

ASSESSMENT GUIDE FOR LEARNERS & LEARNER WORKBOOK

Marketing

Level 5

Copyright ©



P.O. Box 461, Hillcrest, 3650
(031) 313-3364

Title:		Integrate Marketing Plans with Business Process					
Applied Title:		Integrate Marketing Plans with Business Process in Citrus Production Enterprise					
Field:		Business, Commerce and Management Studies					
Sub-Field:		Marketing					
SETA (SGB):		Marketing					
Skills Area:		Marketing					
Context:		Citrus Production					
US No:	10050	Level:	5	Credits:	6	Notional Hours:	60
Author:		L. von Broembsen					

Based on the Production Guidelines of:



Supported by:



Unit standard alignment and assessment tool development:

Cabeton Training and Development

Project coordinator:

Jacomien de Klerk

Disclaimer

By accepting this document and reading its contents you agree to be bound by the terms of this disclaimer.

The use of the contents of this document is at your own risk. Neither the Citrus Academy nor the CRI or the CGA warrant that the content of this document is suitable for your intended use or that it is free of inaccuracies or omissions. The opinions and advice expressed in this document are not necessarily those of the Citrus Academy, the CRI or the CGA. The Citrus Academy, the CRI and the CGA, their directors, officers, employees, agents and contractors shall not be liable for any loss or damage of any nature suffered by any person as a direct or indirect result of the use of, or inability to use any advice, opinion or information contained in this document, or any misrepresentation, misstatement or omission, whether negligent or otherwise, contained in this document.

You indemnify the Citrus Academy, the CRI and the CGA against any claim by any third party against the Citrus Academy, the CRI or the CGA, their directors, officers, employees, agents or contractors arising from, or in connection with, the use of, or reliance on, the contents of this document. It is your responsibility to determine suitability of the contents of this document for your intended use.

Table of Contents

Directions 4

Step 1 5

Step 2 7

Step 3 8

Step 4 9

Step 5 11

Step 6 22

Step 7 24

Step 8 25

Step 9 26

Step 10 32



Directions

This material is aimed at learners wishing to complete this unit standard. The guide contains all necessary activities and instructions that will enable the assessor and learner to gather evidence of the learner's competence as required by the unit standard.

This guide is designed to be used by the learner with guidance from a facilitator and a trained assessor to develop competence in all knowledge, skills and attitudes required by this unit standard.

This guide contains step-by-step instructions for the assessment process. These steps are as follows:

Step	Description	Timeframe
1	Learner Assessment Contract	Before delivery of program
2	Learner Declaration of Authenticity	Before delivery of program
3	Learning Assumed to Be in Place	Before delivery of program
4	Learner Assessment Plan for Gathering of Evidence	Before delivery of program
5	Assessment Activity Workbook	During delivery of program, assessment after delivery of program
6	Road Show Multimedia Presentation	After delivery of program
7	Attitudes and Attributes Assessment	After delivery of program
8	Re-assessment Procedures	After completion of assessment
9	Documentation	After completion of assessment
10	Administration and Completion of Portfolio of Evidence	After completion of assessment

Step 1

Learner Assessment Contract

The assessor and / or the facilitator holds a pre-assessment briefing with you before the learning program starts in order to guide you and assist you to make sure that you understand exactly what is expected from you in order to become competent in this learning module.

As part of the pre-assessment briefing, the learner assessment contract must be signed. The assessor will assist you and explain the agreement to you in detail.

Learner Assessment Contract	
Learner's Name:	
Assessor's Name:	
Unit Standard:	10050
Your rights as a learner are: 1. You have a right to appeal against any judgment given as a result of any assessment. You must have valid reasons for doing this. 2. You have the right to an interpreter if you need one. However, if one of the learning assumptions for the unit standard is that you are competent within the language of assessment, you may not have an interpreter. 3. You can ask that an impartial observer attend any assessment. This observer may not take any part in the assessment. 4. If you do not agree with the assessment, you have the right to have your assessment internally moderated. If you still do not agree with the result of the assessment you can ask that the ETQA to perform an external moderation on the assessment. If any verification upholds the assessment findings, you will be held liable for all the costs of the verification. If any verification rules that you have been aggrieved as a result of the assessment, your assessor will be held liable for all cost of verification. 5. If during the assessment you are found not yet competent, your assessor will encourage you to master the areas where you have not reached competency. This will be recorded on a development plan. You are required to arrange with the assessor for a new assessment schedule. The assessor can only permit three such re-assessments. If a learner has not reached mastery after three additional attempts, the assessor reserves the right to remove you from the program.	
<u>Qualification</u> This standard leads to the award of credits for unit standard 10050. Once the assessment is complete application will be made to register and certify you for that standard with the AgriSETA. You may contact the assessor or facilitator at any time for information to assist you with further studies.	
<u>Confidentiality</u> Each assessment application, the outcomes, results and reviews will be treated as a confidential matter by you, the learner, the facilitator(s), assessor(s), and moderator(s). No references will be made to anyone or any organisation outside the SETA about the status of an application during the assessment process.	

Consent

I, the learner, hereby state that I have read the above and understood the contents thereof. I was given the opportunity to clarify any issues relating to the assessment process and my assessment plan. I have requested this assessment of my own free will and without duress.

Learner's Signature		Date:	
Assessor's Signature		Date:	



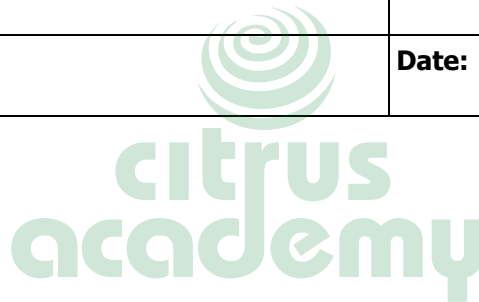
Step 2

Learner Declaration of Authenticity

It is important that we make sure that each learner supplies original evidence completed by himself / herself and according to the level of knowledge and skill that he / she has acquired from the learning process.

Please sign the following declaration:

I hereby declare that the following documentary evidence is my own. I certify that the process followed was ethical and did not infringe on the copyright of any individual or organisation.			
Learner's Signature		Date:	
Assessor's Signature		Date:	



Step 3

Learning Assumed to Be in Place

Do you have all the knowledge and skills necessary to begin this learning process?

This is a level 5 module of learning, and we have to make sure that you have already learnt all the skills, knowledge and attitudes that you will need to use in this module. It will help you to understand and learn more easily in this module, and it is important that we know whether you are ready to move on.

Please look at the list of unit standards below of modules that you should have completed before undertaking this one. Tell us whether you have completed each of the unit standards or modules, and if you did, tell us when you learnt this.

If you need help in understanding this list, please ask the facilitator or assessor.

<i>NQF Level</i>	<i>Unit Standard Number</i>	<i>Learning Module Name</i>	<i>No, I Have Not Completed It</i>	<i>Yes, I Have Completed It</i>	<i>If Yes, When Did You Complete It?</i>
4		Learners accessing this qualification will have demonstrated competence against the standards in the National Certificate in Marketing, Marketing Communication or Marketing Research or Marketing Management or Customer Management or equivalent at NQF Level 4.			
Learner's Signature			Date:		
Assessor's Signature			Date:		

Step 4

Learner Assessment Plan for Gathering of Evidence

As the assessor has explained to you, the aim of an assessment is not to catch you out, but rather to help you develop all the skills, knowledge and attitudes that you need to move forward. It is important that you know what is expected from you and that you play an active role every step of the way.

Let us plan for the assessment together. Below are the steps that you have to work through in order to show that you are competent in this module. Check them carefully and discuss each step with the assessor. Agree with the assessor on the dates on which each step has to be completed or documents handed in. Write the dates in the right-hand column as a reminder.

Learner Assessment Plan		
Module / Unit Standard Name:		Integrate marketing plans with business process
Module / Unit Standard Registration Number:		10050
<i>Step Number</i>	<i>Step Description and Learner's Tasks</i>	<i>Completion / Submission Date</i>
5	Assessment Activity Workbook - In this step, you complete certain tasks in class or as homework. - It is important that you complete every task and understand why it is necessary, because it will help you to gain the knowledge, skills and attitudes that you need to be found competent in this learning module. - If there are things that you are unsure about, please ask the facilitator or the assessor to explain it to you again. - You hand in the completed workbook to the facilitator or assessor who will help you to check your progress. - The assessor or facilitator mark it and discuss areas that need more work with you.	
6	Road Show Multimedia Presentation - There are many important things that you need to remember about marketing in order to be found competent in this learning module, and so that you can do your job well and move on to level six. - You have to take into account all the facts and factors that you have learnt, and complete the summative assessment, in order to be found competent. - There is a detailed list of things that you need to know in this guide and examples of the types of information that you will have to relay in your presentation. - Please prepare yourself well and remember to ask the facilitator or assessor to explain anything that you don't understand.	

7	Attitudes and Attributes Assessment - You have to develop very specific character traits and attitudes and have to be able to do very specific tasks to be competent in this learning module, be good in this job, and to be able to move on to level six. - Going out into the field, and showing and explaining certain skills and attitudes, is the most appropriate way for you to show that you are competent in the skills and attitudes that are needed. - You will have an opportunity to practice these tasks and develop these attitudes during your practical learning module. - There is a list of all the things that you would have to be able to show and explain in this guide. - Please prepare yourself well and remember to ask the facilitator or assessor to explain anything that you don't understand.		
8	Re-Assessment Procedure - What if the assessor tells you that you have not met the right standard or that you still need more evidence to prove your competence? - The assessor explains to you exactly what you need to do or learn to become competent. - You and the assessor and / or facilitator, develop an action plan together, and you may be granted a second or even a third opportunity to prove your competence. - Remember you have the right to appeal against the assessor's decision, if you feel it is unfair. There is a copy of the form in the back of this guide if you need it.		
9	Paperwork - If you have met the standard that is explained for each step of the process you will be found competent in this unit standard. - The assessor will discuss everything with you in detail and will ask you to fill in and sign forms throughout the process. - You will also be given an opportunity to write down any comments you might have on the assessment process. - Once the assessor has given you the final declaration of competence, you will be asked to give some feedback in order to help everyone to improve the learning and assessment process. - Please think carefully. It might really help other learners in the future.		
10	Administration and Completion of Portfolio of Evidence All the documents, or copies of them, must be kept on file as part of your portfolio of evidence.		
Into the Future - The assessor will discuss what happens next and when you will get a certificate of competence. - It is also important to remember that you learnt this module for a specific reason. Discuss with the assessor, facilitator, mentor, and / or coach how you can move forward in your career with this level of competence. - Also remember that the learning process never stops. Plan together with the assessor, facilitator, coach, and / or mentor what you need to learn next.			
Learner's Signature		Date:	
Assessor's Signature		Date:	

Step 5

Assessment Activity Workbook

- The activities that follow are designed to help you gain the skills, knowledge and attitudes that you need in order to become competent in this learning module.
- It is important that you complete all the activities and worksheets, as directed in the learner guide and at the time indicated by the facilitator.
- It is important that you ask questions and participate as much as possible in order to play an active role in reaching competence.
- When you have completed all the activities and worksheets, hand this workbook in to the assessor who will mark it and guide you in areas where additional learning might be required.
- You should not move on to the next step in the assessment process until this step is completed, marked, and you have received feedback from the assessor.

Activity 1 – Experiential Research and Analytical Report

While working in the marketing environment of an organisation involved with the marketing of citrus produce, do experiential research and draft a detailed analytical report on the following factors:

- External environmental factors and its impact upon the marketing activities related to citrus.
- Internal influences on the marketing organisation and their impact upon the marketing activities related to citrus.

The marketing activities to take into account for your report should include:

- All forms of marketing communications
- Direct marketing and relationship marketing
- Sponsorships
- Event marketing
- Sales promotions
- Public relations
- Possible alternative marketing strategies

Some of the broad factors influencing consumer behaviour to take into account might include:

- Psychological factors (needs, perception, learning, attitudes and personalities)
- Social factors (family, social class, reference groups, opinion leaders and culture)

Attach the report to your portfolio of evidence.

Activity 2 – Group Discussion

Hold a group discussion on the following topic:

"Marketing research and marketing information systems play an important role in investigating and understanding operations of the market place."

Mind map for each function listed below, focussing on the importance and distinguishing characteristics of each element.

1. Information systems used for collating, processing, analysing and producing marketing information are identified.
2. The need for quality information in making marketing decisions and developing marketing.
3. Research functions for establishing and maintaining markets are identified and are sensitive to cultural and ethnic differences.





Activity 3 – SWOT Analysis

For each of the following potential citrus markets, complete a SWOT analysis and make recommendations with regard to the factors that are listed.

Export Market

<u>Strengths</u>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>
Recommendations:	
Dimensions of the market	
Features of the typical consumer	
Features of the non-consumer and reasons for their lack of consumption	
Competitive products and features compared to our own product	
Current and future services related to our product	
Meeting the specific needs of different ethnic and indigenous consumers, societies and end users	

Strengths

Weaknesses

Opportunities

Threats

Recommendations:

Dimensions of the market

Features of the typical consumer

Features of the non-consumer and reasons for their lack of consumption

Competitive products and features compared to our own product

Current and future services related to our product
--

Meeting the specific needs of different ethnic and indigenous consumers, societies and end users

Informal Domestic Market

<u>Strengths</u>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>
Recommendations:	
Dimensions of the market	
Features of the typical consumer	
Features of the non-consumer and reasons for their lack of consumption	
Competitive products and features compared to our own product	
Current and future services related to our product	
Meeting the specific needs of different ethnic and indigenous consumers, societies and end users	

Alternative Markets

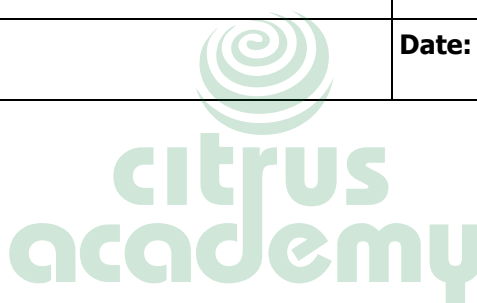
<u>Strengths</u>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>
Recommendations:	
Dimensions of the market	
Features of the typical consumer	
Features of the non-consumer and reasons for their lack of consumption	
Competitive products and features compared to our own product	
Current and future services related to our product	
Meeting the specific needs of different ethnic and indigenous consumers, societies and end users	

Non-Profit Markets

<u>Strengths</u>	<u>Weaknesses</u>
<u>Opportunities</u>	<u>Threats</u>
Recommendations:	
Dimensions of the market	
Features of the typical consumer	
Features of the non-consumer and reasons for their lack of consumption	
Competitive products and features compared to our own product	
Current and future services related to our product	
Meeting the specific needs of different ethnic and indigenous consumers, societies and end users	

[illegible]

Assessment Feedback Form – Activity Workbook			
		Comments / Remarks	
Feedback to learner on assessment			
Feedback from learner to assessor			
Learner's Signature		Date:	
Assessor's Signature		Date:	



Step 6

Road Show Multimedia Presentation

You are now ready for step six of the assessment process, the design of a road show multimedia presentation. Check your plan carefully to make sure that you prepare in good time.

You have to score an overall mark of at least 85% in this task in order to be found competent.

Inform the assessor if you have any special needs or requirements **before** the agreed date for the hand in of the assessment task. You might, for example, require an interpreter to translate the questions to your mother tongue, or you might need to take this test orally. Please write your request down in your activity workbook on the front page and explain why you have made this request. Ask the assessor to sign next to your request to prove that they are aware of your special request.

Use this checklist to help you plan and prepare for the design and lay-out of your roadshow. These are examples of possible questions that will help you to organise and plan your task. All the information you need was taught in the classroom and can be found in the learner guide that you received.

Design a multimedia presentation of at least 20 to 30 minutes for a road show for emerging farmers in the citrus industry. Use the following framework for your presentation

<i>Example Questions</i>	<i>I Have Revised This and Understand It Well</i>	<i>I Am Unsure of This and Need to Ask the Facilitator or Assessor to Explain It Again</i>
Monitoring the marketing environment and determining variables for marketing activities		
The marketing activities to take into account for your enterprise should include:		
• All forms of marketing communications		
• Direct marketing and relationship marketing		
• Sponsorships		
• Event marketing		
• Sales promotions		
• Public relations		
• Possible alternative marketing strategies		
Some of the broad factors influencing consumer behaviour to take into account might include:		
• Psychological factors (needs, perception, learning, attitudes and personalities)		
• Social factors (family, social class, reference groups, opinion leaders and culture).		
Distinguishing the role of marketing research and marketing information systems in investigating and understanding the operations of the market place		

Example Questions	<i>I Have Revised This and Understand It Well</i>	<i>I Am Unsure of This and Need to Ask the Facilitator or Assessor to Explain It Again</i>
The importance and distinguishing characteristics that each element and its role listed below:		
Information systems used for collating, processing, analysing and producing marketing information are identified.		
The need for quality information in making marketing decisions and developing marketing.		
Research functions for establishing and maintaining markets are identified and are sensitive to cultural and ethnic differences.		
Distinguishing characteristics of major markets		
SWOT analyses of:		
Export market		
Formal domestic market		
Informal domestic market		
Alternative markets		
Non-profit markets		
Criteria for explanations and recommendations:		
Dimensions of the market		
Features of the typical consumer		
Features of the non-consumer and reasons for their lack of consumption		
Competitive products and features compared to our own product		
Current and future services related to our product		
Meeting the specific needs of different ethnic and indigenous consumers, societies and end-users		

The assessor or facilitator has explained this step to me and I have revised these questions.			
Learner's Signature		Date:	
Assessor's Signature		Date:	

The assessor will give you feedback on the test and guide you if there are areas in which you still need further development.

Step 7

Attitudes and Attributes Assessment

You are now ready for step seven of the assessment process, the attitude and attribute assessment. Check your plan carefully to make sure that you prepare in good time.

Inform the assessor if you have any special needs or requirements before the agreed date for the assessment. You might, for example, require an interpreter to translate the questions to your mother tongue, or you might need to take this assessment orally. Please write your request down in your activity workbook on the front page and explain why you have made this request. Ask the assessor to sign next to your request to prove that they are aware of your special request.

Use the checklist below to help you prepare for when you are observed on the attitudes and attributes that you need to have to be found competent for this learning module.

<i>Observations</i>	<i>I Am Sure of This and Understand It Well</i>	<i>I Am Unsure of This and Need to Ask the Facilitator or Assessor to Explain What It Means</i>
Can you identify problems and deficiencies correctly?		
Are you able to work well in a team?		
Do you work in an organised and systematic way while performing all tasks and tests?		
Are you able to collect the correct and appropriate information and / or samples as per the instructions and procedures that you were taught?		
Are you able to communicate your knowledge orally and in writing, in such a way that you show what knowledge you have gained?		
Can you base your tasks and answers on scientific knowledge that you have learnt?		
Are you able to show and perform the tasks required correctly?		
Are you able to link the knowledge, skills and attitudes that you have learnt in this module of learning to specific duties in your job or in the community where you live?		

- The assessor will complete a checklist that gives details of the points that are checked and assessed by the assessor.
- The assessor will write commentary and feedback on that checklist. They will discuss all commentary and feedback with you.
- You will be asked to give your own feedback and to sign this document.
- It will be placed together with this completed guide in a file as part of your portfolio of evidence.

Step 8

Re-Assessment Procedure

The assessor will discuss in detail with you what to do in case you require a re-assessment, and when the re-assessment will take place.



Step 9

Paperwork

Please assist the assessor by filling in these forms and signing then as instructed.

Learner Information Form			
Unit Standard	10050		
Program Date(s)			
Assessment Date(s)			
Surname			
First Name			
Learner ID / SETA Registration Number			
Job / Role Title			
Home Language			
Gender	Male	Female	
Race	African	Coloured	Indian/Asian White
Employment	Permanent	Non-permanent	
Disabled	Yes	No	
Date of Birth			
ID Number			
Contact Telephone Numbers			
Email Address			
Postal Address			

Assessor Report and Summative Evidence Collection Summary for Unit Standard 10050 – Level 5					
Description	Evidence Gathered		Benchmark	Competent / Not yet Competent	Feedback and Comments
	Foundational and Embedded Knowledge	Practical Skills, Underpinning Knowledge and Reflexive Competence			
Specific Outcome 1: Monitor the marketing environment and determine variables for marketing activities	Attend all lectures Complete workbook as per instruction	Summative assessment. Observation checklist of attitudes and attributes.	85% competence in all areas		
Specific Outcome 2: Distinguish the role of marketing research and marketing information systems	Attend all lectures Complete workbook as per instruction	Summative assessment. Observation checklist of attitudes and attributes.			
Specific Outcome 3: Distinguish characteristics of major markets	Attend all lectures Complete workbook as per instruction	Summative assessment. Observation checklist of attitudes and attributes.	85% competence in all areas		
Specific Outcome 4: Identify influences on consumer behaviour in relation to marketing activities	Attend all lectures Complete workbook as per instruction	Summative assessment. Observation checklist of attitudes and attributes.	85% competence in all areas		
Embedded Knowledge: The learner is able to demonstrate a basic knowledge of: 1. A general overview of the organisation's overall business strategies. 2. A basic understanding of the organisations marketing and communications strategies and plans. 3. A general and broad understanding of the elements of the marketing mix and marketing mix components.	Attend all lectures Complete workbook as per instruction	N/a	Overall minimum test score of 85%		

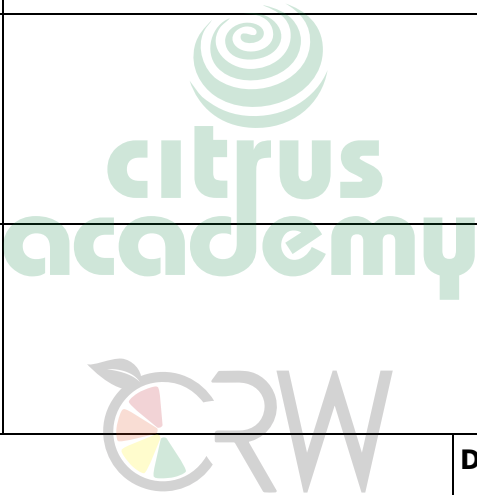
Assessor Report and Summative Evidence Collection Summary for Unit Standard 10050 – Level 5					
Description	Evidence Gathered		Benchmark	Competent / Not yet Competent	Feedback and Comments
	Foundational and Embedded Knowledge	Practical Skills, Underpinning Knowledge and Reflexive Competence			
Unit Standard CCFOs: 1. Problem solving relates to all specific outcomes 2. Teamwork relates to all specific outcomes 3. Self-organisation and management relates to all specific outcomes 4. Information evaluation relates to all specific outcomes 5. Communication relates to all specific outcomes 6. Use science and technology relates to all specific outcomes 7. Inter-relatedness of systems relates to all specific outcomes 8. Self-development relates to all specific outcomes	N/a	Rating Scale	Minimum rating of 3:5 in each criteria or overall average of 3:5		

Learner Assessment Re-Actionnaire			
Questions		Response	
How did the assessor encourage you to be involved in the assessment process?			
Did the assessor take your special needs into account? If so, how?			
Did the assessor agree on the assessment procedures with you?			
Was feedback relevant to your needs?			
Were you always aware of the outcome of the assessment?			
Did the assessor help you to explore ways of becoming competent whenever you were judged NYC?			
Did the assessor allow you to ask questions?			
Did you always agree with assessment decisions?			
Was all appropriate documentation completed and signed and did you receive copies?			
Did the assessor assist or prevent you in any way when gathering evidence so as to obscure its authenticity?			
All the evidence submitted in my name is my authentic work, which was not acquired by any unethical means.			
Learner's Signature		Date:	
Assessor's Signature		Date:	
Moderator's Signature		Date:	

Assessor's Assessment Review and Improvement Document	
Issues	Comments
Did the assessment go according to plan?	
Did anything unexpected happen?	
Were you pleased with the assessment decision; i.e. was it what you expected?	
How could the process have been carried out more efficiently?	
How could the process of assessing the knowledge be improved?	
How could the Performance Observation checklist be improved?	
Was the evidence you gathered sufficient to make a judgment of competence?	
Was the way you obtained feedback from the learner effective?	
Were you pleased with the way you communicated your decision to the learner? If not, how could this have been improved?	
How would you improve the assessment process?	

Assessment Appeal Form

Any candidate has the right of appeal against any not-yet-competent decision by the assessor. If you wish to appeal, please complete the form below.

Appeal Form			
I hereby appeal against the outcome of my assessment.			
Date:			
Learner's Name:			
Assessors Name:			
Organisation:			
Assessment Details: Criteria, role, standards Used, etc.			
Issue to be Reviewed:			
Learner's Signature		Date:	
Assessor's Signature		Date:	

Step 10

Administration and Completion of Portfolio of Evidence

All the documents or copies thereof, as prescribed previously, must be kept on file as part of the learner portfolio of evidence.

