</i>

2.2 Summarise how the LinkedIn marketing activity outlined in the case study may have been impacted by the issues addressed in notes on performance. This must include three (3) points that address the following:

- A summary of the issue and its impact
- Impact on revenue and promotional budget

Sample responses:

1.2 Summary of factors impacting performance
<i>(Must address revenue and budget)</i>
Impacting Factor #1
<i>LinkedIn posts received a greater volume of viral (ie. Unpaid) traffic. This resulted in a larger number of people (and potential clients) seeing the posts than originally planned. This may have positively impacted the revenue and helped to offset the fact one of the ad sets was incorrectly set up consuming all budget in that set with no results.</i>
Impacting Factor #2
<i>LinkedIn conversation ads may have had high engagement rates but that did not translate into higher number of leads, this means the actual revenue could have been potentially higher.</i>
Impacting Factor #3
<i>Illness and annual leave and the attendant procedural deficiencies meant that some of the leads generated were not contacted creating a not-so-good prospective client experience.</i>

2.3 Did the student identify and recommend two (2) internal/procedural changes at CBSA relating to marketing activity implementation?

This may include:

- *Put in place procedures to ensure ad set configurations are revised by a different team member to spot any issues.*
- *Create auto-replies for all leads generated and set up marketing automation.*
- *Ensure all staff members are aware of current promotional activities to ensure smooth receipt of enquiries.*

Sample Responses:

1.3 Internal/procedural changes to address underperformance
1. <i>Put in place procedures for ad setups are QA by a different team member to ensure budgets are set up ad per plan.</i>
2. <i>Set automated email responses for all leads generated and configure marketing automation campaigns.</i>

2.4 Did the student identify and recommend two (2) changes to be made for future marketing activities using LinkedIn?

This may include:

- *Try different content for conversation ads to see if they generate different results regarding leads.*
- *Emphasise and include more variations of LinkedIn videos ads in future campaigns,*

Sample Responses:

1.4 Changes to be made for future marketing activities that use LinkedIn
1. <i>Try different content for conversation ads to see if they generate different results regarding leads.</i>
2. <i>Emphasise and include more variations of LinkedIn videos ads in future campaigns.</i>

2.5 Did the student write an email to Gavin Stead?

This must include:

- *Use of correct spelling, grammar, and language.*
- *Advising that the review of the LinkedIn Promotion has been completed.*

Sample Response:

Email	
To:	Gavin Stead [gavin.stead@cbsa.com.au]
From:	Tina Hughes [tina.hughes@cbsa.com.au]
Date/time:	XXX
Subject:	RE: LinkedIn marketing opportunity - discussion
<p><i>Good morning, Gavin,</i></p> <p><i>I hope this email finds you well. After implementing the LinkedIn Promotion, I have completed the Marketing Review to evaluate its success against the expected marketing plan outcomes. Please review the completed document:</i></p> <ul style="list-style-type: none">▪ <i>BSBMKG433_04_Marketing Review Template</i> [attached]. <p><i>I am looking forward to hearing from you soon.</i></p> <p><i>Kind Regards,</i></p> <p><i>Tina Hughes</i></p>	
<p><i>Sales and Marketing Manager</i></p> <p>300 Fictional Way, Sydney, NSW 2000</p> <p>Phone: 1800 111 222</p> <p>www.cbsa.com.au</p>	



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 for this task

Assessment checklist:

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

Task 1		
Did the student:		
1.1	add the forwarded email from Sally Pierce into the template provided?	<input type="checkbox"/>
1.2	describe the identified issue within Sally's composed email?	<input type="checkbox"/>
1.3	respond to Sally Pierce via email? The email response must: <ul style="list-style-type: none"> <input type="checkbox"/> address the issue identified in the template provided <input type="checkbox"/> advise Sally on how to amend it so she can implement her allocated action. 	<input type="checkbox"/>
Task 2		
Did the student:		
	submit a completed Marketing Review using the template provided?	<input type="checkbox"/>
2.1	evaluate financial performance in the Marketing Review? This must include: <ul style="list-style-type: none"> <input type="checkbox"/> <i>Actual versus budgeted marketing spend to be expressed in actual terms and as a percentage of budget. Including:</i> <ul style="list-style-type: none"> <input type="checkbox"/> <i>Actual spent \$23,000.00</i> <input type="checkbox"/> <i>Budgeted spend \$25,000.00</i> <input type="checkbox"/> <i>Actual spent: 92% of budget.</i> <input type="checkbox"/> <i>Actual versus budgeted revenue to be expressed in actual terms and as a percentage of budget. Including:</i> <ul style="list-style-type: none"> <input type="checkbox"/> <i>Actual revenue \$325,000.00</i> <input type="checkbox"/> <i>Budgeted revenue \$250,000.00</i> <input type="checkbox"/> <i>Actual revenue: 130% of budget</i> 	<input type="checkbox"/>
2.2	summarise how the LinkedIn marketing activity outlined in the case study may have been impacted by the issues addressed in notes on performance? This must include three points each addressing: <ul style="list-style-type: none"> <input type="checkbox"/> <i>A summary of the issue and its impact</i> <input type="checkbox"/> <i>Impact on revenue and promotional budget</i> 	<input type="checkbox"/>
2.3	identify and recommend at least two [2] internal/procedural changes at CBSA relating to marketing activity implementation? This may include: <ul style="list-style-type: none"> <input type="checkbox"/> <i>Put in place procedures to ensure ad sets are correctly set up by having a quality assurance process in place where a second team-member revises the configuration of ads to confirm it is all created according to plan.</i> <input type="checkbox"/> <i>Set automated email responses to ensure all leads are communicated at least once.</i> <input type="checkbox"/> <i>Ensure all staff members are aware of current promotional activities to ensure smooth receipt of enquiries.</i> 	<input type="checkbox"/>
2.4	identify and recommend two [2] changes to be made for future marketing activities using LinkedIn? This may include: <ul style="list-style-type: none"> <input type="checkbox"/> <i>Try different content for conversation ads to see if they generate different results regarding leads.</i> <input type="checkbox"/> <i>Emphasise and include more variations of LinkedIn videos ads in future campaigns,</i> 	<input type="checkbox"/>
2.5	write an email to Gavin Stead? This must include: <ul style="list-style-type: none"> <input type="checkbox"/> <i>Use of correct spelling, grammar and language.</i> 	<input type="checkbox"/>

<input type="checkbox"/>	<i>Advising that the review of the LinkedIn Promotion has been completed.</i>	
<input type="checkbox"/>	<i>Advising that the BSBMKG433_04_Marketing Review Template is attached</i>	



Congratulations you have reached the end of Assessment 4!

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