



Australian Government

Department of Education, Employment and Workplace Relations

BSBMKG515A Conduct a marketing audit

Revision Number: 1

BSBMKG515A Conduct a marketing audit

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	<p>This unit describes the performance outcomes, skills and knowledge required to prepare for, conduct and report on a marketing audit in accordance with an organisation's marketing plan.</p> <p>No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.</p>
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Application of the Unit

Application of the unit	<p>This unit applies to individuals working in a marketing management role who are required to develop a comprehensive description of the organisation's marketing operations as part of the marketing planning and management auditing process of an organisation. The outcomes of marketing audits generally are used to inform an organisation's marketing plan.</p>
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

Employability Skills Information

Employability skills	This unit contains employability skills.
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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.
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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare for a marketing audit	1.1. Identify <i>main purposes of the marketing audit</i> in accordance with organisational requirements 1.2. Determine scope of the marketing audit and audit methodology in accordance with organisational requirements 1.3. Determine appropriate times when a marketing audit should be undertaken, in accordance with organisational requirements 1.4. Identify participants likely to be involved in carrying out a marketing audit
2. Identify the form of a marketing audit	2.1. Identify main characteristics of a marketing audit in terms of relevance to the task and audit priorities 2.2. Identify main elements to be included in a marketing audit and its format, in accordance with organisational requirements 2.3. Identify various forms of a marketing audit and select those that best meet the requirements of the marketing plan, in accordance with organisational requirements
3. Conduct an external marketing audit	3.1. Identify <i>criteria to use in an external marketing audit</i> , in accordance with organisational requirements 3.2. Identify and describe in qualitative and quantitative terms <i>external environmental factors</i> which meet the requirements of the audit process 3.3. Identify and describe in qualitative and quantitative terms the technological factors, market characteristics and competitive factors relating to or affecting the business, which meet audit process requirements
4. Conduct an internal marketing (self) audit	4.1. Identify <i>criteria to use in an internal marketing audit</i> in accordance with organisational requirements 4.2. <i>Describe the marketing organisation</i> in accordance with organisational and audit requirements 4.3. Describe the <i>marketing systems</i> in accordance with organisational and audit requirements 4.4. Identify the marketing productivity in terms of profitability and cost effectiveness, and record the results in accordance with organisational and audit requirements

ELEMENT	PERFORMANCE CRITERIA
5. Prepare a marketing audit report	5.1. Write a marketing audit report in accordance with organisational requirements 5.2. Ensure marketing audit report meets the reporting requirements of the marketing audit form selected 5.3. Ensure marketing audit report meets the requirements of the marketing plan

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to identify relevant information, and to prepare reports with complex marketing concepts and ideas
- research and data collection skills to collect internal and external marketing information.

Required knowledge

- elements of marketing planning
- key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as:
 - anti-discrimination legislation
 - occupational health and safety
 - privacy laws
 - Trade Practices Act
- organisational business and marketing plans
- research methodologies and data collection techniques appropriate to the marketing services industry
- types of marketing audits.

Evidence Guide

EVIDENCE GUIDE	
<p>The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.</p>	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> conducting, documenting and reporting on an internal and external audit of an organisation's marketing activities in accordance with organisational reporting requirements.
Context of and specific resources for assessment	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> access to office equipment and resources access to appropriate documentation and resources used to conduct marketing audit activities.
Method of assessment	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following assessment methods are appropriate for this unit:</p> <ul style="list-style-type: none"> assessment of written marketing audit reports direct questioning combined with a review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate observation of presentations of marketing audit reports oral or written questioning review of authenticated documents from the workplace or training environment review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	<ul style="list-style-type: none"> Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: other marketing units.

Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Main purposes of the marketing audit may include:

- investigating the potential macro- and micro-environmental factors which may affect business and marketing operations
- obtaining a comprehensive description of all major marketing activities of the organisation
- providing a basis for marketing planning activities

Criteria to use in an external marketing audit may include:

- business and competitor characteristics
- consumer needs
- credit availability
- demographics
- forecast trends such as:
 - age
 - growth
 - income
 - regional distribution of population
 - size
- general effects that changes in the law and politics may have on the organisation
- influence of technology on the operations and substitution of products and services on the organisation's business
- interest rates and cost of capital
- macro-external environment elements, including:
 - demographic
 - economic
 - ethical
 - physical/geographic
 - political/legal
 - social/cultural
 - technological
- material shortages

RANGE STATEMENT	
	<ul style="list-style-type: none"> • micro-external environment elements, including: <ul style="list-style-type: none"> • buyer and consumer behaviour • collaborators and alliance partners • competition • market demand • product or service usage • social and cultural factors • unemployment
<i>External environmental factors</i> may include:	<ul style="list-style-type: none"> • business environmental factors • general economic and demographic environmental factors • political, fiscal and legal environmental factors • social and cultural environmental factors
<i>Criteria to use in an internal marketing audit</i> may include:	<ul style="list-style-type: none"> • existing research data and marketing information systems • industry sources • internal data such as sales, promotions and product or service development • organisation structures • supply chain management and logistics
<i>Describing the marketing organisation</i> may include:	<ul style="list-style-type: none"> • functional efficiency • internal interface within the organisation • organisation's formal structure
<i>Marketing systems</i> may include:	<ul style="list-style-type: none"> • marketing control • marketing information • marketing planning • product, service and concept related systems

Unit Sector(s)

Unit sector	
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Competency field

Competency field	Business Development - Marketing
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Co-requisite units

Co-requisite units		