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AIDS HELPLINE: 0800-0123-22 Prevention is the cure

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GOVERNMENT NOTICES

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

No. 1202

21 November 2001

PUBLIC NOTICE BY NSB 05, EDUCATION, TRAINING AND DEVELOPMENT, TO REGISTER AN SGB FOR PRACTITIONERS SPECIALISING IN BARRIERS TO LEARNING AND DEVELOPMENT
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NSB 05 hereby registers an SGB for Practitioners Specialising in Barriers to Learning

BRIEF OF THE SGB

1. Analyse the concepts of 'barriers to learning and development' and investigate the sites of learning, types of practitioners, and types of educational practice involved in addressing the needs of learners with barriers to learning and development.
2. Based on the analysis conducted in (1), design learning pathways and identify standards and qualifications for Barriers to Learning and Development for all practitioners in field 05. *[Regulation 24 (1)(e)]*
3. Analyse existing standards in Field 05 to identify the extent to which they assist practitioners in the various sub-fields to teach learners with barriers to learning and development in mainstream educational contexts.
4. Monitor the continued generation of standards for practitioners across the sub-fields in Field 05, and, if necessary, generate additional barriers to learning and development standards for inclusion in the practitioner qualifications prepared by other SGBs.
5. Generate at least the following qualifications
 - Certificate at level 4 in the education of learners with barriers to learning and development.
 - Diploma at level 5 in the education of learners with barriers to learning and development, with one of the following specialisations - deaf, visual disability, hearing and visual disability, physical disability, intellectual disability, learning difficulties, emotional difficulties.
 - Degree at level 6 in the education of learners with barriers to learning and development, with one of the following specialisations - deaf, visual disability, hearing and visual disability, physical disability, intellectual disability, learning difficulties, emotional difficulties.
 - Certificate at level 6 in mentoring non-specialist educators so that they can assist learners with barriers to learning and development. *[Regulation 24 (1)(a)]*
6. Recommend the qualifications and standards generated under 5 above to the NSB. *[Regulation 24 (1)(c)]*
7. Recommend criteria for the registration of assessors and moderators or moderating bodies. *[Regulation 24 (1)(d)]*
8. Review these qualifications and standards and effect the necessary changes. *[Regulation 24 (1)(b)]*
9. Perform such other tasks as may from time to time be assigned by the NSB. *[Regulation 24 (1)(e)]*

COMPOSITION OF THE SGB

NOMINEE	WORKPLACE	NOMINATING BODY	QUALIFICATION/ EXPERIENCE
Beer, C	Retired	SA Federation for Mental Health	Diploma in Education, Chairperson of the Division for Mental Handicap of SAFMH
Birkett, P	Early Learning Resource Unit	Early Learning Resource Unit	HDE, Facilitator of training of trainers
Bressan, A	Cato Manor Technical College	Cato Manor Technical College	B A,HDE- Head Business Studies Division and Coordinator of Special Needs Education
Condy, J	Cape Technikon	Committee of Technikon Principals	M Sc, Lecturer in Special Educational Needs
Foggitt, G	Fulton School for the Deaf	Fulton School for the Deaf	B A, Teacher
Higgerty, M	The SA Guide-dogs Association for the Blind	The SA Guide-dogs Association for the Blind	B SocSc, Principal of the Orientation and Mobility School
Khumalo, M	SA Federal Council on Disability	SA Federal Council on Disability	B A(Hons), Coordinator of Education, Arts and Culture, Sport and Recreation in SAFCD
Koudstaal, C	Unica School for the cerebrally disabled	Autism SA	B A(Speech Therapy), Principal at Unica school for the cerebrally disabled
Kruger, D	Educational Psychologist (private practice)	UNISA	D Ed, Educational psychologist and Senior Lecturer in Special Needs Education at UNISA
Landsberg, E	UNISA	UNISA	M Ed, Senior Lecturer in Special Needs Education
Levin	Dept of Education	Dept of Education	B Ed (Hons), Project Manager of DANIDA Inclusive education project

Mahlangu, E	Dept of Education	Dept of Education	B Admin. UED, Deputy Chief Education Specialist in the ELSEN Directorate
Moodley, S	Research and Development Consultant	Disabled People of South Africa	M Ed, Research and Development Consultant
Mudau, P	Sekhukhune College of Education	Sekhukhune College of Education	B Ed, Lecturer in Remedial Education
Muller, P	Down Syndrome SA	Down Syndrome SA	Chairperson Down Syndrome Association Western Cape
Palime, B	Office on the Status of Disabled Persons	Office on the Status of Disabled Persons	BA Hons, Deputy Director-Liaison Services
Pooe, D	Dept of Social Development	Dept of Social Development	BA Hons, Deputy Director
Reddy, M	New Beginnings Early Childhood Development Project	SA Congress of Early Childhood Development	Diploma (Pre School Teaching, Curriculum Developer
Saunders, P	Western Cape Dept of Education	National Council for Persons with Physical Disability in SA	M Ed, Senior Deputy Chief Education Specialist
Schoeman G.H.	SA National Council for the Blind	SA National Council for the Blind	D Ed, Education Consultant
Storbeck, C	Wits University	DEAFSA	PhD, Coordinator of Deaf Education
Tyawa, B	Wits University	Wits University	M Ed, Lecturer in the Division of Specialised Education

No. 1203

21 November 2001

**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Financial Services

Registered by NSB 03, Business, Commerce and Management Studies, publishes the following unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purposes of the qualifications, and the titles and specific outcomes of the unit standards upon which qualifications are based. The full qualifications and unit standards can be accessed via the SAQA web-site at www.saga.co.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, 659 Pienaar street, Brooklyn, Pretoria.

Comment on the unit standards should reach SAQA at the address *below and no later than 19 December 2001*. All correspondence should be marked **Standards Setting – SGB for Financial Services** and addressed to

The Director: Standard Setting and Development
SAQA
Attention: Mr. D Mphuthing
Postnet Suite 248
Private Bag X06
Waterkloof
0145
or faxed to 012 – 482 0907

PP **SAMUEL B.A. ISAACS**
EXECUTIVE OFFICER

SOUTH AFRICAN QUALIFICATIONS AUTHORITY



Established in terms of Act 58 of 1995

Unit Standards for National Certificates in Banking Levels 2- 5

Field: Business, Commerce and Management Studies

Sub-field: Financial Services

The International Unit Standards listed below are intended for learners who wish to attain one or more of that registered National Certificates in Banking from levels two to five (2-5). They may be selected as either core or elective unit standards for purposes of these qualifications dependent on the purpose of the particular qualification chosen.

1. Process reimbursement authorisation	2. Manage foreign currency accounts	3. Authorise and release reimbursement payments
4. Process forward exchange contracts	5. Process export letters of credit	6. Authorise and release foreign finance loans
7. Process import letters of credit	8. Authorise and release an import letter of credit / amendment	9. Authorise and release an export letter of credit
10. Authorise and release forward exchange contracts	11. Process foreign finance loans	12. Consult to clients on trade related issues

Title: Process reimbursement authorisation

Level: 3 **Version:** 1 **Language:** E
Credits: 4

Issue Date: April 2001
Review Date: April 2004

Field: Business, Commerce and Management Studies
Sub-field: Banking

Purpose: Persons credited with this unit standard will be able to receive a reimbursement authorisation, process the reimbursement claim and attend to queries.

Learning Assumptions: This unit standard should be completed subsequent to the unit standard or processing import letters of credit.

Specific Outcome No.1

Explain rules and regulations related to reimbursement authorisation.

Assessment Criteria

- 1.1** The nature of the transaction is understood and explained according to the specific bank's policy and procedure.

Range: the nature of the underlying transaction, how the transaction works, the process for payment, the parties to the transactions and their rights and obligations. Evidence of competence across the full range is required.

- 1.2** The relevant South African legislation affecting reimbursement authorisation is identified and explained in line with the intention of the legislation, and bank policy and procedure in the manner required by the bank.

Range: Exchange Control regulations, Bills of Exchange Act. Evidence of competence across the full range is required.

- 1.3** The relevant international regulations and accepted practice governing reimbursement authorisation are understood and explained in the manner required by the bank.

Range : URR 525, UCP500, ICC opinions, international payment systems, SWIFT messages and format. Evidence of competence across the full range is required.

- 1.4** The risks and risk management processes associated with the reimbursement authorisation are understood and explained in the manner required by the bank.

Range: risks from the client's and the banks perspective, country risk, acceptable

practice, payment terms, certain technical risks, exchange rate risk, credit risk, risk associated with non-compliance with the terms and conditions of the letter of credit .. Evidence of competence across the full range is required.

- 1.5 The specific banks electronic process for processing reimbursement authorisations is understood and explained in the manner required by the bank.

Range: access to the system, opening a record, printing records/ reports, making amendments, correcting mistakes, processing and capturing rules and regulations.

Specific Outcome No. 2

Receive reimbursement authorisation

Assessment Criteria

- 2.1 The reimbursement authorisation is received and recorded according to standard procedures.
- 2.2 The reimbursement authorisation is scrutinised for completeness and compliance with URR525.
- 2.3 Entries for charges, liabilities and exposure are prepared as appropriate and according to standard procedures.

Specific Outcome No. 3

Process the reimbursement claim

Assessment Criteria

- 3.1 The reimbursement claim is received according to standard procedures.
- 3.2 The claim is scrutinised against the reimbursement authority and URR525.
- 3.3 The claim is processed in accordance with reimbursement authority instructions and in terms of standard procedures.
- 3.4 Entries are prepared as required by the bank.
- 3.5 Discrepant claims are handled according to standard procedures and URR525.
- 3.6 Advice to all parties is prepared according to standard procedures and in terms of URR525.

Specific Outcome No. 4

Attend to queries

Assessment Criteria

- 4.1 The nature of the query received is identified according to the bank's procedures.
- 4.2 Queries are attended to as required by the nature of the query and the bank's procedures.
- 4.3 All queries are handled in a timely manner that promotes customer service.
- 4.4 Administrative tasks related to the query are completed according to the bank's procedures.
- 4.5 Unresolved queries are escalated to the appropriate authority as required by the bank's policy.

ACCREDITATION PROCESS (INCLUDING MODERATION)

- 1 Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
- 2 Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.
- 3 Moderation of assessment will be overseen by the relevant ETQA according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

Therefore anyone wishing to be assessed against this unit standard may apply to be assessed by any assessment agency, assessor or provider institution which is accredited by the relevant ETQA.

Special Notes**1. Critical Cross - Field Outcome**

- 1.4 The learners is able to evaluate and process a reimbursement claim.
- 1.5 The learner is able to communicate effectively when handling applicable queries.

2. Embedded Knowledge

Working knowledge of types of letter of credit.

Working knowledge of letter of credit issuing procedures and systems.

Working knowledge of internal and international payment systems.

Working knowledge of URR525.

Working knowledge of internal controls.

Working knowledge of SWIFT message formats.

Operating and computer systems knowledge sufficient to locate the necessary information and complete the task/function.

General understanding of the specific risks, and relevant policies and laws relating to foreign exchange transactions.

Title: Manage Foreign Currency Accounts

Level: 4 **Version:** 1 **Language:** E
Credits: 20

Issue Date: April 2001
Review Date: April 2004

Field: Business, Commerce and Management Studies
Sub-field: Banking

Purpose: Persons credited with this unit standard will be able to explain rules and regulations relating to foreign currency accounts, set up the foreign currency account, process transactions over the account, close the account and attend to queries.

Learning Assumptions: Persons attempting this unit standard will be required to have an understanding of the basic Exchange Control rulings and exchange rate mechanisms, as well as a knowledge of foreign exchange currencies and basic International trade concepts. They should be familiar with basic currency conversions.

Specific Outcome No.1

Explain rules and regulations related to foreign currency accounts.

Assessment Criteria

- 1.1** The nature of the account is understood and explained according to the specific bank's policy and procedure.

*Range: the nature of the underlying transactions, how the account works, the process for statements and balance, terms and conditions, pricing, features and benefits.
Evidence of competence across the full range is required.*

- 1.2** The relevant South African legislation affecting foreign currency accounts is identified and explained in line with the intention of the legislation, and bank policy and procedure in the manner required by the bank.

Range: Exchange Control regulations. Evidence of competence across the full range is required.

- 1.3** The risks and risk management processes associated with the foreign currency account are understood and explained in the manner required by the bank.

Range: risks from the client's and the banks perspective, country risk, acceptable practice, trade insurance, technical risks, exchange rate risk, credit risk. Evidence of competence across the full range is required.

- 1.4 The specific banks electronic process for processing foreign currency accounts and transactions over accounts is understood and explained in the manner required by the bank.

Range: access to the system, opening a record, printing records/ reports, making amendments, correcting mistakes, processing and capturing rules and regulations.

Specific Outcome No. 2

Set up the foreign currency account

Assessment Criteria

- 2.1 The request for a foreign currency account is received and checked for completeness and compliance with the bank's policy.
- 2.2 The request for a foreign currency account is checked for compliance with exchange control regulations.
- 3.3 The client is advised for the pricing and charges associated with the account and the transactions processed on the account.
- 2.4 The client is advised of the exchange control regulations governing the use of the account in a manner the client should understand.
- 2.5 The account is opened in line with the banks policy and procedures and exchange control regulations.
- 2.6 Credit authorisation is obtained where necessary according to the bank's policy.
- 2.7 Where necessary a credit limit is loaded for the account according to standard procedures and credit authorisation.
- 2.8 Appropriate charges associated with opening of the account are recovered according to the bank's policy and procedures.
- 2.9 The client is advised when the account becomes operational and is informed of the procedures for use of the account.

Specific Outcome No. 3

Process transactions over the account.

Range : Import payments, export proceeds, inward or outward freight costs.

Assessment Criteria

- 3.1 Foreign amounts received are checked for compliance with exchange control regulations and correctly deposited into the account in terms of exchange control regulations and the banks policy and procedure.
- 3.2 Funds are transferred into Rand accounts in terms of client instructions, bank procedure and exchange control regulations.

- 3.3 Interest payable or accrued monthly is processed in terms of client instructions, bank procedure and exchange control regulations.
- 3.4 Charges associated with the transactions are calculated and processed in line with banking procedure.
- 3.5 The client is provided with information on the account on request, statements on the account are provided in line with bank policy.
- 3.6 Foreign funds paid from the account and deposited into the account are correctly applied to corresponding transactions in the manner required by the bank and are processed in line with exchange control regulations.
- 3.7 Import payments are made in terms of the client's instructions, review of original import documents and in line with exchange control requirements.
- 3.8 The account balance is monitored in line with the credit limit on the account.
- 3.9 The term for which foreign funds are held in the account is monitored in line with exchange control requirements.
- 3.10 The account is monitored to ensure it does not become dormant in line with exchange control regulations.
- 3.11 The client is notified of any activity, transaction, dormancy that does not comply with exchange control regulations, and corrective action is taken in terms of the client's instruction.
- 3.12 The client is notified of foreign funds held in the account that are close to the exchange control expiry.
- 3.13 Disposal instructions for transfer of foreign funds into Rand accounts are obtained for foreign funds held longer than allowed by exchange control regulations.

Specific Outcome No. 4

Close the account.

Assessment Criteria

- 4.1 The instruction to close the account is received from the client and checked in line with authorised signatures held according to banking policy and procedure.
- 4.2 Disposal or repayment instructions for funds and interest in the account are obtain in writing from the client as required by the bank.
- 4.3 The account is closed according to standard banking procedures.
- 4.4 The disposal or repayment instructions are processed according to standard banking procedures.
- 4.5 Details of disposal or repayment are checked for accuracy, compliance with exchange control and the client's instructions.

- 4.6 Revenue associated with the closing of the account is recovered according to the bank's policy and procedures.

Specific Outcome No.5

Attend to queries.

Assessment Criteria

- 5.1 The nature of the query received is identified according to the bank's procedures.
- 5.2 Queries are attended to as required by the nature of the query and the bank's procedures.
- 5.3 All queries are handled in a timely manner that promotes customer service.
- 5.4 Administrative tasks related to the query are completed according to the bank's procedures.
- 5.5 Unresolved queries are escalated to the appropriate authority as required by the bank's policy.

ACCREDITATION PROCESS (INCLUDING MODERATION)

- 1 Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
- 2 Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.
- 3 Moderation of assessment will be overseen by the relevant ETQA according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

Therefore anyone wishing to be assessed against this unit standard may apply to be assessed by any assessment agency, assessor or provider institution which is accredited by the relevant ETQA.

Special Notes

1.Critical Cross - Field Outcome

- 1.1 The learner is able to monitor foreign amount received for compliance with exchange control regulations.
- 1.5 The learner is able to communicate information effectively to the client.
- 1.6 The learner is able to use technology effectively.

2. Embedded Knowledge

Detailed knowledge of specific banking policy and procedures relating to the task/function performed.

Working knowledge of internal and international payment systems.

Working knowledge of internal controls.

Thorough knowledge of appropriate SWIFT message formats.

Thorough knowledge of exchange rates and treasury procedures.

Thorough knowledge of relevant exchange control regulations.

Thorough knowledge of trade finance.

Operating and computer systems knowledge sufficient to locate necessary information and

complete the task.

General understanding of the specific risks, relevant policies and laws relating to foreign exchange transactions.

General knowledge of the requirements of the Banks Act.

Working knowledge of the Code of Banking Practice.

Title: Authorise and release reimbursement payments

Level: 4 **Version:** 1 **Language:** E
Credits: 16

Issue Date: April 2001
Review Date: April 2004

Field: Business, Commerce and Management Studies

Purpose: Persons credited with this unit standard will be able to authorise acceptance of reimbursement authorisation, authorise and release the reimbursement claim and attend to queries.

Learning Assumptions: This unit standard would be completed subsequent to proven competence in the unit standard for processing reimbursement authorisation (IB007).

Specific Outcome No. 1

Authorise and release reimbursement authorisation

Assessment Criteria

- 1.1 The rules and regulations relating to reimbursement authorisation is understood and explained according to the banks policy and procedure.

Range: the rules and regulations governing the transaction,, local and international legal requirements, exchange control and internal company policy and control procedures. Evidence of competence across the full range is required

- 1.2 The reimbursement authorisation is checked for completeness and compliance with URR525.

- 1.3 Processing errors are corrected in line with company policy and procedure.

Range: minor amendments to details on the system, complete reversal of transactions, reversal of part of a transaction, and reprocessing of a full transaction or part of a transaction. Evidence of competence across the entire range is required.

- 1.4 Entries for charges, liabilities and exposure are checked and released according to standard procedures.

Specific Outcome No. 2

Authorise and release the reimbursement claim

Assessment Criteria

- 2.1 The reimbursement claim is checked against the reimbursement authority and URR525.
- 2.2 The processing of the claim is checked for compliance with reimbursement authority instructions and according to standard procedures.
- 2.3 Entries are checked and released according to standard procedures.
- 2.4 Discrepant claims are checked and handled according to standard procedures.
- 2.5 Advice to all parties is released as required by the bank.

Specific Outcome No. 3

Attend to queries

Assessment Criteria

- 3.1 The nature of the query received is identified according to the bank's procedures.
- 3.2 Queries are attended to as required by the nature of the query and the bank's procedures.
- 3.3 All queries are handled in a timely manner that promotes customer service.
- 3.4 Administrative tasks related to the query are completed according to the bank's procedures.
- 3.5 Unresolved queries are escalated to the appropriate authority as required by the bank's policy.

ACCREDITATION PROCESS (INCLUDING MODERATION)

- 1 Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
- 2 Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.
- 3 Moderation of assessment will be overseen by the relevant ETQA according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

Therefore anyone wishing to be assessed against this unit standard may apply to be assessed by any assessment agency, assessor or provider institution which is accredited by the relevant ETQA.

Special Notes**1. Critical Cross - Field Outcome**

- 1.4 The learners is able to evaluate and process reimbursement claim.
- 1.5 The learner is able to communicate effectively when handling applicable queries.

2. Embedded Knowledge

Working knowledge of types of letter of credit.

Working knowledge of letter of credit issuing procedures and systems.

Working knowledge of internal and international payment systems.

Working knowledge of URR525.

Working knowledge of internal controls.

Working knowledge of SWIFT message formats.

Operating and computer systems knowledge sufficient to locate the necessary information and complete the task/function.

General understanding of the specific risks, and relevant policies and laws relating to foreign exchange transactions.

Title: Process forward exchange contracts

Range : Foreign Exchange Contracts (FEC's), futures and derivatives. Evidence of competence across the full range is required.

Level: 3
Credits: 5

Version: 1

Language: E

Issue Date: April 2001

Review Date: April 2004

Field: Business, Commerce and Management Studies

Sub-field: Banking

Purpose: Persons credited with this unit standard will be able to explain rules and regulations relating to forward exchange contracts establish the contract, source the foreign currency and then manage and close the contract.

Learning Assumptions: This unit standard should be completed subsequent to proven competence in the unit standards for purchasing and selling foreign instruments and processing inward and outward foreign documentary collections.

Specific Outcome No.1

Explain rules and regulations related to forward exchange contracts

Assessment Criteria

- 1.1** The nature of the product is understood and explained according to the specific bank's policy and procedure.

Range: types of forward exchange contracts, the nature of the underlying transaction, how the product works, the process for payment, the parties to the transactions, rights and obligations, terms and conditions, pricing, features and benefits. Evidence of competence across the full range is required.

- 1.2** The relevant South African legislation affecting forward exchange contracts is identified and explained in line with the intention of the legislation, and bank policy and procedure in the manner required by the bank.

Range: Exchange Control regulations, Bills of Exchange Act. Evidence of competence across the full range is required.

- 1.3** The relevant international regulations and accepted practice governing forward exchange contracts are understood and explained in the manner required by the bank.

Range : international payment systems, SWIFT messages and format. Evidence of competence across the full range is required.

- 1.4 The risks and risk management processes associated with the forward exchange contracts are understood and explained in the manner required by the bank.

Range: risks from the client's and the banks perspective, country risk, acceptable practice, payment terms, technical risks, exchange rate risk, credit risk, basic management practices associated with forward exchange contracts. Evidence of competence across the full range is required.

- 1.5 The specific banks electronic process for processing forward exchange contracts is understood and explained in the manner required by the bank.

Range: access to the system, opening a record, printing records/ reports, making amendments, correcting mistakes, processing and capturing rules and regulations.

Specific Outcome No. 2

Establish the contract

Assessment Criteria

- 2.1 Details of the currency requirements are obtained from the client and recorded in the manner required by the bank.
- Range : currency, amount, contract options and time period. Evidence of competence across the full range is required.*
- 2.2 Compliance with exchange control regulations and rulings is established or the necessary approval for the facility is obtained if required, according to standard policy and procedures.
- 2.3 Where necessary, credit authority is obtained and recorded according to standard policy and procedures.
- 2.4 A fixed rate for the currency/pair is determined in liaison with treasury and in the manner required by the bank.
- 2.5 The rate and the terms and condition of the contract are conveyed to the client for acceptance.
- Range : details of the contract, pricing and associated charges, expiry date of contract, contract options, cancellation implications. Evidence of competence across the full range is required.*
- 2.6 The contract for the sale or purchase of currency is completed and processed according to standard procedures.
- Range : client authorisation, verification of signatures, complete, accurate record of contract established. Evidence of competence across the full range is required.*
- 2.7 The fee is confirmed to the client according to standard procedures.
- 2.8 Charges are recovered according to standard procedures.

Specific Outcome No. 3

Process drawings under the contract

Assessment Criteria

- 3.1 Details of the drawings are obtained from the client and recorded in the manner required by the bank.

Range : currency, amount, contract options and time period. Evidence of competence across the full range is required.

- 3.2 Where necessary, settlement instructions are obtained from the client in line with standard procedures.

- 3.3 Depending on the nature of the underlying transaction, the disposal of the currency/pair is arranged in line with standard procedures.

Range : letters of credit, foreign bills for collection, foreign finance loans. Evidence across the full range is required

- 3.4 Each drawing of currency under the contract is recorded according to standard procedures in terms of the contract and in line with exchange control requirements.

- 3.5 Early drawings/rollovers/cancellations are processed according to standard procedures.

- 3.6 Any additional charges are recovered according to standard procedures.

ACCREDITATION PROCESS (INCLUDING MODERATION)

- 1 Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
- 2 Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.
- 3 Moderation of assessment will be overseen by the relevant ETQA according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

Therefore anyone wishing to be assessed against this unit standard may apply to be assessed by any assessment agency, assessor or provider institution which is accredited by the relevant ETQA.

Special Notes**1.Critical Cross - Field Outcome**

1.4 The learners is able to evaluate and process a forward exchange contract.

1.5 The learner is able to communicate effectively when handling applicable queries.

1.6 The learner is able to use technology to process the drawing documents and payments.

- 1.7 The learner is able to understand the relationship between the forward exchange contract and exchange control regulations.

2. Embedded Knowledge

Detailed knowledge of specific banking policy and procedures relating to the task/function performed.

Working knowledge of internal and international payment systems.

Working knowledge of internal controls.

Working knowledge of appropriate SWIFT message formats.

Working knowledge of exchange rates and treasury.

Working knowledge of relevant exchange control regulations.

Operating and computer systems knowledge sufficient to locate necessary information and complete the task.

General understanding of the specific risks, relevant policies and laws relating to foreign exchange transactions.

Working understanding of the different types of foreign finance facilities.

Title: Authorise and release an export letter of credit.

Range : unconfirmed irrevocable letter of credit, confirmed irrevocable letter of credit, sight credit, acceptance credit, deferred payment credit, red clause credit, revolving credit, negotiation credit, standby credit.

Level:	5	Version: 1	Language: E
Credits:	16		
Issue Date:	April 2001		
Review Date:	April 2004		
Field:	Business, Commerce and Management Studies		
Sub-field:	Banking		
Purpose:	Persons credited with this unit standard will be able to check the advisement process, authorise and release drawing documents and attend to queries.		
Learning Assumptions:	This unit standard should be completed subsequent to the unit standards for processing import and export letters of credit, and reimbursement authorisation. It is recommended that persons attempting this unit standard have had some experience in processing letters of credit prior to being assessed on this unit standard.		

Specific Outcome No. 1

Check the advising process.

Assessment Criteria

- 1.1 The processing of the letter of credit is assessed for compliance with standard procedures and policies as required by the bank.
 - 1.2 The processing accuracy of existing input is checked in line with standard procedures.
 - 1.3 Compliance with internationally accepted practice is evaluated according to standard procedures.
- Range : UCP 500 and ICC Opinions.*
- 1.4 The identification of possible risk implications based on the terms and conditions of the credit is checked for appropriate management of the risk as required by the bank.
 - 1.5 The notification to the beneficiary of identified risks and restrictions is checked for accuracy and completeness as required by the bank's policy.
 - 1.6 Confirmation arrangements are checked in the manner required by the bank.
 - 1.7 The recovery of revenue associated with the transaction is checked for accuracy and

compliance with the bank's policy and procedures.

- 1.8 The decision is taken that the procedural requirements of the letter of credit advisement process have been met as required by the bank.
- 1.9 Entries for charges, liabilities and exposure are checked and authorised and released according to standard procedures.

Specific Outcome No. 2

Authorise and release drawing documents

Assessment Criteria

- 2.1 Documents are checked for compliance with the letter of credit and according to UCP 500 and ICC opinions.
- 2.2 Identified discrepancies are checked and handled as required by UCP 500 and the banks standard procedures, and the client/ bank is advised accordingly.
- 2.3 The reimbursement process is checked for accuracy and compliance with the terms of the letter of credit as required by the bank.
- 2.4 The settlement process is checked as required by the bank.
- 2.5 The required credit authorisation for the release of payment before reimbursement is obtained or referred for higher authorisation according to the bank's policies and procedures.
- 2.6 Drawing documents are authorised and released or referred for further authorisation in line with the bank's policies and procedures.

Range : Sight, USANCE and deferred payment drawings.

Specific Outcome No. 3

Attend to queries.

Assessment Criteria

- 3.1 The nature of the query received is identified according to the bank's procedures.
- 3.2 Queries are attended to as required by the nature of the query and the bank's procedures.
- 3.3 All queries are handled in a timely manner that promotes customer service.
- 3.4 Administrative tasks related to the query are completed according to the bank's procedures.
- 3.5 Unresolved queries are escalated to the appropriate authority as required by the bank's policy.

ACCREDITATION PROCESS (INCLUDING MODERATION)

- 1 Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
- 2 Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.
- 3 Moderation of assessment will be overseen by the relevant ETQA according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

Therefore anyone wishing to be assessed against this unit standard may apply to be assessed by any assessment agency, assessor or provider institution which is accredited by the relevant ETQA.

Special Notes**1. Critical Cross - Field Outcome**

- 1.4 The learners is able to evaluate and process letter of credit/amendment.
- 1.5 The learner is able to communicate effectively when handling applicable queries.
- 1.7 The learner is able to understand the relationship between letter of credit/amendment and exchange control regulations.

2. Embedded Knowledge

Thorough understanding of types of letters of credit.
Thorough knowledge of the bank's business allocation policy.
Thorough knowledge of letter of credit issuing procedures and systems.
Working knowledge of the Bills of Exchange Act.
Thorough knowledge of the INCO terms.
Thorough knowledge of URR 525.
Thorough knowledge of UCP 500.
Thorough knowledge and understanding of ICC Opinions.
Thorough knowledge of SWIFT message formats.
Thorough knowledge of applicable exchange controls.
Thorough knowledge of exchange rates and treasury procedures.
Thorough knowledge of internal and international payment systems.
Thorough knowledge of internal controls.
Thorough knowledge of trade finance.
Operating and computer systems knowledge sufficient to locate the necessary information and complete the task/function.
Thorough understanding of the specific risks, and relevant policies and laws relating to foreign exchange transactions.

Title: Process Foreign Finance Loans

Range : Import, export and working capital loans

Level: 4 **Version:** 1 **Language:** E
Credits: 18

Issue Date: April 2001

Review Date: April 2004

Field: Business, Commerce and Management Studies

Sub-field: Banking

Purpose: Persons credited with this unit standard will be able to explain rules and regulations related to foreign finance loans, obtain authority for the establishment of a foreign finance facility, arrange the utilisation of the facility, source the foreign funds, manage the facility and arrange the repayment and rollover of the loan.

Learning Assumptions: This unit standard should be completed subsequent to proven competence in the unit standards for purchasing and selling foreign instruments and processing inward and outward foreign documentary collections.

Specific Outcome No.1

Explain rules and regulations related to foreign finance loans.

Assessment Criteria

- 1.1** The nature of the product is understood and explained according to the specific bank's policy and procedure.

Range: types of foreign finance loans, the nature of the underlying transaction, how the product works, the process for payment, the parties to the transactions and their rights and obligations, terms and conditions, pricing, features and benefits. Evidence of competence across the full range is required.

- 1.2** The relevant South African legislation affecting foreign finance loans is identified and explained in line with the intention of the legislation, and bank policy and procedure in the manner required by the bank.

Range: Exchange Control regulations, Bills of Exchange Act. Evidence of competence across the full range is required.

- 1.3** The relevant international regulations and accepted practice governing foreign finance loans are understood and explained in the manner required by the bank.

Range : exchange rates, credit options, international payment systems, SWIFT

messages and format. Evidence of competence across the full range is required.

- 1.4 The risks and risk management processes associated with the foreign finance loans are understood and explained in the manner required by the bank.

Range: risks from the client's and the banks perspective, country risk, acceptable practice, insurance, payment terms, certain technical risks, exchange rate risk, credit risk, risk associated with non-compliance with the terms and conditions of the loan, basic risk management practices associated with foreign finance loans. Evidence of competence across the full range is required.

- 1.5 The specific banks electronic process for processing foreign finance loans is understood and explained in the manner required by the bank.

Range: access to the system, opening a record, printing records/ reports, making amendments, correcting mistakes, processing and capturing rules and regulations.

Specific Outcome No.2

Arrange the utilisation of the foreign finance facility

Assessment Criteria

- 2.1 Details of the requirements for a foreign finance facility are submitted to the credit authority in the manner required by the bank.
- 2.2 The client's request/instruction is checked against the authorised credit limits and the terms of the credit facility.
- 2.3 Where necessary the request/instruction is referred for higher authorisation according to the bank's credit policy and procedure.
- 2.4 The authorised facility and the associated terms are recorded in the manner required by the bank.
- 2.5 Changes to the loan are recorded in the manner required by the bank and in line with exchange control regulations.

Specific Outcome No. 3

Source the foreign funds.

Assessment Criteria

- 3.1 The details of the loan are checked for accuracy in terms of the client's instructions, conformity to the loan terms and conditions and according to standard procedures.
- 3.2 The foreign finance loan is raised through liaison with the treasury according to standard procedures.

- 3.3 The details of the deal are confirmed according to standard procedures.

Range : amount, currency, exchange rate, interest rate/margin, interest amount, settlement arrangements, date and maturity date of the loan. Evidence of competence across the full range is required.

- 3.4 The funds are disposed of in terms of the client's request/instructions and according to standard procedures.

- 3.5 The customer is advised of the conclusion of the transaction according to standard procedures.

- 3.6 The draw down of funds is recorded according to standard credit and internal accounting procedures and in line with exchange control requirements.

Specific Outcome No. 4

Process loan transactions

Assessment Criteria

- 4.1 Access to foreign finance funds/loan/facility is handled in line with standard credit and internal accounting procedures and according to exchange control requirements.

- 4.2 Foreign funds paid and received in relation to the loan are correctly applied to loan/facility/corresponding transactions in the manner required by the bank and in line with exchange control regulations.

- 4.3 Information relating to the loan is provided to the client, credit authority, and/or other appropriate parties in line with standard procedures.

Range : statements, details of entries passed, balances, interest and charges. Evidence of competence across the full range is required.

Specific Outcome No. 5

Arrange repayment of the foreign finance loan

Range : Foreign finance loans and refinanced/rollover transaction

Assessment Criteria

- 5.1 Prior to the due date, the client is notified of the maturity date of the loan and instructions regarding repayment are obtained in the manner required by the bank.

- 5.2 Timely repayment is arranged using the appropriate exchange rate mechanism, in line with the client's instructions and standard procedures.

Range : drawing currency under an FEC (forward exchange contract); recovery of funds from a foreign currency account; purchase of forex from treasury; recovery of Rand equivalent from a domestic account. Evidence of competence across the full range is required.

- 5.3 Repayment of the loan is effected for the value date in terms of the facility, exchange control requirements and on the basis of the client's instructions.
- 5.4 Details of the repayment are recorded against the client's credit facility in line with standard procedures.
- 5.5 Revenue related to the loan is recovered and appropriately allocated in line with standard policy and procedure.

Specific Outcome No. 6

Arrange rollover of the loan

Assessment Criteria

- 6.1 Credit approval for refinancing/rollover is obtained in the manner required by the bank.
- 6.2 The refinancing request is checked for compliance with Exchange Control regulations or referred for approval as required by the bank.
- 6.3 Details of the refinancing/rollover requirements are confirmed with the client and recorded in the manner required by the bank.

Range : amount, currency, exchange rate, interest rate/margin, interest amount, settlement arrangements, date and expiry date of the loan. Evidence of competence across the full range is required.
- 6.4 The refinancing/rollover of the loan is arranged through liaison with treasury in the manner required by the bank.
- 6.5 Appropriate additional charges and commissions associated with the rollover are recovered in line with the bank's policy and procedures.

ACCREDITATION PROCESS (INCLUDING MODERATION)

- 1 Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
- 2 Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.
- 3 Moderation of assessment will be overseen by the relevant ETQA according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

Therefore anyone wishing to be assessed against this unit standard may apply to be assessed by any assessment agency, assessor or provider institution which is accredited by the relevant ETQA.

Special Notes**1. Critical Cross - Field Outcome**

- 1.4 The learners is able to evaluate and process a foreign finance loan.
- 1.5 The learner is able to communicate effectively when handling applicable queries.
- 1.6 The learner is able to use technology to process the drawing documents and payments.
- 1.7 The learner is able to understand the relationship between the foreign finance loan and exchange control regulations.

2. Embedded Knowledge

Detailed knowledge of specific banking policy and procedures relating to the task/function performed.

Working knowledge of internal and international payment systems.

Working knowledge of internal controls.

Working knowledge of appropriate SWIFT message formats.

Thorough knowledge of exchange rates and treasury procedures.

Working knowledge of relevant exchange control regulations.

Thorough knowledge of trade finance.

Thorough knowledge of the different types of foreign finance facilities.

Operating and computer systems knowledge sufficient to locate necessary information and complete the task

General understanding of the specific risks, relevant policies and laws relating to foreign exchange transactions.

General understanding of the different types of foreign finance facilities.

General knowledge of the requirements of the Banks Act.

Working knowledge of the Code of Banking Practice.

Title: Process import letters of credit.

Range : sight credit, acceptance credit, deferred payment credit, negotiation credit.

Level: 3 **Version:** 1 **Language:** E
Credits: 18

Issue Date: April 2001
Review Date: April 2004

Field: Business, Commerce and Management Studies
Sub-field: Banking

Purpose: Persons credited with this unit standard will be able to explain rules and regulations related to letters of credit/ amendment, receive an application for a letter of credit/amendment, prepare a letter of credit/amendment for issue, process the documents, deal with discrepant documents and process the payment.

Learning Assumptions: This unit standard should be completed subsequent to proven competence in the unit standards for purchasing and selling foreign instruments and processing inward and outward foreign documentary collections. It is recommended that persons attempting this unit standard have had some experience in processing import letters of credit.

Persons attempting this unit standard must demonstrate competence in the given range of the forms of import letters of credit.

Specific Outcome No.1

Explain rules and regulations related to import letters of credit/amendment.

Assessment Criteria

1.1 The nature of the product is understood and explained according to the specific bank's policy and procedure.

Range: Including but not limited to types of import letters of credit, the nature of the underlying transaction, how the product works, the process for payment, the parties to the transactions and their rights and obligations, terms and conditions, pricing, features and benefits. Evidence of competence across the full range is required.

1.2 The relevant South African legislation affecting import letters of credit is identified and explained in relation to import letters of credit in line with the intention of the legislation, and bank policy and procedure in the manner required by the bank.

Range: Including but not limited to Exchange Control regulations, Bills of Exchange Act. Evidence of competence across the full range is required.

- 1.3 The relevant international regulations and accepted practice governing import letters of credit are understood and explained in the manner required by the bank.

Range : Including but not limited to URR 525, UCP500, INCO terms, ICC opinions, international payment systems, SWIFT messages and format. Evidence of competence across the full range is required.

- 1.4 The risks and risk management processes associated with the import letter of credit are understood and explained in the manner required by the bank.

Range: Including but not limited to risks from the client's and the banks perspective, insurance, exchange rate risk credit risk, risk associated with non-compliance with the terms and conditions of the letter of credit, basic risk management practices associated with import letters of credit Evidence of competence across the full range is required.

- 1.5 The specific banks electronic process for processing import letters of credit is understood and explained.

Range: Including but not limited to access to the system, opening a record, printing records/ reports, making amendments, correcting mistakes, processing and capturing rules and regulations.

Specific Outcome No.2

Receive an application for a letter of credit/amendment.

Assessment Criteria

- 2.1 The client's application for the letter of credit /amendment is processed according to the bank's policies and procedures.

- 2.2.1 The application for the letter of credit/amendment is checked for compliance with Exchange Control regulations or referred for approval as required by the bank.

- 2.3 The application for the letter of credit/amendment is scrutinised for completeness, logical consistency, compliance with UCP 500 and as required by the bank.

Range : Including but not limited to signature confirmation, proof of insurance, check against copy of pro forma invoice, receipt/holding of required indemnity. Evidence of competence across the full range is required

- 2.4 Credit authority is received from the credit department according to standard procedures.

- 2.5 Charges are levied according to the bank's policy.

- 2.6 Liability and exposure entries are prepared as required by the bank.

Specific Outcome No. 3

Prepare the letter of credit for issue.

Assessment Criteria

- 3.1 The correspondent bank to be used as the advising, negotiating, reimbursing and/or confirming bank is allocated according to the bank's policy.
- 3.2 The approved/corrected letter of credit is recorded in line with standard procedures.
- 3.3 The application for the letter of credit is forwarded for authorisation according to standard procedures.
- 3.4 Once authorisation has been received, the reimbursement authorities are drafted and captured according to standard procedures.

Specific Outcome No. 4

Process the drawing documents.

Assessment Criteria

- 4.1 The advice of acceptance or payment is handled according to standard procedures.
- 4.2 The documents from the presenting bank/beneficiary are checked for compliance according to UCP 500 and the bank's policy.
Range : Including but not limited to the terms of the letter of credit, advice of negotiation/payment/acceptance.
- 4.3 Accepted/clean documents are handled in line with standard procedures.
- 4.4 Advice of discrepant documents is processed according to standard procedures.
- 4.5 Discrepancies identified in the documents are dealt with in terms of UCP 500 and the bank's policy and procedures.
- 4.6 The client is contacted for authorisation of discrepancies, and acceptance in writing is awaited according to the bank's policy.
- 4.7 Discrepant documents received and not accepted are processed as required by UCP 500, the bank's policies and procedures and in terms of the letter of credit.
- 4.8 Advice to all parties is prepared according to the terms of the letter of credit, UCP 500

and standard procedures.

Specific Outcome No. 5

Process the payment.

Assessment Criteria

- 5.1 Instructions for the recovery of funds are obtained from the applicant in terms of the letter of credit and according to the bank's procedures.
- 5.2 Preparation for the recovery of funds is arranged timeously in line with the client's instructions and the bank's procedures.

Range : Drawing currency under a forward exchange contract; recovery of funds from the client's foreign currency account; purchase of forex from treasury on the client's behalf; recovery of funds from a Rand account. Evidence of competence across the full range is required.

- 5.3 Charges are calculated and entries prepared in the manner required by the bank.
- 5.4 Adjusted liabilities and exposure entries are prepared as required by the bank.
- 5.5 Advice to all parties is prepared according to the terms of the letter of credit, UCP 500 and standard procedures.

Specific Outcome No. 6

Attend to queries.

Assessment Criteria

- 6.1 The nature of the query received is identified according to the bank's procedures.
- 6.2 Queries are attended to as required by the nature of the query and the bank's procedures.
- 6.3 All queries are handled in a timely manner that promotes customer service.
- 6.4 Administrative tasks related to the query are completed according to the bank's procedures.
- 6.5 Unresolved queries are escalated to the appropriate authority as required by the bank's policy.

ACCREDITATION PROCESS (INCLUDING MODERATION)

- 1 Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
- 2 Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.

- 3 Moderation of assessment will be overseen by the relevant ETQA according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

Therefore anyone wishing to be assessed against this unit standard may apply to be assessed by any assessment agency, assessor or provider institution which is accredited by the relevant ETQA.

Special Notes

1. Critical Cross - Field Outcome

- 1.4 The learner is able to evaluate and process letters of credit.
- 1.5 The learner is able to communicate effectively when handling applicable queries.
- 1.6 The learner is able to use technology to process the drawing documents and payments.
- 1.7 The learner is able to understand the relationship between the letter of credit and exchange control regulations.

2. Embedded Knowledge

Working understanding of types of letters of credit.
Working knowledge of the bank's business allocation policy.
Working knowledge of letter of credit issuing procedures and systems.
Working knowledge of internal and international payment systems.
Working knowledge of the Bills of Exchange Act.
Working knowledge of INCO terms.
Working knowledge of ICC Opinions.
Working knowledge of URR 525.
Working knowledge of UCP 500.
Working knowledge of internal controls.
Working knowledge of SWIFT message formats.
Working knowledge of exchange rates and treasury procedures.
Working knowledge of relevant exchange control regulations.
Working knowledge of trade finance.
Operating and computer systems knowledge sufficient to locate the necessary information and complete the task/function.
General understanding of the specific risks, and relevant policies and laws relating to foreign exchange transactions.

Title: Authorise and release an import letter of credit/amendment.

Range : sight credit, acceptance credit, deferred payment credit, red clause credit, revolving credit, negotiation credit, standby credit.

Level: 4 **Version:** 1 **Language:** E
Credits: 16

Issue Date: April 2001
Review Date: April 2004

Field: Business, Commerce and Management Studies
Sub-field: Banking

Purpose: Persons credited with this unit standard will be able to authorise and release the letter of credit/amendment. Authorise and release payment of drawings and attend to queries.

Learning Assumptions: This unit standard should be completed subsequent to the unit standard for processing import letters of credit. It is recommended that persons attempting this unit standard have had some experience in processing letters of credit prior to being assessed on this unit standard.

Persons attempting this unit standard must demonstrate competence in the given range of the forms of import letters of credit.

Specific Outcome No. 1

Authorise and release the letter of credit/amendment.

Assessment Criteria

1.1 The application for the letter of credit/amendment is received for authorisation and checked for completeness, logical consistency and compliance with UCP 500, URR 525 and according to the bank's policy.

1.2 The application for the letter of credit/amendment is checked for compliance with exchange control regulations and according to standard procedures.

Range: compliance with relevant regulations, insurance, import permit, indemnity, terms of procedures. Evidence of competence across the full range is required.

1.3 The required credit authorisation is checked according to the bank's policy.

1.4 The processing accuracy of the existing input is checked as required by the bank.

1.5 The recovery of revenue associated with the transaction is checked for accuracy and compliance with the bank's policy and procedures and authorised for payment.

- 1.6 Internal control and accounting processes are checked for accuracy, completeness and compliance with standard procedures.

Range : Liabilities and exposure are checked to ensure that they were calculated correctly and accounted for in line with the bank's policy.

- 1.7 The decision is taken that the procedural requirements of the application for the letter of credit/amendment have been met as required by the bank.
- 1.8 Authorisation is given for the release of the letter of credit/amendments/reimbursement authority within limits, or referred for higher authorisation, according to the bank's procedures.

Specific Outcome No. 2

Authorise and release payment of drawings.

Assessment Criteria

- 2.1 The documents from the presenting bank are checked for completeness, compliance with the terms of the letter of credit, each other and advice of negotiation/payment/acceptance/reimbursement according to UCP 500 and the bank's policy.
- 2.2 The arrangement for the payment of the drawing is checked in line with the client's instructions and the bank's procedures.
- Range : Drawing currency under a forward exchange contract; recovery of funds from the client's foreign currency account; purchase of forex from treasury on the client's behalf; recovery of funds from a Rand account. Evidence of completeness across the full range is required.*
- 2.3 The calculation of charges and the preparation of entries are checked in the manner required by the bank and authorised for payment.
- 2.4 The adjustment of liabilities and the preparation of exposure entries are checked as required by the bank.
- 2.5 Advice to all parties is checked according to UCP 500 and standard procedures.
- Range : Details, accuracy, correct format, appropriate parties, compliance with the letter of credit. Evidence of competence across the full range is required.*
- 2.6 The payment of drawings is authorised and released or referred for further authorisation as required by the bank.
- Range : Sight, USANCE drawings.*
- 2.7 The authorisation of funds for transfer is checked in line with the letter of credit and/or re-imbursement instructions.

Specific Outcome No. 3

Attend to queries.

Assessment Criteria

- 3.1 The nature of the query received is identified according to the bank's procedures.
- 3.2 Queries are attended to as required by the nature of the query and the bank's procedures and UCP 500.
- 3.3 All queries are handled in a timely manner that promotes customer service.
Range: Query taken up with the client, foreign bank, other parties to the transaction and an internal departments.
- 3.4 Administrative tasks related to the query are completed according to the bank's procedures.
- 3.5 Unresolved queries are escalated to the appropriate authority as required by the bank's policy.

ACCREDITATION PROCESS (INCLUDING MODERATION)

- 1 Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
- 2 Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.
- 3 Moderation of assessment will be overseen by the relevant ETQA according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

Therefore anyone wishing to be assessed against this unit standard may apply to be assessed by any assessment agency, assessor or provider institution which is accredited by the relevant ETQA.

Special Notes**1.Critical Cross - Field Outcome**

- 1.1 The learner is able to do a credit authorisation on the application.
- 1.4 The learners is able to evaluate and process letter of credit/amendment.
- 1.5 The learner is able to communicate effectively when handling applicable queries.
- 1.7 The learner is able to understand the relationship between letter of credit/amendment and exchange control regulations.

2. Embedded Knowledge

- Thorough understanding of types of letters of credit.
- Thorough knowledge of the bank's business allocation policy.
- Thorough knowledge of letter of credit issuing procedures and systems.
- Working knowledge of the Bills of Exchange Act.
- Thorough knowledge of the INCO terms.
- Thorough knowledge of the URR 525.
- Thorough knowledge of the UCP 500.
- Thorough knowledge and understanding of ICC Opinions.
- Thorough knowledge of SWIFT message formats.
- Thorough knowledge of applicable exchange controls.
- Thorough knowledge of exchange rates and treasury procedures.
- Thorough knowledge of internal and international payment systems.
- Thorough knowledge of internal controls.
- Thorough knowledge of trade finance.
- Operating and computer systems knowledge sufficient to locate the necessary information and complete the task/function.
- Thorough understanding of the specific risks, and relevant policies and laws relating to foreign exchange transactions.

Title: Process export letters of credit.

Range : unconfirmed irrevocable letter of credit, confirmed irrevocable letter of credit, sight credit, acceptance credit, deferred payment credit, red clause credit, revolving credit, negotiation credit, standby credit, transferable credit.

Level:	4	Version: 1	Language: E
Credits:	28		
Issue Date:	April 2001		
Review Date:	April 2004		
Field:	Business, Commerce and Management Studies		
Sub-field:	Banking		
Purpose:	Persons credited with this unit standard will be able to explain rules and regulations related to export letters of credit, advise an export letter of credit, process the drawing documents and deal with any queries.		
Learning Assumptions:	<p>This unit standard should be completed subsequent to the unit standard for processing import letters of credit. It is recommended that persons attempting this unit standard have had some experience in processing export letters of credit prior to being assessed on this unit standard.</p> <p>Persons attempting this unit standard must demonstrate competence in at least four forms of export letters of credit.</p>		

Specific Outcome No.1

Explain rules and regulations related to export letters of credit.

Assessment Criteria

- 1.1** The nature of the product is understood and explained according to the specific bank's policy and procedure.

Range: types of export letters of credit, the nature of the underlying transaction, how the product works, the process for payment, the parties to the transactions and their rights and obligations, terms and conditions, pricing, features and benefits. Evidence of competence across the full range is required.

- 1.2** The relevant South African legislation affecting export letters of credit is identified and explained in line with the intention of the legislation, and bank policy and procedure in the manner required by the bank.

Range: Exchange Control regulations, Bills of Exchange Act. Evidence of competence across the full range is required.

- 1.3 The relevant international regulations and accepted practice governing export letters of credit are understood and explained in the manner required by the bank.

Range : URR 525, UCP500, INCO terms, ICC opinions, international payment systems, SWIFT messages and format. Evidence of competence across the full range is required.

- 1.4 The risks and risk management processes associated with the export letter of credit are understood and explained in the manner required by the bank.

Range: risks from the client's and the banks perspective, country risk, acceptable practice, insurance, payment terms, certain technical risks, exchange rate risk, credit risk, risk associated with non-compliance with the terms and conditions of the letter of credit, basic risk management practices associated with export letters of credit. Evidence of competence across the full range is required.

- 1.5 The specific banks electronic process for processing export letters of credit is understood and explained in the manner required by the bank.

Range: access to the system, opening a record, printing records/ reports, making amendments, correcting mistakes, processing and capturing rules and regulations.

Specific Outcome No.2

Advise an export letter of credit.

Assessment Criteria

- 2.1 The letter of credit is received and recorded according to standard procedures.
- 2.2 The letter of credit is scrutinised for completeness and compliance with UCP 500.
- 2.3 The letter of credit is scrutinised for risk implications based on the terms and conditions of the credit.

Range : country risk, acceptable practice, insurance, payment terms, certain technical risks. Evidence of competence across the full range is required.

- 2.4 Confirmation is arranged on request according to standard procedures.
- 2.5 The beneficiary is advised of the letter of credit and of possible risks and restrictions applicable to export letters of credit in the manner required by the bank.
- 2.6 Entries for charges, liabilities and exposure are prepared as appropriate and according to standard procedures.

Specific Outcome No. 3

Process drawing documents.

Assessment Criteria

- 3.1 Documents presented by the beneficiary are checked for compliance with the letter of credit and according to UCP 500 and are referred for higher authority if required in terms of the bank's policy.
- 3.2 The findings are recorded and the beneficiary is advised as per standard procedures.
- 3.3 Discrepant documents are handled as required by the letter of credit, UCP 500 and the bank's standard procedures.
- 3.4 Clean documents are forwarded in terms of the letter of credit, UCP 500 and standard procedures.
- 3.5 Reimbursement is processed according to the terms of the letter of credit and the bank's policy.
Range : Sight, USANCE and deferred payment drawings. Evidence of competence across the full range is required
- 3.6 Settlement is concluded in line with the client's instructions and the bank's procedures.
- 3.7 Credit authority is obtained for the release of payment prior to the receipt of reimbursement and in line with the bank's policy.
- 3.8 Relevant parties are advised according to UCP 500 and standard procedures.

Specific Outcome No. 3

Attend to queries.

Assessment Criteria

- 4.1 The nature of the query received is identified according to the bank's procedures.
- 4.2 Queries are attended to as required by the nature of the query and the bank's procedures.
- 4.3 All queries are handled in a timely manner that promotes customer service.
- 4.4 Administrative tasks related to the query are completed according to the bank's procedures.

- 4.5 Unresolved queries are escalated to the appropriate authority as required by the bank's policy.

ACCREDITATION PROCESS (INCLUDING MODERATION)

- 1 Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
- 2 Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.
- 3 Moderation of assessment will be overseen by the relevant ETQA according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

Therefore anyone wishing to be assessed against this unit standard may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the relevant ETQA.

Special Notes

1. Critical Cross - Field Outcome

- 1.4 The learner is able to evaluate and process letters of credit.
- 1.5 The learner is able to communicate effectively when handling applicable queries.
- 1.6 The learner is able to use technology to process the drawing documents and payments.
- 1.7 The learner is able to understand the relationship between the letter of credit and exchange control regulations.

2. Embedded Knowledge

Working understanding of types of letters of credit.
Working knowledge of letter of credit issuing procedures and systems.
Working knowledge of internal and international payment system.
Working knowledge of the Bills of Exchange Act.
Working knowledge of INCO terms.
Working knowledge of ICC opinions.
Working knowledge of URR 525.
Working knowledge of UCP 500.
Working knowledge of internal controls.
Working knowledge of SWIFT message formats.
Working knowledge of exchange rates and treasury procedures.
Working knowledge of relevant exchange control regulations.
Working knowledge of trade finance.
Operation and computer system knowledge sufficient to locate the necessary information and complete the task/function.
General understanding of the specific risks, and relevant policies and laws relating to foreign exchange transactions.

Title: Authorise and release forward exchange contracts

Range : Including but not limited to Foreign Exchange Contracts (FEC's), futures and derivatives.

Level: 4 **Version:** 1 **Language:** E
Credits: 12

Issue Date: April 2001
Review Date: April 2004

Field: Business, Commerce and Management Studies
Sub-field: Banking

Purpose: Persons credited with this unit standard will be able to authorise and release the establishment of a forward exchange contract, authorise and release drawings under the contract and attend to queries.

Learning Assumptions: This unit standard should be completed subsequent to the unit standard for processing forward exchange contracts.

Specific Outcome No. 1

Authorise and release an established contract

Assessment Criteria

- 1.1 The completed forward exchange contract is received for authorisation and checked for completeness, logical consistency, compliance with the bank's policy and the client's instructions.
- 1.2 The forward exchange contract is checked for compliance with exchange control regulations and according to standard procedures.
- 1.3 The required credit authorisation is checked according to the bank's policy.
- 1.4 The processing accuracy of the existing input is checked as required by the bank.
- 1.5 The recovery of revenue associated with the transaction is checked for accuracy and compliance with the bank's policy and procedures and authorised for payment.
- 1.6 Internal control and accounting processes are checked for accuracy, completeness and compliance with standard procedures.
- 1.7 The decision is taken that the procedural requirements of the forward exchange contract have been met as required by the bank.
- 1.8 Authorisation is given for the release of the forward exchange contract within limits, or referred for higher authorisation, according to the bank's procedures.

Specific Outcome No. 2

Authorise and release drawings under the contract

Assessment Criteria

- 2.1 The recording of details of drawings is checked for accuracy, completeness and compliance with standard procedure.
- 2.2 The preparation of entries for the disposal of the currency pair is checked for accuracy, completeness and compliance with standard procedures, and authorised for processing.
- 2.3 The drawing under the contract is authorised and released or referred for further authorisation as required by the bank.
- 2.4 The recording of drawings under the contract is checked for accuracy and completeness.
- 2.5 The preparation of early drawings/rollovers/cancellations is checked for compliance with standard procedures and authorised for processing.
- 2.6 The calculation of charges and the preparation of entries are checked in the manner required by the bank and authorised for payment.

Specific Outcome No. 3

Attend to queries

Assessment Criteria

- 3.1 The nature of the query received is identified according to the bank's procedures.
- 3.2 Queries are attended to as required by the nature of the query and the bank's procedures.
- 3.3 All queries are handled in a timely manner that promotes customer service.
- 3.4 Administrative tasks related to the query are completed according to the bank's procedures.
- 3.5 Unresolved queries are escalated to the appropriate authority as required by the bank's policy.

ACCREDITATION PROCESS (INCLUDING MODERATION)

- 1 Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
- 2 Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.
- 3 Moderation of assessment will be overseen by the relevant ETQA according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

Therefore anyone wishing to be assessed against this unit standard may apply to be assessed by any assessment agency, assessor or provider institution which is accredited by the relevant ETQA.

Special Notes

1. Critical Cross - Field Outcome

- 1.4 The learner is able to evaluate and process forward exchange contracts.
- 1.5 The learner is able to communicate effectively when handling applicable queries.
- 1.7 The learner is able to understand the relationship between forward exchange contracts and exchange control regulations.

2. Embedded Knowledge

Detailed knowledge of specific banking policy and procedures relating to the task/function performed.

Thorough knowledge of internal and international payment systems.

Thorough knowledge of internal controls.

Thorough knowledge of appropriate SWIFT message formats.

Thorough knowledge of exchange rates and treasury.

Thorough knowledge of relevant exchange control regulations.

Sound knowledge of the different types of international payment mechanisms

Operating and computer systems knowledge sufficient to locate necessary information and complete the task.

General understanding of the specific risks, relevant policies and laws relating to foreign exchange transactions.

Working understanding of the different types of foreign finance facilities.

Title: Authorise and release foreign finance loans

Range : Import, export and working capital loans.

Level: 5 **Version:** 1 **Language:** E
Credits: 16

Issue Date: April 2001
Review Date: April 2004

Field: Business, Commerce and Management Studies
Sub-field: Banking

Purpose: Persons credited with this unit standard will be able to authorise and release foreign finance facility, authorise and release draw down of funds, sign off the repayment of the loan and attend to queries.

Learning Assumptions: This unit standard should be completed subsequent to the unit standard for processing foreign finance loans.

Specific Outcome No. 1

Authorise and release foreign finance facility

Assessment Criteria

- 1.1 The rules and regulations relating to processing a foreign finance facility are understood and explained according to the bank's policy and procedure.
- 1.2 The processed request for foreign finance facility is received for authorisation and checked for completeness, logical consistency and compliance with the bank's policy.
- 1.3 The foreign finance facility is checked for compliance with exchange control regulations.
- 1.4 The required credit authorisation is checked according to the bank's policy.
- 1.5 The processing accuracy of the existing input is checked as required by the bank.
- 1.6 The recovery of revenue associated with the transaction is checked for accuracy and compliance with the bank's policy and procedures and authorised for payment.
- 1.7 Internal control and accounting processes are checked for accuracy, completeness and compliance with standard procedures.
- 1.8 The decision is taken that the procedural requirements of the foreign finance facility have been met as required by the bank.
- 1.9 Authorisation is given for the release of the foreign finance facility within limits, or

referred for higher authorisation, according to the bank's procedures.

Specific Outcome No. 2

Authorise and release draw down of funds

Assessment Criteria

- 2.1 The processing and confirmation of funds raised is checked for accuracy, completeness, compliance with the client's request and the bank's procedures and policy.
- 2.2 The preparation for the disposal of funds is checked for accuracy in terms of the client's instructions and the bank's procedures.
- 2.3 The calculation of charges and the preparation of entries are checked in the manner required by the bank and authorised for payment.
- 2.4 The draw down of funds is authorised and released or referred for further authorisation as required by the bank.
- 2.5 The recording of the loan details is checked for accuracy and compliance with exchange control requirements and with bank policy and procedure.

Specific Outcome No. 3

Sign off repayment of foreign finance loan

Assessment Criteria

- 3.1 The arrangements for recovery of funds from the client for repayment of the loan are checked for accuracy, completeness, use of appropriate exchange rate mechanism, compliance with the client's instructions and standard procedure.
- 3.2 Details of repayment are checked for accuracy, compliance with exchange control and the client's instructions.
- 3.3 The foreign finance loan is signed off as repaid and the record of repayment is checked for completeness and compliance with standard procedures.
- 3.4 The recovery of revenue associated with the transaction is checked for accuracy and compliance with the bank's policy and procedures and authorised for payment.

Specific Outcome No. 4

Attend to queries

Assessment Criteria

- 4.1 The nature of the query received is identified according to the bank's procedures.
- 4.2 Queries are attended to as required by the nature of the query and the bank's procedures.

- 4.3 All queries are handled in a timely manner that promotes customer service.
- 4.4 Administrative tasks related to the query are completed according to the bank's procedures.
- 4.5 Unresolved queries are escalated to the appropriate authority as required by the bank's policy.

ACCREDITATION PROCESS (INCLUDING MODERATION)

- 1 Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
- 2 Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.
- 3 Moderation of assessment will be overseen by the relevant ETQA according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

Therefore anyone wishing to be assessed against this unit standard may apply to be assessed by any assessment agency, assessor or provider institution which is accredited by the relevant ETQA.

Special Notes

1. Critical Cross - Field Outcome

- 1.4 The learner is able to evaluate and process a foreign finance facility.
- 1.5 The learner is able to communicate effectively when handling applicable queries.
- 1.7 The learner is able to understand the relationship between foreign finance facilities and exchange control regulations.

2. Embedded Knowledge

Detailed knowledge of specific banking policy and procedures relating to the task/function performed.

Working knowledge of internal and international payment systems.

Working knowledge of internal controls.

Working knowledge of appropriate SWIFT message formats.

Thorough knowledge of exchange rates and treasury procedures.

Working knowledge of relevant exchange control regulations.

Thorough knowledge of trade finance.

Thorough knowledge of the different types of foreign finance facilities.

Operating and computer systems knowledge sufficient to locate necessary information and complete the task.

General understanding of the specific risks, relevant policies and laws relating to foreign

exchange transactions.

General understanding of the different types of foreign finance facilities.

General knowledge of the requirements of the Banks Act.

Working knowledge of the Code of Banking Practice.

Title: Consult to clients on trade related issues.

Level:	5	Version:	1	Language:	E
Credits:	20				

Issue Date: April 2001**Review Date:** April 2004**Field:** Business, Commerce and Management Studies**Sub-field:** Banking

Purpose: This unit standard is for those who provide introductory information to business's on trade and related banking services. Persons credited with this unit standard will be able to identify a client's trade requirements, present the trade context, explain trade finance risk and select an appropriate solution.

Learning Assumptions: Persons attempting this unit standard are required to have a thorough understanding of trade related products and services offered by the bank, and a thorough knowledge of economic principles governing international trade. They should have an understanding of the Exchange Control rulings, exchange rate mechanisms and currencies.

Specific Outcome No. 1

Determine trade requirements.

Assessment Criteria

- 1.1** The nature of the business is determined to establish the desirability of the bank's involvement.

Range : financial stability, value of relationship, legality. Evidence of competence across the full range is required

- 1.2** The nature of the business's trade is established in discussion with the client.

Range : type and terms of trade, type of goods, local and international markets, history of trade, countries and trading parties. Evidence of competence across the full range is required

- 1.3** The nature and range of trade finance requirements are explored in discussion with the client.

Range : Cash-flow requirements, convenience, access to funds, currency, auxiliary protection. Evidence of competence across the full range is required

- 1.4** The basis of pricing for products and services is discussed in the manner required by the bank.

- 1.5** The client is dealt with in a polite and professional manner according to the Code of

Banking Practice.

- 1.6 Client contact is recorded promptly and accurately as required by the bank.

Specific Outcome No. 2

Present trade context.

Assessment Criteria

- 2.1 A broad introduction to South Africa's general trade context is presented to the client as required by the bank.
- Range : economic issues, level of imports and exports, trade growth areas, identified opportunities, government incentives. Evidence of competence across the full range is required*
- 2.2 Broad implications of trade agreements with different countries are discussed in terms of their impact on the client's business.
- 2.3 Legal and statutory requirements for participation in the export/import business are explained broadly and the client is directed to further sources of information for more detail.
- 2.4 Key incentives and conditions for participation are introduced in concept and the client is directed to further sources of information for more detail.
- 2.5 Key elements of Exchange Control are presented and explained in terms of their impact on the client's business.
- 2.6 The banks' role and responsibilities in terms of trade finance are presented in the manner required by the bank.

Specific Outcome No. 3

Present financial instruments of trade.

Range : currency-based finance, factoring, documentary collections, guarantees, foreign currency accounts and trade finance products. Evidence of competence across the full range is required

- 3.1 A range of trade product and service options is identified in terms of match with the client's needs.
- 3.2 The trade instruments are broadly introduced and the specific features and benefits of the trade products are explained so that the client can make an informed decision.
- 3.3 The terms and conditions of use of each instrument is explained in a manner that the client should understand.
- 3.4 The risks inherent in each instrument are described and risk management options are presented to the client for consideration.
- 3.5 The relevant Exchange Control regulations relating to each instrument are explained and

the client's responsibilities are outlined.

- 3.6 Pricing on products is presented in the manner required by the bank.

Specific Outcome No. 4

Explain trade finance risk

Assessment Criteria

- 4.1 Trade finance risks relevant to the client's business, and the instruments to be used are identified and presented in a manner the client should understand.
- 4.2 The specific business implications of currency risk are explained in a manner the client should understand.
- 4.3 The risks born by the respective parties to the transaction are presented and means for managing such risks are introduced in concept.
- 4.4 The implications of non-performance on the terms and conditions of international payment instruments are explained in a manner the client should understand.
- 4.5 The implications of the range of risks on the client's specific trade requirements are identified and presented to the client so that they can make an informed decision.
- 4.6 The client's role and responsibility in managing the risks associated with the instruments are outlined in a manner the client should understand.
- 4.7 The bank's role and responsibility in managing the risks is explained as required by the bank and in line with the Banking Code of Practice.
- 4.8 The client's concerns are addressed politely and to the client's satisfaction.

Specific Outcome No. 5

Suggest an appropriate solution.

Assessment Criteria

- 5.1 A suitable product or range of trade products is suggested in line with the business's trade requirements.
- 5.2 The application process and requirements are explained in the manner required by the bank.
- 5.3 Specific documentation required is identified and its relevance explained in the manner required by the bank.
- 5.4 The link to banking facilities and credit are explained to existing clients, or the process of applying for credit facilities is explained in the manner required by the bank.
- 5.5 The client is provided with written documentation outlining services as required by the bank.

ACCREDITATION PROCESS (INCLUDING MODERATION)

- 1 Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.
- 2 Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA.
- 3 Moderation of assessment will be overseen by the relevant ETQA according to the moderation guidelines in the relevant qualification and the agreed ETQA procedures.

Therefore anyone wishing to be assessed against this unit standard may apply to be assessed by any assessment agency, assessor or provider institution which is accredited by the relevant ETQA.

Special Notes**1. Critical Cross - Field Outcome**

- 1.1 The learner is able to match the trade products with the clients needs.
- 1.4 The learner is able to analyse the clients needs and suggest an appropriate solution.
- 1.5 The learner is able to explain various aspects off trade finance risk to the client.
- 1.6 The learner is able to understand the relationship between the clients business and legal/statutory requirements for participation in the import/export markets.

2. Embedded Knowledge

Detailed knowledge of specific banking policy and procedures relating to the task/function performed.

Working knowledge of internal and international payment systems.

Working knowledge of internal controls.

Working knowledge of exchange rates and treasury.

Working knowledge of relevant exchange control regulations.

Sound knowledge of foreign exchange and trade related products.

Thorough knowledge of trade finance.

Operating and computer systems knowledge sufficient to locate necessary information and complete the task.

General understanding of the specific risks, relevant policies and laws relating to foreing exchange transactions.

Understanding of the different types of foreign finance facilities.

Customer service skills.

Presentation skills.

No. 1204

21 November 2001

Established in terms of Act 58 of 1995**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Human Resource Management and Practices

Registered by NSB 03, Business, Commerce and Management Studies, publishes the following unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purposes of the qualifications, and the titles and specific outcomes of the unit standards upon which qualifications are based. The full qualifications and unit standards can be accessed via the SAQA web-site at www.saqa.co.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, 659 Pienaar street, Brooklyn, Pretoria.

Comment on the qualifications and unit standards should reach SAQA at the address ***below and no later than 19 December 2001***. All correspondence should be marked **Standards Setting – SGB for Human Resource Management and Practices** and addressed to

The Director: Standard Setting and Development
SAQA

Attention: Mr. D Mphuthing
Postnet Suite 248
Private Bag X06
Waterkloof
0145
or faxed to 012 – 482 0907

PP **SAMUEL B.A. ISAACS**
EXECUTIVE OFFICER

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**NATIONAL DIPLOMA IN HUMAN RESOURCES MANAGEMENT AND PRACTICES
NQF 5**

Field: Business, Commerce and Management Studies – NSB 03
Sub-field: Human Resources Management and Practices
Level: 5
Credit: 240
Issue date:
Review date:

Rationale of the qualification

Organisations require a reliable indicator that a person is competent to operationalise some aspects of the core processes and practices at a basic level across the four role clusters identified in the field analysis conducted by the SGB for Human Resources Management and Practices:

- strategic planning for human resources management and practices
- acquisition, development and utilisation of people
- establishment and improvement of labour and employee relations
- compensation and administration related to human resources management and practices.

Holding the National Diploma in Human Resources Management and Practices will serve as an indicator to organisations that a person is competent in this regard.

Organisations also need the qualification as a benchmark to gauge the competence of people in the organisation against those of their local and international competitors.

Learners need the qualification to increase their access to employment. It will enable holders to enter learning programmes for a degree in Human Resources Management and Practices with a specialist focus in one or more of the four role clusters.

Providers of education and training in the field need the qualification to facilitate portability of learner credits between provider institutions.

Purpose of the qualification

This diploma will be useful to people who operationalise some aspects of the core processes and practices at a basic level across the four role clusters in human resources management and practices:

- strategic planning for human resources management and practices

- acquisition, development and utilisation of people
- establishment and improvement of labour and employee relations
- compensation and administration related to human resources management and practices.

Holders of the qualification will be able to operationalise some aspects of the core human resources management processes at a basic level and integrate them into an organisation's business processes.

Holding the qualification will enable holders to enter learning programmes for a generalist degree in Human Resources Management and Practices.

Holding this qualification could serve as a requirement for professional registration at associate level.

Access to the Qualification

To meet the requirements described as "Learning assumed to be in place" in section 9 below and in the component unit standards, holders of Further Education and Training Certificate ETC or equivalent qualification will have access to the qualification.

Learning assumed to be in place

It is assumed that learners have communication and mathematical competence at one level below that required for the fundamental components of the qualification.

Exit level Outcomes

Holders of this qualification will be able to:

1. Co-ordinate and contribute to the management of some aspects of all of the four role clusters related to human resources management and practices:
 - provide information for the development of policies
 - participate in the development of procedures for processes related to human resources management and practices in accordance with legislative requirements
 - recruit and induct new employees
 - contribute to the development of employees
 - supervise a work units and manage individual and team performance
 - contribute to the establishment and improvement of labour and employee relations (including contributing to employee assistance and wellness programmes)
 - contribute to the establishment, maintenance and utilisation of an information system related to human resources management and practices (including compensation).
2. Adhere to legislative requirements and organisational policies and procedures when co-ordinating and contributing to the management of some of the core processes related to human resources management and practices, as described in exit level outcome 1 above.
3. Promote best human resources management practices in an organisation
4. Contribute to the monitoring of Health and Safety at the workplace
5. Identify strengths and areas for improvement in own learning through self-reflection and reflection on organisational human resources management and practices.

Associated Assessment Criteria

- Contributions are made in accordance with organizational policies and procedures, client requirements and legal requirements.
- Legislation and organizational policies and procedures relevant to the core processes are correctly identified and appropriately applied to a given situation.
- Best practices relevant to operational responsibilities are correctly identified.
- Appropriate action is planned and implemented to promote best practices in the organization.
- Contributions to the monitoring of health and safety are appropriate to own responsibilities in the organization and in accordance with legislative and organizational requirements
- Strengths and areas for improvement in own learning are correctly identified and adequately evaluated.
- Strengths and areas for improvement in organizational human resources management and practices are correctly evaluated.

International comparability

This qualification and the component unit standards have been compared with similar qualifications from the following countries:

- New Zealand
- Scotland
- Australia.

In addition, the abilities described in the unit standards have also been compared with the findings of the research commissioned by the World Federation of Personnel Management Associations (WFPMA) as contained in the report by Chris Brewster, Elaine Farndale and Jos van Ommeren, **HR Competencies and Professional Standards** (Cranfield University, June 2000).

In general this qualification and its component unit standards compare well with their international counterparts. The only major differences are in formatting and scope of coverage or focus. The qualification found to be the most comparable to this one is Scottish Vocational Qualification (SQV) no. G478 Personnel Support Level 3. The differences in the NVQ and NQF level structures make direct equivalation difficult.

Integrated Assessment

For award of the qualification, a candidate must achieve each unit standard as per item 5 above.

In addition, candidates must demonstrate the ability to engage in a supportive function in an integrative way, as described in the exit level outcomes in item 11 above, dealing with divergent and "random" demands effectively, in accordance with the assessment criteria set for the exit level outcomes above.

Assessors should develop and conduct their own integrates assessment against the exit level, specific and critical outcomes I a manner that takes account of established assessment principles and makes use of a range of formative and summative assessment methods.

Recognition of prior learning

This qualification can be achieved wholly or in part through recognition of prior learning in terms of the criteria laid out.

Evidence can be presented in a variety of forms, including international or previous local qualifications, reports, testimonials mentioning functions performed, work records, portfolios, videos of practice and performance records.

All such evidence should be judged according to the general principles of assessment described in the note to assessors in section 13 above.

Articulation possibilities

This qualification will be able to with other qualifications in the sub-field as well as provide articulation possibilities with a number of other fields, including, ETDP and the humanities. The document "A Framework for Qualifications for Professionals and Practitioners in People Management Processes" explains the relations between these qualifications

Moderation Options

Moderation shall be at the discretion of the relevant ETQA, so long as it complies with SAQA requirements.

Criteria for registration of assessors

Assessors shall have the technical competence to achieve the qualification themselves and must hold a qualification one level above or equivalent, and should demonstrate evaluative ability in relation to the outcomes of the qualification.

Assessment expertise must be evidenced through registered assessor unit standards.

Notes for assessors:

Assessors should keep the following general principles in mind when designing and conducting assessments:

- Focus the assessment activities on gathering evidence in terms of the main outcomes expressed in the titles of the unit standards to ensure assessment is integrated rather than fragmented. Remember we want to declare the person competent in terms of the title. Where assessment at title level is unmanageable, then focus assessment around each specific outcome, or groups of specific outcomes.
- Make sure evidence is gathered across the entire range, wherever it applies. Assessment activities should be as close to the real performance as possible, and where simulations or role-plays are used, there should be supporting evidence to show the candidate is able to perform in the real situation.
- All assessments should be conducted in line with the following well documented principles of assessment: appropriateness, fairness, manageability, integration into work or learning, validity, direct, authentic, sufficient, systematic, open and consistent as defined below:

Principles of assessment:

- *Appropriateness:* The method of assessment is suited to the performance being assessed.
- *Fairness:* The method of assessment does not present any barriers to achievements, which are not related to the evidence.
- *Manageability:* The methods used make for easily arranged, cost-effective assessments that do not unduly interfere with learning.
- *Integration into work or learning:* Evidence collection is integrated into the work or learning process where this is appropriate and feasible.

- *Validity:* The assessment focuses on the requirements laid down in the Standard; i.e. the assessment is fit for purpose.
- *Direct:* The activities in the assessment mirror the conditions of actual performance as closely as possible
- *Authenticity:* The assessor is satisfied that the work being assessed is attributable to the person being assessed.
- *Sufficient:* The evidence collected establishes that all criteria have been met and that performance to the required Standard can be repeated consistently.
- *Systematic:* Planning and recording is sufficiently rigorous to ensure that assessment is fair.
- *Open:* Learners can contribute to the planning and accumulation of evidence. Assessment candidates understand the assessment process and the criteria that apply.
- *Consistent:* The same assessor would make the same judgement again in similar circumstances. The judgement made is similar to the judgement that would be made by other assessors.

At least 10 credits at Level 5 shall be compulsory from the field of Communication Studies and Language, and in addition at least 16 credits shall be compulsory from the sub-field of End-user Computing

	Level 1	Cr	Level 3	Cr	Level 4	Cr	Level 5	Cr	Level 6	Cr	Total
Fundamental							Communication studies and Language	10			
							End-user Computing	16			
								26			26

All unit standards in the core section are compulsory (177 credits)

	Level 1	Cr	Level 3	Cr	Level 4	Cr	Level 5	Cr	Level 6	Cr	Total
Core	Frame and implement an individual action plan to improve productivity within an organisational unit	3	Demonstrate understanding of employment relations in an organisation	3	Supervise work unit to achieve work unit objectives (individual and teams)	12	Measure productivity	14	Conduct an organisational needs analysis	10	
			Represent stakeholder/s in consultations and discussions on matters that arise at shop floor level	3	Manage individual and team performance	8	Recruit and select candidates to fill defined positions	9	Facilitate the resolution of employee grievances	5	
					Induct new employees	6	Develop training materials	12	Conduct a disciplinary hearing	5	
					Plan learning events	10	Facilitate learning using a variety of methodologies	18			
					Manage a skills development course	6	Institute disciplinary action	8			
					Plan and conduct an assessment	15	Monitor and advise on substantive conditions of employment and related rights and obligations in an organisation	5			

	Level 1	Cr	Level 3	Cr	Level 4	Cr	Level 5	Cr	Level 6	Cr	Total
Core					Conduct elementary research in education, training and development or occupation	8	<i>Draft an employment contract</i>	3			
					Occupational developments	4	Manage the capture, storage and retrieval of human resources information using an information system	3			
					Participate in the implementation and utilisation of equity related processes	5					
					Administer data, systems, payments and provide advice related to compensation	5					
		3		6		79		72		20	180

At least 10 credits must be selected from the following list. In addition, the learner must select other unit standards totalling at least 27 credits for the listed electives and/ or from the sub-field Basic Accounting/ Budgeting and/ or General Business Management and/ or End-user Computing in order to achieve a minimum of 240 credits.

	Level 4	Cr	Level 5	Cr	Total
Elective	Evaluate a course	8	Operationalise productivity improvement strategy, objectives and processes	3	
	Facilitate targeted skills development	14	Promote productivity improvement strategy and objectives	13	
			Design and conduct research (ETD)	12	
			Manage a learnership/ learning programme	12	
			<i>Manage individual careers</i>	5	
			<i>Manage the design, development and review of a human resources information system</i>	3	

UNIT STANDARDS IN NATIONAL DIPLOMA IN HUMAN RESOURCES MANAGEMENT AND PRACTICES NQF 5

UNIT STANDARDS ON NQF LEVEL 5

Core

1. **Title:** Recruit and select candidates to fill defined positions
2. **Title:** Institute disciplinary action
3. **Title:** Monitor and advise on substantive conditions of employment and related rights and obligations in an organisation
4. **Title:** Draft an employment contract

Elective

5. **Title:** Manage individual careers
6. **Title:** Manage the design, development and review of a human resources information system

UNIT STANDARDS ON NQF LEVEL 6

Core

7. **Title:** Conduct an organisational needs analysis
8. **Title:** Facilitate the resolution of employee grievances
9. **Title:** Conduct a disciplinary hearing

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL DIPLOMA IN HUMAN RESOURCES MANAGEMENT AND PRACTICES NQF 5

UNIT STANDARDS ON NQF LEVEL 5

1. Title: Recruit and select candidates to fill the defined positions

Specific Outcome 1.1 Plan and prepare for recruitment and selection.

Specific Outcome 1.2 Recruit applicants.

Specific Outcome 1.3 Select staff.

2. Title: Institute disciplinary action

Specific Outcome 2.1 Identify and classify transgression.

Specific Outcome 2.2 Implement procedure to handle non-dismissible offences.

Specific Outcome 2.3 Implement procedure to handle dismissible offences.

Specific Outcome 2.4 Represent employee at disciplinary hearing.

3. Title: Monitor and advise on substantive conditions of employment and related rights and obligations in an organisation

Specific Outcome 3.1 Identify rights and obligations in terms of statutes, contracts and agreements.

Specific Outcome 3.2 Ensure compliance with statutory and other conditions of employment.

Specific Outcome 3.3 Provide advice on the application of substantive conditions.

4. Title: Draft an employment contract

Specific Outcome 4.1 Analyse the conditions of employment within the organisation.

Specific Outcome 4.2 Determine the minimum legal conditions of employment.

Specific Outcome 4.3 Draft an employment contract.

5. Title: Manage individual careers

Specific Outcome 5.1 Gather and analyse information for individual career planning.

Specific Outcome 5.2 Facilitate and manage the career planning process.

Specific Outcome 5.3 Monitor individual career progress.

6. Title: Manage the design, development and review of a human resources information system

Specific Outcome 6.1 Manage the design and development of an information system for human resources management.

Specific Outcome 6.2 Review the information system for human resources management.

Specific Outcome 6.3 Make recommendations for improvements of the information system for human resources management.

UNIT STANDARDS ON NQF LEVEL 6**7. Title: Conduct an organisational needs analysis**

Specific Outcome 7.1 Analyse the current situation.

Specific Outcome 7.2 Determine and describe agreed short and long term organisational objectives.

Specific Outcome 7.3 Define the gap and make recommendations for bridging the gap.

Specific Outcome 7.4 Produce a written report of the results.

8. Title: Facilitate the resolution of employee grievances

Specific Outcome 8.1 Develop structures and procedures to resolve employee grievances.

Specific Outcome 8.2 Implement structures and procedures to resolve employee grievances.

Specific Outcome 8.3 Monitor the application of the grievance procedures and adjust when required.

Specific Outcome 8.4 Evaluate, analyse and address grievance patterns.

9. Title: Conduct a disciplinary hearing

Specific Outcome 9.1 Conduct and manage the hearing.

Specific Outcome 9.2 Implement procedure to handle non-dismissible offences.

Specific Outcome 9.3 Hear pleadings.

Specific Outcome 9.4 Take a decision as to sanction.

Specific Outcome 9.5 Inform employee of and record decisions.

Specific Outcome 9.6 Ensure that proceedings and decisions are recorded.

No. 1205

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

**NATIONAL CERTIFICATE IN HUMAN RESOURCES MANAGEMENT AND PRACTICES
SUPPORT NQF 4**

Field: Business, Commerce and Management Studies – NSB 03
Sub-field: Human Resources Management and Practices
Level: 4
Credit: 120
Issue date:
Review date:

Rationale of the qualification

Organisations require persons who are able to support human resources management processes and practices.

There is also a need for an initial qualification as a possible first leg of a learning progression path in the human resources management and practices field.

Learners need the qualification to increase their access to employment: It will enable persons who are fulfilling some of the support roles in human resources management and practices without formal qualifications to obtain recognition for their competence.

The specified components in the core category will ensure portability across the Human Resources Management and Practices role clusters, whilst the elective category will make provision for specialisation in a specific area.

Purpose of the qualification

This qualification will be useful to people who support and participate in human resources management and practices.

People credited with this qualification are able to:

- support the implementation of processes and systems related to human resources management and practices in one or more of the following role clusters:
 - acquisition, development and utilisation of people
 - establishment and improvement of labour and employee relations
 - compensation and administration related to human resources management and practices

- collect, collate, and distribute information related to people management in line with a given plan
- provide advice on or refer to appropriate person in response to queries on organisation procedures related to people management
- demonstrate basic understanding of people dynamics and impact in the workplace
- demonstrate basic understanding of the functioning of business and the role and contribution of individuals within organisations.

Access to the Qualification

Access to the qualification is open, bearing in mind the learning assumed to be in place.

Learning assumed to be in place

It is assumed that learners have communication and mathematical competence at one level below that required for the fundamental components of the qualification.

Exit level Outcomes

On completion of this qualification, the learner will be able to:

- Perform administrative duties related to human resources management and practices
- Support the implementation of procedures and systems related to human resources management and practices in all of the following role clusters:
 - strategic planning for human resources management and practices
 - acquisition, development and utilisation of people
 - establishment and improvement of labour and employee relations
 - compensation and administration related to human resources management and practices
- Collect, collate, and distribute information related to human resources management and practices in the context of a predetermined plan
- Provide advice on or refer to appropriate person in response to queries on organisation procedures related to human resources management and practices
- Demonstrate basic understanding of people dynamics and impact in the workplace
- Demonstrate basic understanding of the functioning of business and the role and contribution of individuals within organisations
- Identify strengths and areas for improvement in own learning through self-reflection and reflection on support for organisational human resources management and practices.

Associated Assessment Criteria

- Administrative duties are correctly identified and interpreted
- Administrative duties are performed within agreed time frames in accordance with instructions and requirements
- Obstacles to performing administrative duties are identified and appropriate action is taken to remove obstacles oneself or with the help of others.
- A plan to collect and collate relevant information is correctly interpreted and executed according to the requirements of the plan.

- Appropriate decisions are made to provide advice or to refer to someone else in response to queries related to human resources management and practices.
- The principles of interactions between people are correctly explained.
- The impact on the functioning of own organization of positive and negative interactions between people is correctly identified and explained.
- The principles of successful business operations are correctly explained in the context of own organization.
- Categories of roleplayers and their respective contributions to own organization are correctly identified and explained.
- Support for the implementation of human resources management and practices procedures and processes is demonstrated in accordance with best practices and organizational and legal requirements.
- Strengths and areas for improvement in own learning are correctly identified and adequately evaluated.

International comparability

This qualification and the component unit standards have been compared with similar qualifications from the following countries:

- New Zealand
- Scotland
- Australia.

In addition, the abilities described in the unit standards have also been compared with the findings of the research commissioned by the World Federation of Personnel Management Associations (WFPMA) as contained in the report by Chris Brewster, Elaine Farndale and Jos van Ommeren, **HR Competencies and Professional Standards** (Cranfield University, June 2000).

In general this qualification and its component unit standards compare well with their international counterparts. The only major differences are in formatting and scope of coverage or focus. The qualification found to be the most comparable to this one is Scottish Vocational Qualification (SQV) no. G478 Personnel Support Level 3, albeit that SQV Level 3 seems to be more comparable to the South African NQF Level 5 and that the SVQ qualification is consequently at a somewhat higher level. The differences in the NVQ and NQF level structures make direct comparison difficult.

Integrated Assessment

For award of the qualification, a candidate must achieve each unit standard.

In addition, candidates must demonstrate the ability to engage in a supportive function in an integrative way, dealing with divergent and "random" demands effectively, in accordance with the assessment criteria set for the exit level outcomes.

Assessors should develop and conduct their own integrates assessment against the exit level, specific and critical outcomes I a manner that takes account of established assessment principles and makes use of a range of formative and summative assessment methods.

Recognition of prior learning

This qualification can be achieved wholly or in part through recognition of prior learning in terms of the criteria laid out.

Evidence can be presented in a variety of forms, including international or previous local qualifications, reports, testimonials mentioning functions performed, work records, portfolios, videos of practice and performance records.

All such evidence should be judged according to the general principles of assessment described in the *Note for assessors under Criteria for Registration of Assessors* below.

Articulation possibilities

This qualification will be able to articulate with other qualifications in the sub-field once the other qualifications have been registered. The document "A Framework for Qualifications for Professionals and Practitioners in People Management Processes" explains the relations between these qualifications.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the relevant ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the relevant ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the relevant ETQA.

Criteria for registration of assessors

Assessors shall have the technical competence to achieve the qualification themselves and shall have achieved an assessor qualification as required by the relevant ETQA.

Notes for assessors:

Assessors should keep the following general principles in mind when designing and conducting assessments:

- Focus the assessment activities on gathering evidence in terms of the main outcomes expressed in the titles of the unit standards to ensure assessment is integrated rather than fragmented. Remember we want to declare the person competent in terms of the title. Where assessment at title level is unmanageable, then focus assessment around each specific outcome, or groups of specific outcomes.

- Make sure evidence is gathered across the entire range, wherever it applies. Assessment activities should be as close to the real performance as possible, and where simulations or role-plays are used, there should be supporting evidence to show the candidate is able to perform in the real situation.
- All assessments should be conducted in line with the following well documented principles of assessment: appropriateness, fairness, manageability, integration into work or learning, validity, direct, authentic, sufficient, systematic, open and consistent as defined below:

Principles of assessment:

- *Appropriateness:* The method of assessment is suited to the performance being assessed.
- *Fairness:* The method of assessment does not present any barriers to achievements, which are not related to the evidence.
- *Manageability:* The methods used make for easily arranged, cost-effective assessments that do not unduly interfere with learning.
- *Integration into work or learning:* Evidence collection is integrated into the work or learning process where this is appropriate and feasible.
- *Validity:* The assessment focuses on the requirements laid down in the Standard; i.e. the assessment is fit for purpose.
- *Direct:* The activities in the assessment mirror the conditions of actual performance as closely as possible
- *Authenticity:* The assessor is satisfied that the work being assessed is attributable to the person being assessed.
- *Sufficient:* The evidence collected establishes that all criteria have been met and that performance to the required Standard can be repeated consistently.
- *Systematic:* Planning and recording is sufficiently rigorous to ensure that assessment is fair.
- *Open:* Learners can contribute to the planning and accumulation of evidence. Assessment candidates understand the assessment process and the criteria that apply.
- *Consistent:* The same assessor would make the same judgement again in similar circumstances. The judgement made is similar to the judgement that would be made by other assessors.

	Level 1	Cr	Level 2	Cr	Level 3	Cr	Level 4	Cr	Total
Fundamental							Communication studies and Language	20	
							Mathematics	16	
							End-user Computing	2	
									38
Core	Demonstrate a critical understanding of diversity, change and development in societies	4.5	Demonstrate a knowledge of and produce word processing documents using base functions	2	<i>Induct a new employee</i>	4	<i>Recruit and select candidates to fill defined positions</i>	10	
	Demonstrate a critical awareness of the self as a physical, mental, intellectual and social being with particular belief systems.	2			Coach learners	10	<i>Participate in the implementation and utilisation of equity related processes</i>	5	
	Understand human mental and physical development, health and sexuality and their consequences.	2			<i>Demonstrate an understanding of employment relations in an organisation</i>	3			
	Identify and discuss different types of business and their legal implications.	4			<i>Represent stakeholder/s in consultations and discussions on matters that arise at shop floor level</i>	3			
	Demonstrate an understanding of contracts and their sources.	2							
	Demonstrate an understanding of the principles of supply and demand and the concept of production.	2							
	Develop understanding of individual role in an organisation and relate to the world of work.	4							

	Level 1	Cr	Level 2	Cr	Level 3	Cr	Level 4	Cr	Total
Core	Frame and implement an individual action plan to improve productivity within an organisational unit	3							
		23.5		2		20		15	60.5

Elective credits: Unit standards with a total of 151 credits are listed in this category. This makes provision for either a generalist or a specialist qualification. For a generalist qualification, the learner is required to select unit standards totalling at least 24 credits from the list of elective unit standards in order to achieve at least 120 credits.

Learners wishing to specialise in Human Resources Development Support must select unit standards totalling at least 24 credits from the following only:

	Level 4	Cr
Elective	Supervise work unit to achieve work unit objectives	12
	Manage individual and team performance	8
	Prepare learning aids	6
	Advise and refer learners	6
	Plan learning events	10
	Evaluate a course	8
	Manage a skills development course	6
	Plan and conduct assessment of learning	15
	Conduct elementary field research in education, training and development or occupation	8
	Occupational developments	6
	Facilitate targeted skills development	14

Learners wishing to specialise in Compensation Support must achieve the two unit standards totalling 8 credits from the following list and the balance from the list above:

	Level 4	Cr	Level 5	Cr	Total
Elective	Administer data, systems, payments and provide advice related to compensation	5	Manage the capture, storage and retrieval of human resources information using an information system	3	

Learners wishing to specialise in Labour Recruitment Support must select unit standards totalling at least 44 credits from the sub-field of Marketing:

	Level 4	Cr
Elective	Instil in myself a personal marketing culture	4
	Describe features, advantages and benefits of a range of products	6
	Identify customers of the business	4
	Work as a member of a marketing team	4
	Meet marketing performance standards	2
	Take orders from customers to fulfill a need for goods and services	10
	Conduct follow-up with customers to evaluate satisfaction levels	14

**UNIT STANDARDS IN NATIONAL CERTIFICATE IN HUMAN RESOURCES MANAGEMENT AND
PRACTICES SUPPORT NQF 4**

UNIT STANDARDS ON NQF LEVEL 3

Core

1. **Title:** Induct new employees
2. **Title:** Demonstrate an understanding of employment relations in an organisation
3. **Title:** Represent stakeholder/s in consultations and discussions on matters that arise at shop floor level

UNIT STANDARDS ON NQF LEVEL 4

Core

4. **Title:** Recruit and select candidates to fill defined positions
5. **Title:** Participate in the implementation and utilisation of equity related processes

Elective

6. **Title:** Supervise work unit to achieve work unit objectives
7. **Title:** Manage individual and team performance
8. **Title:** Administer data, systems, payments and provide advice related to compensation

UNIT STANDARDS ON NQF LEVEL 5

Elective

9. **Title:** Manage the capture, storage and retrieval of human resources information using an information system

**UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL CERTIFICATE IN HUMAN RESOURCES
MANAGEMENT AND PRACTICES SUPPORT NQF 4**

UNIT STANDARDS ON NQF LEVEL 3

1. Title: Induct a new employee

- Specific Outcome 1.1** Compile induction plan for new entrant/s.
Specific Outcome 1.2 Prepare environment to accommodate new entrant.
Specific Outcome 1.3 Manage general organisational orientation process.
Specific Outcome 1.4 Implement and monitor job specific induction.
Specific Outcome 1.5 Evaluate effectiveness of induction process.

2. Title: Demonstrate an understanding of employment relations in an organisation

- Specific Outcome 2.1** Demonstrate understanding of the various stakeholders and their roles in an organisation
Specific Outcome 2.2 Demonstrate understanding of organisational policies and procedures related to employment.
Specific Outcome 2.3 Demonstrate understanding of employment related agreements.

3. Title: Represent stakeholder/s in consultations and discussions on matters that arise at shop floor level

- Specific Outcome 3.1** Identify issues for discussion, consultation or negotiation.
Specific Outcome 3.2 Prepare to participate in relevant forum.
Specific Outcome 3.3 Represent constituency in relevant forum.
Specific Outcome 3.4 Provide feedback to stakeholder/s.

UNIT STANDARDS ON NQF LEVEL 4

4. Title: Recruit and select candidates to fill defined positions

- Specific Outcome 4.1** Plan and prepare for recruitment and selection.
Specific Outcome 4.2 Recruit applicants.
Specific Outcome 4.3 Select staff.

5. Title: Participate in the implementation and utilisation of equity related processes

- Specific Outcome 5.1** Participate in the development of relevant equity related plans and policies.
Specific Outcome 5.2 Communicate equity related plans and policies to stakeholders.
Specific Outcome 5.3 Participate in the implementation of agreed equity related plans and policies.
Specific Outcome 5.4 Contribute to the monitoring and evaluation of equity related plans and policies.

6. Title: Supervise work unit to achieve work unit objectives

Specific Outcome 6.1 Plan, organise and allocate work.

Specific Outcome 6.2 Manage interpersonal team processes to achieve required outputs.

Specific Outcome 6.3 Evaluate achievement of work unit objectives.

7. Title: Manage individual and team performance

Specific Outcome 7.1 Set performance goals and measures.

Specific Outcome 7.2 Formulate development plans.

Specific Outcome 7.3 Monitor and evaluate performance.

8. Title: Administer data, systems, payments and provide advise related to compensation

Specific Outcome 8.1 Process relevant human resources data.

Specific Outcome 8.2 Effect payments to relevant parties.

Specific Outcome 8.3 Provide advice and support related to compensation.

UNIT STANDARDS ON NQF LEVEL 5

9. Title: Manage the capture, storage and retrieval of human resources information using an information system

Specific Outcome 9.1 Organise the collation of information required for human resources management.

Specific Outcome 9.2 Organise, control and monitor the storing, recording, maintenance and retrieval of collated information related to human resources management.

Specific Outcome 9.3 Advise and inform the organisation by providing human resource information for the use of others.

No. 1206

21 November 2001

**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Project Management

Registered by NSB 03, Business, Commerce and Management Studies, publishes the following unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purposes of the qualifications, and the titles and specific outcomes of the unit standards upon which qualifications are based. The full qualifications and unit standards can be accessed via the SAQA web-site at www.saqqa.co.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, 659 Pienaar street, Brooklyn, Pretoria.

Comment on the qualifications and unit standards should reach SAQA at the address *below and no later than 19 December 2001*. All correspondence should be marked **Standards Setting – SGB for Project Management** and addressed to

The Director: Standard Setting and Development
SAQA
Attention: Mr. D Mphuthing
Postnet Suite 248
Private Bag X06
Waterkloof
0145
or faxed to 012 – 482 0907

PP **SAMUEL B.A. ISAACS**
EXECUTIVE OFFICER

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**National Certificate in Project Management NQF 4**

Field:	Business, Commerce and Management Studies – NSB 03
Sub-field:	Project Management
Level:	4
Credit:	143
Issue date:	
Review date:	

Rationale of the qualification

This qualification reflects the needs of the project management sector, both now and in the future, for a general (not sector specific) skills pool.

This qualification is intended for a Project level that will include working as a leader in the context of a small project / sub-project involving few resources and having a limited impact on stakeholders and the environment or working as a contributing team member on a medium to large project when not a leader. Once having gained this competence they may continue into further project management competence and complexity or into management within an organisation or of their own organisation.

This qualification is intended for those with prior work experience or the NQF3 qualification in project management or an equivalent. The Learners accessing this standard will be working in or with project management teams or using a project approach. These projects may be technical projects, business projects or developmental projects and will cut across a range of economic sectors. This standard will also add value to learners who are running their own business and recognise that project management forms an integral component of any business

The prospective candidate for this qualification may be a person who is entering the work place or has been working in the workplace and has limited formal project management training / competence. Such a person may be working part time or full time with projects. They may be a team member or in a specialised support role such as Project Secretary, Project Administrator, procurement or cost support, planner - estimator support. For the specialist roles there will be a growth in competence gained with experience.

The learners may be from any sector, working in formal business, government, in the community or in rural areas. They may be working as supervisors of small projects or teams on a project, or they may be team members, providing administrative support or specialised procedure support such as procurement.

The qualification gives accessibility and flexibility to the learner and to the employed. The level of flexibility reflects the multiple job roles, organisational requirements and changing technological nature of the industry and at the same time it allows the individual to work towards a nationally recognised qualification.

Purpose of the qualification

The primary purpose of the qualification is to provide learners with:

- A foundation of basic project management skills which can be used to build further project management related competencies
- Competence to be an effective project team member
- Competence to execute small, simple projects
- Competence to provide assistance to a project manager of large projects

Project level will include working as a leader in the context of a small project / sub-project involving few resources and having a limited impact on stakeholders and the environment or working as a contributing team member on a medium to large project when not a leader.

Access to the Qualification

Learners may access this qualification in terms of prior learning experiences, subject to the terms of the model decided upon by the relevant ETQA (which has still to be formed). Learners need familiarity with the English language such as speaking, reading and writing skills, since some of the learning material is not available in any other language. Computer literacy is also an advantage for practitioners and for self-learning opportunities.

Learning assumed to be in place

Learners accessing this qualification will have demonstrated competence against standards in project management practices or equivalent of NQF Level 3.

Exit level Outcomes

On achieving this qualification a learner will be able to:

- Contribute and provide assistance to a project's scope, life cycle activities and the effective execution of the project plan by applying the correct range of project management tools and ensuring project work is carried out according to plan
- Support the implementation of the project plan in response to outcomes evaluated and assessed and provide related inputs to keep the project on track
- Perform administrative duties related to the project and documentation requirements and administer project meetings and workshops
- Contribute to project financial management issues related to cost budgets for an element of work
- Work with and support team project members working on the designated project
- Perform procurement duties related to the project undertaken

- Supervise a project team and implement a range of procedures and systems related to one of the following types of projects; developmental, technical or business

Unit standards will be utilised to provide depth of specification of the outcomes, ranges and the assessment criteria and processes.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The objectives, nature and outcomes of the project are identified and explained
- Project activities are identified, interpreted and applied in accordance with instructions and requirements
- Project progress is monitored, evaluated and corrective actions undertaken to ensure compatibility with plan
- Recommendations for improvement are identified and communicated to relevant parties
- Administrative procedures and processes are identified and explained and performed in accordance with time frames and instructions
- Cost budgets for an element of work are produced and recorded in the required format and within stipulated time frames
- Team building and enhancement principles and processes are explained and applied to individuals and groups within the project
- Procurement procedures and processes are identified and explained and performed in accordance with time frames and instructions
- A project team's performance is monitored, evaluated and problem areas identified and rectified to ensure project completion within scope and requirements

International comparability

Project Management is a discipline with globally recognised best practices and qualifications. This qualification and set of unit standards utilises international and local recognised best practice and standards in project management. The UK level NVQ 3 in Project Management has been referred to in development of the qualification.

This qualification will provide an entry point to further learning for NQF 5 and above qualifications and international qualifications, which are at that higher level.

International institutions that have been referenced include;

- Project Management Institute (Global)
- Association for Project Management (UK)
- International Project Management Association (Europe)
- Australian Institute for Project Management (Australia)

Integrated Assessment

Development of the competencies may be through a combination of informal and formal learning, self-learning, training programmes and work-based application. Providers should conduct diagnostic and formative assessment. Formative, continuous and diagnostic assessments should also take place in the work place. The learner should be able to assess him or herself and determine readiness for a summative assessment against this qualification.

The summative assessment should be undertaken under the direction of the appropriate ETQA.

Recognition of prior learning

Historically project management has been an 'accidental' profession. A large number of practitioners have experience but no formal underpinning knowledge. It is therefore essential to recognise prior learning and the application in the work place. The nature of project management means that competence is developed experientially, therefore the assessment processes will recognise experience versus theoretical knowledge. Portfolios of evidence will be important contributions to the assessment process.

Articulation possibilities

This qualification would be able to articulate with other qualifications in the sub-field, once they are registered as well as other qualifications (to be identified) in the field of Business, commerce and Management Studies

Moderation Options

The summative assessment will be directed through an ETQA. Professional Institutes, locally and internationally can also act as independent referees. Local institutes include PMISA and CEASA. Both have been active in the development of standards and qualifications and have strong working relations with the leading international project management institutes.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 4	Cr	Total
Fundamental	Communication studies	20	
	Physical, mathematical, computer and life sciences	16	
			36
Core	Contribute to project initiation, scope definition and scope change control	8	
	Identify, organise and co-ordinate project life cycle phases for control purposes	5	
	Scheduling project activities to facilitate effective project execution	8	
	Estimate and prepare cost budgets for an element of work and monitor and control actual cost against budget	6	
	Work as a project team member	8	
	Plan, organise and support project meetings and workshops	4	
	Conduct project documentation management to support project processes	6	
	Implement project administration processes according to requirements	5	
	Apply a range of management tools	8	
	Contribute to the management of project risk within own technical expertise	5	
	Fulfil procurement activities and supervise procurement administration	8	
	Monitor, evaluate and communicate project schedules	5	
	Provide assistance in implementing and assuring project work is conducted in accordance with project quality plan	6	
	Identify, suggest and implement corrective actions to improve quality	6	
	Evaluate and improve the project team's performance	5	
			93
Elective	Supervise a project team of a developmental project to deliver project objectives	14	
	Supervise a project team of a technical project to deliver project objectives	14	
	Supervise a project team of a business project to deliver project objectives	14	
	Support the project environment and activities to deliver project objectives	14	
			14

UNIT STANDARDS IN NATIONAL CERTIFICATE IN PROJECT MANAGEMENT NQF 4**UNIT STANDARDS ON NQF LEVEL 4****Core**

1. **Title:** Contribute to project initiation, scope definition and scope change control
2. **Title:** Identify, organise and co-ordinate project life cycle phases for control purposes
3. **Title:** Scheduling project activities to facilitate effective project execution
4. **Title:** Estimate and prepare cost budgets for an element of work and monitor and control actual cost against budget
5. **Title:** Work as a project team member
6. **Title:** Plan, organise and support project meetings and workshops
7. **Title:** Conduct project documentation management to support project processes
8. **Title:** Implement project administration processes according to requirements
9. **Title:** Apply a range of management tools
10. **Title:** Contribute to the management of project risk within own technical expertise
11. **Title:** Fulfil procurement activities and supervise procurement administration
12. **Title:** Monitor, evaluate and communicate project schedules
13. **Title:** Provide assistance in implementing and assuring project work is conducted in accordance with project quality plan
14. **Title:** Identify, suggest and implement corrective actions to improve quality
15. **Title:** Evaluate and improve the project team's performance

Elective

16. **Title:** Supervise a project team of a developmental project to deliver project objectives
17. **Title:** Supervise a project team of a technical project to deliver project objectives
18. **Title:** Supervise a project team of a business project to deliver project objectives
19. **Title:** Support the project environment and activities to deliver project objectives

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL CERTIFICATE IN PROJECT MANAGEMENT NQF 4

UNIT STANDARDS ON NQF LEVEL 4

1. Title: Contribute to a project initiation, scope definition and scope change control

Specific Outcome 1.1 Contribute to the identification, description and analysis of the project needs, expectations, constraints, assumptions, exclusions, inclusions and deliverables

Specific Outcome 1.2 Contribute to preparing and producing inputs to be used for further planning activities

Specific Outcome 1.3 Monitor the achievement of the project scope

2. Title: Identify, organise and co-ordinate project life cycle phases for control purposes

Specific Outcome 2.1 Discuss and explain the nature of the project

Specific Outcome 2.2 Identify the processes and sub-processes and select sub-processes

Specific Outcome 2.3 Co-ordinate the project processes and sub-processes over the various life cycle phases

3. Title: Schedule project activities to facilitate effective project execution

Specific Outcome 3.1 Identify, explain and describe the purpose and process of scheduling

Specific Outcome 3.2 Define and gather project activities from technical experts and within area of technical expertise

Specific Outcome 3.3 Sequence activities and estimate duration

Specific Outcome 3.4 Develop a project schedule

4. Title: Estimate and prepare cost budgets for an element of work and monitor and control actual cost against budget

Specific Outcome 4.1 Identify elements and resources to be costed through interpreting the project scope statement, work breakdown structure and other project data

Specific Outcome 4.2 Prepare and produce a cost budget

Specific Outcome 4.3 Contribute to the monitoring and controlling of cost budget performance by maintaining records and communicating

5. Title: Work as a project team member

Specific Outcome 5.1 Demonstrate an understanding of criteria for working as a member of a team

Specific Outcome 5.2 Work autonomously and collaborate with other team members

Specific Outcome 5.3 Contribute to building relations between team members and stakeholders

Specific Outcome 5.4 Make a positive contribution to team coherence, image and spirit

Specific Outcome 5.5 Respect personal, ethical, religious and cultural differences to enhance interaction between team members

6. Title: Plan, organise and support project meetings and workshops

Specific Outcome 6.1 Explain the purpose, objective and scope of project meetings and/ or workshops

Specific Outcome 6.2 Plan for a project meeting/ workshop

Specific Outcome 6.3 Arrange and support a project meeting and/ or workshop

7. Title: Conduct project documentation management to support project processes

Specific Outcome 7.1 Use a paper based and/ or electronic filing system for a project

Specific Outcome 7.2 Use standards for identifying, securing and finding documentation

Specific Outcome 7.3 Prepare and provide project templates to team members

Specific Outcome 7.4 Prepare project documents for hand-over at the end of a project

Specific Outcome 7.5 Describe and explain project documentation management process

8. Title: Implement project administration processes according to requirements

Specific Outcome 8.1 Implement processes and standards to support project change control and configuration management

Specific Outcome 8.2 Update and communicate status of change requests

Specific Outcome 8.3 Administer the project library/ repository to support change to affected items

Specific Outcome 8.4 Maintain project organisational information

9. Title: Apply a range of project management tools

Specific Outcome 9.1 Demonstrate an understanding of project management tools

Specific Outcome 9.2 Use a range of project management tools

10. Title: Contribute to the management of project risk within own technical expertise

Specific Outcome 10.1 Identify and recognise potential risks that could affect project performance

Specific Outcome 10.2 Contribute to the assessment of the impact and likelihood of identified risks

Specific Outcome 10.3 Contribute to the development of risk management statements and plans

Specific Outcome 10.4 Monitor and control the project risks

11. Title: Fulfil procurement activities and supervise procurement administration

Specific Outcome 11.1 Compile and process procurement requests to required standards and needs

Specific Outcome 11.2 Source suppliers to meet procurement requirements

Specific Outcome 11.3 Receive and evaluate proposals and make supplier recommendations

Specific Outcome 11.4 Supervise procurement administration

Specific Outcome 11.5 Monitor supplier performance and build supplier relations

12. Title: Monitor, evaluate and communicate project schedules

- Specific Outcome 12.1** Identify and co-ordinate stakeholders, their roles, needs and expectations
- Specific Outcome 12.2** Describe and explain a range of project schedule control procedures and techniques
- Specific Outcome 12.3** Monitor and evaluate actual project work versus plan (baseline)
- Specific Outcome 12.4** Record and communicate schedule changes

13. Title: Provide assistance in implementing and assuring project work is conducted in accordance with project quality plan

- Specific Outcome 13.1** Discuss and explain need for process and standards to achieve quality
- Specific Outcome 13.2** Contribute to quality planning
- Specific Outcome 13.3** Monitor and evaluate the project quality plan's implementation
- Specific Outcome 13.4** Record quality deviations and expectations against project quality plan
- Specific Outcome 13.5** Prepare and distribute quality deviation reports
- Specific Outcome 13.6** Communicate and maintain central record of standards and procedures to be met on a project

14. Title: Identify, suggest and implement corrective actions to improve quality

- Specific Outcome 14.1** Identify and suggest corrective actions for improvement to project work
- Specific Outcome 14.2** Disseminate for corrective actions to appropriate individuals
- Specific Outcome 14.3** Implement corrective actions to improve quality of project work

15. Title: Evaluate and improve the project team's performance

- Specific Outcome 15.1** Explain and use a given team performance reference framework (performance monitoring)
- Specific Outcome 15.2** Evaluate team performance using the given team performance framework
- Specific Outcome 15.3** Provide assessment of individuals and teams on an ongoing basis to agreed timeframes
- Specific Outcome 15.4** Facilitate team performance improvement using assessment findings

Electives**16. Title: Supervise a project team of a development project to deliver project objectives**

- Specific Outcome 16.1** Discuss and explain the appropriateness of the various organisational structures
- Specific Outcome 16.2** Supervise and monitor a developmental project team
- Specific Outcome 16.3** Report progress on a developmental project
- Specific Outcome 16.4** Identify and rectify problems occurring in a developmental project
- Specific Outcome 16.5** Set up, run and close a developmental project

17. Title: Supervise a project team of a technical project to deliver project objectives

Specific Outcome 17.1 Discuss and explain the appropriateness of the various organisational structures

Specific Outcome 17.2 Monitor a technical project team

Specific Outcome 17.3 Report progress on a technical project

Specific Outcome 17.4 Identify and rectify problems occurring in a technical project

Specific Outcome 17.5 Set up, run and close a technical project

18. Title: Supervise a project team of a business project to deliver project objectives

Specific Outcome 18.1 Discuss and explain the appropriateness of the various organisational structures

Specific Outcome 18.2 Monitor a business project team

Specific Outcome 18.3 Report progress on a business project

Specific Outcome 18.4 Identify and rectify problems occurring in a business project

Specific Outcome 18.5 Set up, run and close a business project

19. Title: Support the project environment and activities to deliver project objectives

Specific Outcome 19.1 Discuss and explain the appropriateness of the various organisational structures

Specific Outcome 19.2 Identify project types and nature and guiding on appropriate project strategies and tactics

Specific Outcome 19.3 Suggest appropriate structures, methods and processes to projects

Specific Outcome 19.4 Check and verify that a project environment is established

Specific Outcome 19.5 Evaluate and consolidate from project experiences and update standard structures and processes

No. 1207

21 November 2001

**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Marketing

Registered by NSB 03, Business, Commerce and Management Studies, publishes the following unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purposes of the qualifications, and the titles and specific outcomes of the unit standards upon which qualifications are based. The full qualifications and unit standards can be accessed via the SAQA web-site at www.saqa.co.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, 659 Pienaar street, Brooklyn, Pretoria.

Comment on the qualifications and unit standards should reach SAQA at the address ***below and no later than 19 December 2001***. All correspondence should be marked **Standards Setting – SGB for Marketing** and addressed to

The Director: Standard Setting and Development
SAQA
Attention: Mr. D Mphuthing
Postnet Suite 248
Private Bag X06
Waterkloof
0145
or faxed to 012 – 482 0907


SAMUEL B.A. ISAACS
EXECUTIVE OFFICER

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**NATIONAL CERTIFICATE IN MARKETING RESEARCH NQF LEVEL 4**

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	4
Credit:	134
Issue date:	31 August 2001
Review date:	01 September 2003

Rationale of the qualification

The National Qualification in Marketing Research: Level 4 is designed to meet the needs of those learners who enter the field of Marketing Research. The whole marketing field per se is a key business function necessary for the success of any organisation, both strategically and operationally. The qualification is inextricably linked to the Standard Generating Body's (SGB's), definition of Marketing, "to identify, anticipate and satisfy current and future consumer and customer expectations, needs and problems by facilitating and consummating exchange to achieve targeted levels of profitability and / or value in an accountable and socially responsible manner. The Marketing Research National Certificate at NQF Level 4 will provide a broad knowledge and skills needed in the industry and to progress along a career path for learners who

- Were previously disadvantaged or who were unable to complete their schooling and were therefore denied access to Further Education and Training.
- Have worked in Marketing Research for many years, but have no formal qualification in Marketing Research.
- Wish to extend their range of skills and knowledge of the industry so that they can become knowledge workers in Marketing Research.

The National Certificate in Marketing Research: Level 4 allows the learner to work towards a nationally recognised whole qualification. The qualification will allow both those in formal educations and those already employed in marketing organisations access, due to its flexibility. It aims to develop individuals who are informed and skilled in Marketing Research.

The qualification has building blocks that can be developed further and will lead to a more defined Marketing Research career path at NQF Level 5. It also focuses on the skills, knowledge, values and attitudes required to progress further. The intention is

- To promote the development of knowledge and skills that are required in all sub-sectors of marketing.
- To release the potential of people.
- To provide opportunities for people to move up the value chain.

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- | | |
|------------------------|---------------------------|
| • Field Interviewers | • Field Managers |
| • Research Workers | • Research Academics |
| • Research Executives | • Research Managers |
| • Research Supervisors | • Research Clerks |
| • Research Directors | • Research Administrators |
| • Research Agents | |

The National Certificate in Marketing Research: Level 4 should produce knowledgeable, skilled Market Researchers who are able to contribute to improved productivity and efficiency within the marketing industry. It should provide the means for current individuals in the Marketing Research field to receive recognition of prior learning and to upgrade their skills and knowledge base. The qualification is structured in such a way that exposes individuals to a set of core competences to give a broad understanding of marketing and the electives, which will allow for a specific competence in Marketing Research. It will also promote the notion of life-long learning.

Purpose of the qualification

Any individuals who are or wish to be involved in Marketing Research will access this qualification. It also serves as the entry qualification into Marketing Research Qualifications in the higher band of learning. This qualification will be registered at NQF Level 4. This qualification is also related to other qualifications such as the National Certificate in Marketing Communications, the National Certificate in Customer Management and the National Certificate in Marketing Management where all four of these qualifications will share fundamental competence as well as core competence. Portability across all four of these National Certificates is therefore ensured.

Access to the Qualification

As this is a "complete and whole" qualification, any learner who can provide guidance of the learning assumed to be in place, has open access to this qualification.

Learning assumed to be in place

Learners accessing this qualification will have demonstrated competence in communicating verbally and in writing and computer technology at Level 3 on the NQF or equivalent.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Work with other members of a marketing team to meet performance standards and objectives.
- Identify, assess, utilize and account for marketing expertise and resources in order to meet marketing objectives and report on results.
- Identify prospective customers and their needs and present the correct features, advantages and benefits to enable customers to make informed buying decisions.
- Demonstrate an understanding of product positioning, product life cycles, market segmentation, marketing mix and the competitive environment for products and services.
- Demonstrate an understanding for and comply with legislation, rules, activities and transactions.
- Identify and evaluate brand product and service promotional opportunities and co-ordinate and evaluate promotional activities and results.
- Comply with organisational ethics by applying marketing principles, concepts and culture through the identification of all stakeholders and their relationships.
- Liaise with a range of customers and identifying and solving customers complaints and problems.
- Identify, monitor and review marketing information and gather and process data for research and information purposes.
- Follow sampling requirements, attend briefings and meet research deadlines.
- Record, edit, code and capture marketing research data.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The importance of working together and communicating with all stakeholders in order to meet marketing requirements and objectives.
- Giving identified customers the correct information (features, advantages and benefits) to enable them to make informed buying decisions.
- The legal and ethical requirements in the marketing field.
- Product positioning, target markets and the competitive environment.
- Promotions which deal with either brand, product or service.
- The importance of knowing the internal and external stakeholders and believing in marketing as a profession.
- The methods, techniques and principles of dealing with customers and clients to meet their needs.
- Being able to source expertise and resources to assist with information gathering and processing.
- The correct selection of Marketing Research respondents.
- Using instructions and information to meet Marketing Research requirements.
- How to process research data to produce accurate research information.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this marketing research qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Marketing Research industry, learners may also be able to enter careers in

- General Marketing
- Customer Services
- Data Base Marketing
- Direct Marketing
- Direct Selling
- Marketing Consultancy
- Marketing Management

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector eg. EMCG; Retail, Wholesale, Motor, Insurance etc
3. Learners can also become even more specialised such as Call Center, Internet Marketing, Point of Sale etc

A learner could follow a career in the Marketing Research field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 4	Cr	Total
Fundamental	Communicate verbally and in writing to a range of stakeholders	20	20
	Work with a range of software packages to generate, maintain and manipulate data	20	20
			40
Core	Work as a member of a marketing team	5	5
	Meet marketing performance standards	4	4
	Identify and utilise marketing resources to meet objectives	4	4
	Describe features, advantages and benefits of a range of products	6	6
	Identify customers of the business	4	4
	Demonstrate an understanding of product positioning	4	4
	Comply with legal requirements and understand implications	4	4
	Deal with brand, product and service promotions	4	4
	Demonstrate an understanding of the target market	4	4
	Demonstrate an understanding of the competitive environment	4	4
	Instill in myself a personal marketing culture	4	4
	Comply with organisational ethics	4	4
	Identify internal and external stakeholders	4	4
	Liaise with a range of customers of a business	4	4
	Handle a range of customer complaints	4	4
	Identify expertise and resources	3	3
	Monitor marketing information flow and collect and process marketing data	4	4
			70
Elective	Follow Sampling Requirements	9	9
	Attend briefing and return work on deadline	7	7
	Record raw data	3	3
	Edit, code, and capture data	5	5
			24

UNIT STANDARDS IN NATIONAL CERTIFICATE IN MARKETING RESEARCH NQF LEVEL 4**UNIT STANDARDS ON NQF LEVEL 4****Core**

- | | | |
|-----|-------|---|
| 1. | Title | Work as a member of a marketing team |
| 2. | Title | Meet marketing performance standards |
| 3. | Title | Identify and utilise marketing resources to meet objectives |
| 4. | Title | Describe features, advantages and benefits of a range of products |
| 5. | Title | Identify customers of the business |
| 6. | Title | Demonstrate an understanding of product positioning |
| 7. | Title | Comply with legal requirements and understand implications |
| 8. | Title | Deal with brand, product and service promotions |
| 9. | Title | Demonstrate an understanding of the target market |
| 10. | Title | Demonstrate an understanding of the competitive environment |
| 11. | Title | Instill in myself a personal marketing culture |
| 12. | Title | Comply with organisational ethics |
| 13. | Title | Identify internal and external stakeholders |
| 14. | Title | Liaise with a range of customers of a business |
| 15. | Title | Handle a range of customer complaints |
| 16. | Title | Identify expertise and resources |
| 17. | Title | Monitor marketing information flow and collect and process marketing data |

Elective

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|-----|-------|---|
| 18. | Title | Follow Sampling Requirements |
| 19. | Title | Attend briefing and return work on deadline |
| 20. | Title | Record raw data |
| 21. | Title | Edit, code, and capture data |

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL CERTIFICATE IN MARKETING RESEARCH NQF LEVEL 4**UNIT STANDARDS ON NQF LEVEL 4**

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|------------------|-------|--|
| 1. | Title | Work as a member of a marketing team |
| Specific Outcome | 1.1 | Communicate with all relevant stakeholders to enhance teamwork |
| Specific Outcome | 1.2 | Report on team progress to appropriate authority and team |
| Specific Outcome | 1.3 | Display tendencies to work with others as a member of a marketing team |
| Specific Outcome | 1.4 | Handle and resolve areas of conflict |
| 2. | Title | Meet marketing performance standards |
| Specific Outcome | 2.1 | Demonstrate an understanding of marketing performance standards |
| Specific Outcome | 2.2 | Follow instructions to meet standards |
| Specific Outcome | 2.3 | Meet marketing objectives |
| Specific Outcome | 2.4 | Report on marketing objectives progress |

3.	Title	Identify and utilise marketing resources to meet objectives
Specific Outcome	3.1	Identify and assess marketing resources required
Specific Outcome	3.2	Utilise marketing resources to meet objectives
Specific Outcome	3.3	Account for marketing resources
4.	Title	Describe features, advantages and benefits of a range of products
Specific Outcome	4.1	Determine and communicate product features, advantages and benefits
Specific Outcome	4.2	Describe physical specifications, features, advantages and benefits
5.	Title	Identify customers of the business
Specific Outcome	5.1	Identify prospective customers and establish their needs
Specific Outcome	5.2	Establish and build the customer base
6.	Title	Demonstrate an understanding of product positioning
Specific Outcome	6.1	Describe and explain product positioning strategies
Specific Outcome	6.2	Position the product in relation to the market
Specific Outcome	6.3	Explain and describe product life cycles
7.	Title	Comply with legal requirements and understand implications
Specific Outcome	7.1	Use and interpret legal documentation to ensure compliance with legal and organisational requirements
Specific Outcome	7.2	Comply with legislation and rules which regulate the conduct in a marketing business
Specific Outcome	7.3	Apply the various aspects of marketing law and statutory requirements applicable to marketing transactions
8.	Title	Deal with brand, product, and service promotions
Specific Outcome	8.1	Evaluate brand, product and service promotion opportunities
Specific Outcome	8.2	Co-ordinate brand, product and sales promotions
Specific Outcome	8.3	Evaluate brand, product and service promotions
9.	Title	Demonstrate an understanding of the target market
Specific Outcome	9.1	Describe market segmentation and market segmentation processes
Specific Outcome	9.2	Explain positioning strategies for chosen segments
Specific Outcome	9.3	Explain market segmentation in relation to the marketing mix

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| 10. | Title | Demonstrate an understanding of the competitive environment |
| Specific Outcome | 10.1 | Explain the nature and the extent of the competitive environment |
| Specific Outcome | 10.2 | Retain the competitive environment of products or services |
| 11. | Title | Instill in myself a personal marketing culture |
| Specific Outcome | 11.1 | Identify and define what marketing is |
| Specific Outcome | 11.2 | Identify marketing principles and concepts |
| Specific Outcome | 11.3 | Identify the benefits of instilling in self a marketing culture |
| Specific outcome | 11.4 | Persuade others of the benefits of a marketing culture |
| 12. | Title | Instill in myself a personal marketing culture |
| Specific Outcome | 12.1 | Describe the code of conduct and ethical issues |
| Specific Outcome | 12.2 | Adhere to code of conduct |
| Specific Outcome | 12.3 | Identify and understand the ethical issues in the organisation |
| 13. | Title | Identify internal and external stakeholders |
| Specific Outcome | 13.1 | Identify internal and external stakeholders |
| Specific Outcome | 13.2 | Describe the stakeholders' relationship to each other |
| Specific Outcome | 13.3 | Initiate contact with a range of customers |
| 14. | Title | Liaise with a range of customers of a business |
| Specific Outcome | 14.1 | Initiate contact with a range of customers |
| Specific Outcome | 14.2 | Maintain contact with a range of customers |
| Specific Outcome | 14.3 | Administer contact with a range of customers |
| 15. | Title | Handle a range of customer complaints |
| Specific Outcome | 15.1 | Identify the customers problem |
| Specific Outcome | 15.2 | Commit to solving the customer's problem |
| Specific Outcome | 15.3 | Arrange correct planning and solution to the customer's problem |
| Specific Outcome | 15.4 | Communicate with all stakeholders |
| Specific Outcome | 15.5 | Provide Practical business solutions |
| 16. | Title | Identify expertise and resources |
| Specific Outcome | 16.1 | Determine criteria for expertise and resources |
| Specific Outcome | 16.2 | Establish and record expertise and resources |
| Specific Outcome | 16.3 | Report on expertise and resources |

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|-----|------------------|------|---|
| 17. | Title | | Monitor marketing information flow and collect and process marketing data |
| | Specific Outcome | 17.1 | Identify marketing information flow needs |
| | Specific Outcome | 17.2 | Monitor and review marketing information flow |
| | Specific Outcome | 17.3 | Gather data for researching and information purposes |
| | Specific Outcome | 17.4 | Process data for researching information purposes |
| 18. | Title | | Follow sampling requirements |
| | Specific Outcome | 18.1 | Select respondents according to quota requirements |
| | Specific Outcome | 18.2 | Select respondents according to probability sampling principles |
| | Specific Outcome | 18.3 | Conduct a census |
| 19. | Title | | Attend briefing and return work on deadline |
| | Specific outcome | 19.1 | Meet and adhere to deadlines |
| | Specific Outcome | 19.2 | Attend briefing |
| | Specific Outcome | 19.3 | Return work to recent parties |
| 20. | Title | | Record raw data |
| | Specific Outcome | 20.1 | Conduct interviews and de-briefing according to requirements |
| | Specific Outcome | 20.2 | Submit correct questionnaire |
| | Specific Outcome | 20.3 | Transcribe qualitative information |
| 21. | Title | | Edit, code and capture data |
| | Specific Outcome | 21.1 | Extract open-ended responses |
| | Specific Outcome | 21.2 | Code correctly, neatly and accurately |
| | Specific outcome | 21.3 | Edit accurately |
| | Specific Outcome | 21.4 | Capture data |

No. 1208

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**NATIONAL DIPLOMA IN MARKETING RESEARCH NQF LEVEL 5**

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	5
Credit:	243
Issue date:	31 August 2001
Review date:	01 September 2003

Rationale of the qualification

The National Diploma in Marketing Research: Level 5 is designed to meet the needs of those learners who are already involved in the field of Marketing Research or who enter the field at a higher level. Learners recognise that marketing is an essential and key business function necessary for the success of any organisation, both strategically and operationally. The qualification is inextricably linked to the Standard Generating Body's (SGB's), definition of Marketing, "to identify, anticipate and satisfy current and future consumer and customer expectations, needs and problems by facilitating and consummating exchange to achieve targeted levels of profitability and / or value in an accountable and socially responsible manner.

This qualification also reflects the needs of the marketing sector both now and in the future: it gives accessibility and flexibility to the learner and to the employer. The level of flexibility is reflected in the multiple job roles and careers, organisational requirements and changing technological nature of marketing and at the same time it allows the individual to work towards a nationally recognised qualification

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Field Interviewers
- Research Workers
- Research Executives
- Research Supervisors
- Research Directors
- Research Agents
- Field Managers
- Research Academics
- Research Managers
- Research Clerks
- Research Administrators

The National Diploma in Marketing Research is structured in such a way that it exposes learners to a broad set of core competences while the electives allow for special competence in Marketing Research. It certainly promotes the notion of life-long learning.

Purpose of the qualification

Learners acquiring this qualification will have demonstrated competence at NQF Level 4 in the area of Marketing Research or will have attained an equivalent qualification at that level. This qualification will be registered at NQF Level 5 on the National Qualifications Framework and learners will have acquired a range of fundamental, core and elective competence around the areas of Marketing Strategy, Marketing Customer Relations, Principles of Marketing, Marketing Communications, Marketing Management, Marketing Research and Customer Management. Learners will have also demonstrated competence against specialised outcomes in the area of Marketing Research

Access to the Qualification

As this is a unit standard based qualification, any learner who is competent in the unit standard as required by the core, fundamental and elective components stipulated in the qualification, will have free access to the qualification.

Learning assumed to be in place

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.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Conduct a marketing situational analysis while leading a team of Marketers and Service Providers.
- Develop, implement and manage a marketing related project and / or activity plan, and implement a generic marketing communications strategy.
- Present the features, advantages and benefits of products to customers so that a deal can be closed.
- Provide product training to others in the organisation and coach others on the principles of marketing in an organisation.
- Identify brand mix elements and financial implications for decision making.

- Integrate marketing plans with the business process.
- Monitor and control the handling of customers, customer needs and requirements and areas of customer service impact.
- Analyse and interpret marketing information and present marketing data to stakeholders.
- Design and test samples of measuring instruments to meet objectives.
- Develop and write editing, coding and data processing and data analysis instructions.
- Plan, organize and control field staff and field work to meet the required objectives.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- Data gathering processes, its analysis and the drawing of conclusions and making recommendations.
- How to get the best results from a team of marketers or service providers by monitoring and rectifying performance.
- Project plans and their successful conclusion.
- Communications models and strategies and the elements and processes.
- Customer needs and their identification to enable the production and demonstration of features, advantages and benefits.
- Training and coaching environment establishment and implementation.
- Product and service selling methods, techniques and principles.
- Brand influences and familiarity factors.
- Financial statement analysis and evaluation.
- Marketing activities and the issues, roles and characteristics that affect them.
- Customer service providers and their interaction to establish satisfied customers by interpreting and meeting customer needs and all areas that impact on customer service levels.
- Marketing data, its analysis; interpretation and presentation to all stakeholders.
- Sampling methods and techniques and the measuring of gathered data.
- Editing, coding and processing of Marketing Research data.
- Field staff and field work and the overseeing of these to meet research objectives.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this marketing research qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Marketing Research industry, learners may also be able to follow a career in

- General Marketing
- Customer Services
- Data Base Marketing
- Direct Marketing
- Direct Selling
- Marketing Consultancy
- Marketing Management

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector eg. FMCG; Retail, Wholesale, Motor; Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc

A learner could follow a career in the Marketing Research field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 5	Cr	Total
Fundamental	Use a range of electronic media to sell an idea to a range of stakeholders	40	40
	Present data based on sound information technology practices	40	40
			80
Core	Conduct a marketing situational analysis	5	5
	Lead a team of marketers and service providers	10	10
	Develop, implement and manage a project / activity plan	5	5
	Implement a generic communication strategy	10	10
	Identify product features, advantages and benefits to the customer	10	10
	Provide product training to others in the organisation	10	10
	Close a deal with a customer	5	5
	Identify brand mix elements	8	8
	Identify financial implications for making decisions	8	4
	Integrate marketing plans with business process	6	6
	Coach others on principles of marketing in an organisation	5	5
	Monitor handling of customers by frontline customer service	6	6
	Manage customer requirements and needs and implement action plans	8	8
	Identify and manage areas of customer service impact	6	6
	Present data to stakeholders	5	5
	Analyse and interpret data and marketing information	8	8
			115
Elective	Design samples to represent the desired population	12	12
	Design a measuring instrument to gather the desired information	10	10
	Write editing, coding and data processing instructions for the desired analysis	8	8
	Organise field staff to ensure the desired data is collected	8	8
	Plan fieldwork to meet required deadlines and budget	10	10
			48

UNIT STANDARDS IN NATIONAL DIPLOMA IN MARKETING RESEARCH NQF LEVEL 5

UNIT STANDARDS ON NQF LEVEL 5

Core

1. Title Conduct a marketing situational analysis
2. Title Lead a team of marketers and service providers
3. Title Develop, implement and manage a project / activity plan
4. Title Implement a generic communication strategy
5. Title Identify product features, advantages and benefits to the customer
6. Title provide product training to others in the organisation
7. Title Close a deal with a customer
8. Title Identify brand mix elements
9. Title Identify financial implications for making decisions
10. Title Integrate marketing plans with business process
11. Title Coach others on principles of marketing in an organisation
12. Title Monitor handling of customers by frontline customer service
13. Title Manage customer requirements and needs and implement action plans
14. Title Identify and manage areas of customer service impact
15. Title Present data to stakeholders
16. Title Analyse and interpret data and marketing information

Elective

17. Title Design samples to represent the desired population
18. Title Design a measuring instrument to gather the desired information
19. Title Write editing, coding and data processing instructions for the desired analysis
20. Title Organise field staff to ensure the desired data is collected
21. Title Plan fieldwork to meet required deadlines and budget

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL DIPLOMA IN MARKETING RESEARCH NQF LEVEL 5

UNIT STANDARDS ON NQF LEVEL 5

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|----|------------------|---|
| 1. | Title | Conduct a marketing situational analysis |
| | Specific Outcome | 1.1. Gather data relating to project from the environment |
| | Specific Outcome | 1.2. Analyse data for the marketing situational analysis |
| | Specific Outcome | 1.3. Draw conclusion and make recommendations |

2. Title Lead a team of marketers and service providers
 - Specific Outcome 2.1 Set objectives for marketing team
 - Specific Outcome 2.2 Coach marketing staff to be able to achieve objectives
 - Specific Outcome 2.3 Monitor performance of marketing staff against targets
 - Specific Outcome 2.4 Provide feedback on performance
 - Specific Outcome 2.5 Take corrective action as needed

3. Title Develop, implement and manage a project / activity plan
 - Specific Outcome 3.1 Evaluate proposals and select preferred option
 - Specific Outcome 3.2 Conceptualise plan
 - Specific Outcome 3.3 Delegate tasks
 - Specific Outcome 3.4 Track project

4. Title Implement a generic communication strategy
 - Specific Outcome 4.1 Identify and explain a generic communications model
 - Specific Outcome 4.2 Analyse, interpret and implement a generic communication strategy

5. Title Identify product features, advantages and benefits to the customer
 - Specific Outcome 5.1 Identify needs of the customer
 - Specific Outcome 5.2 Present features, advantages and benefits to the customer
 - Specific Outcome 5.3 Demonstrate features, advantages and benefits

6. Title Provide product training to others in the organisation
 - Specific Outcome 6.1 Establish an environment conducive to learning and development needs
 - Specific Outcome 6.2 Implement the product training activities

7. Title Close a deal with a customer
 - Specific Outcome 7.1 Apply personal selling skills to sell products or services
 - Specific Outcome 7.2 Apply closing techniques to sell products or services

8. Title Identify brand mix elements
 - Specific Outcome 8.1 Describe factors influencing branding
 - Specific Outcome 8.2 Explain brand familiarity

9.	Title	Identify financial implications for making decisions
Specific Outcome	9.1	Evaluate financial statements against reporting requirements.
Specific Outcome	9.2	Apply financial analysis tools to interpret and report on financial implications
10.	Title	Integrate marketing plans with business process
Specific Outcome	10.1	Monitor the marketing environment and determine variables for marketing activities
Specific Outcome	10.2	Distinguish the role of marketing research and marketing information systems in investigating and understanding the operations of the market place
Specific Outcome	10.3	Distinguish characteristics of major markets
Specific Outcome	10.4	Identify influences on consumer behaviour in relation to marketing activities
11.	Title	Coach others on principles of marketing in an organisation
Specific Outcome	11.1	Describe marketing principles and ethics to others
Specific Outcome	11.2	Develop and implement a coaching / monitoring plan
Specific Outcome	11.3	Develop and implement a monitoring programme
Specific Outcome	11.4	Monitor events of a "marketing culture" in the organisation
12.	Title	Monitor handling of customers by frontline customer service
Specific Outcome	12.1	Monitor interaction between customer service providers and the customer
Specific Outcome	34.2	Monitor the customer's satisfaction
Specific Outcome	34.3	Monitor key performance areas
13.	Title	Manage customer requirements and needs and implement action plans
Specific Outcome	13.1	Listen to and interpret customer needs
Specific Outcome	13.2	Describe action plan
Specific Outcome	13.3	Implement action plan to meet customer's needs
Specific Outcome	13.4	Track and measure the action plan to its completion
14.	Title	Identify and manage areas of customer service impact
Specific Outcome	14.1	Identify "touch points" of customers
Specific Outcome	14.2	Determine solutions in areas of customer service
Specific Outcome	14.3	Action change or improve areas of customer service

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| 15. | Title | Present data to stakeholders |
| Specific Outcome | 15.1 | Develop the presentation of data to stakeholders |
| Specific Outcome | 15.2 | Present data to stakeholders |
| 16. | Title | Analyse and interpret data and marketing information |
| Specific Outcome | 16.1 | Analyse data and marketing information |
| Specific Outcome | 16.2 | Interpret data and marketing information |
| 17. | Title | Design samples to represent the desired population |
| Specific Outcome | 17.1 | Select appropriate sampling method |
| Specific Outcome | 17.2 | Design the sample to meet budget and timing constraints |
| Specific Outcome | 17.3 | Design the sample to meet analysis requirements |
| Specific Outcome | 17.4 | Design sample size appropriate for the decisions being taken |
| Specific Outcome | 17.5 | Construct sampling plan and instruction thereof |
| 18. | Title | Design a measuring instrument to gather the desired information |
| Specific Outcome | 18.1 | Decide upon question/discussion sequence (range: quantitative will apply to questionnaires and qualitative will apply to discussion guides) |
| Specific Outcome | 18.2 | Decide upon the wording of the questions |
| Specific Outcome | 18.3 | Ensure that the questions meet the analysis requirements |
| Specific Outcome | 18.4 | Pilot/pre-test measuring instrument |
| 19. | Title | Write editing, coding and data processing instructions for the desired analysis |
| Specific Outcome | 19.1 | Write editing and coding instructions |
| Specific Outcome | 19.2 | Write the data processing / analysis instructions |
| 20. | Title | Organise field staff to ensure the desired data is collected |
| Specific Outcome | 20.1 | Conduct briefing with all relevant parties |
| Specific Outcome | 20.2 | Train interviewers / moderators |
| Specific Outcome | 20.3 | Oversee fieldwork |
| Specific Outcome | 20.4 | Back check fieldwork |
| 21. | Title | Plan fieldwork to meet required deadlines and budget |
| Specific Outcome | 21.1 | Writing field instruction |
| Specific Outcome | 21.2 | Selecting appropriate interviewers / moderators for the target population and interview complexity |
| Specific Outcome | 21.3 | Planning cost effective field schedules |

No. 1209

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**NATIONAL FIRST DEGREE IN MARKETING RESEARCH NQF LEVEL 6**

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	6
Credit:	360
Issue date:	31 August 2001
Review date:	01 September 2003

Rational of the qualification

The National First Degree in Marketing Research: Level 6 is designed to meet the needs of those learners who want to progress in the field of Marketing and will assist those who make Marketing Research their chosen career path. The qualification in Marketing Research offers scope for a large variety of talents, displayed by individuals of diverse backgrounds, cultures, and of either gender.

The qualification in marketing can be followed in virtually every sector, i.e. business-to-business marketing, i.e. products or services sold to other businesses; services marketing, i.e. education, real estate, travel and tourism, legal services, etc; fast moving consumer goods, i.e. products people need and use every day; financial services, i.e. banking and insurance.

At the higher levels the Marketing profession needs a set of unit standards against which to align and measure it self.

The National First Degree in Marketing Research will provide and offer the skills, knowledge and understanding of marketing that are essential for analysis of market conditions, development of marketing strategies, product and brand development, pricing, distribution (local and international), integrated marketing communication (including advertising, promotions and public relations) and interaction with the customer (through selling and customer service).

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Field Interviewers
- Research Workers
- Research Executives
- Research Supervisors
- Research Directors
- Research Agents
- Field Managers
- Research Academics
- Research Managers
- Research Clerks
- Research Administrators

This qualification will help the learner at Level 6 to get the requirements of such a qualification, namely, the general knowledge and understanding of business functions as well as a detailed practical understanding of Marketing Research.

The qualification is structured in such a way that exposes individuals to a set of core competences to enable them to function in this role. The electives will provide for more special competence in the area of Marketing Research. The qualification will also promote the notion of life-long learning.

Purpose of the qualification

Learners acquiring this qualification would be operating in an advanced environment of Market Research and will be more involved in the development, enhancement and growth of Marketing Research Technologies and practice. Learners will be learning around areas of Strategy, Customer Relations and Marketing Principles. Learners will also be involved with core issues of Marketing Management, Customer Management and Marketing Communications but will be furthering their specialisation Marketing Research.

Access to the Qualification

As this is a unit standard based qualification, any learner who is competent in the unit standard as required by the core, fundamental and elective components stipulated in the qualification, will have free access to the qualification.

Learning assumed to be in place

Learners accessing this qualification will have demonstrated competence against the standards in the Diploma Marketing Communication or Marketing Research or Marketing Management or Customer Management or equivalent at NQF Level 5.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Articulate a vision and develop a strategic plan to meet the vision.
- Monitor and review activity plans and the performance levels of marketers and service providers.
- Manage all aspects of a communications project and review its effectiveness.
- Assess the sales environment in order to present a range of products and services to meet objectives.
- Identify and manage innovation opportunities and processes.
- Determine, co-ordinate and monitor brand mix decisions and elements.

- Integrate and promote marketing principles, including ethics policies throughout the organization.
- Formulate, design, implement, service delivery systems and processes.
- Measure and analyse customer service delivery systems and processes.
- Identify, design, implements, measure and analyse customer service levels.
- Establish and determine research requirements and design and recommend a research brief.
- Analyse and interpret research in line with research requirements and communicate results.
- Identify, design and manage research projects to meet requirements.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The articulation of vision into strategic marketing objectives and strategies then monitoring activity plans to meet objectives.
- Performance criteria in terms of setting, collecting, comparing and providing feedback on performance.
- Marketing Communications projects, their identification, evaluation, selection, management and review.
- A range of products and services and their presentation in line with objectives and time frames.
- Innovation as an important part of marketing and its successful implementation in an organisation.
- Brand mix and the role variables and brand mix decision have on outcomes.
- Marketing principles and ethics and the importance of promoting and integrating these into marketing policy.
- Customer service levels, measurement and analysis and the design and implementation of customer service delivery systems.
- Research requirement, their establishment and systems and the design of a research brief.
- Research requirements are analyses and data collected, processed and communicated to relevant parties.
- Research projects are designed and managed to meet the requirements of the research brief.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Marketing Research qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Marketing Research industry, learners may also be able to follow a career in

- General Marketing
- Customer Services
- Data Base Marketing
- Direct Marketing
- Direct Selling
- Marketing Consultancy
- Marketing Management

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector eg. FMCG; Retail, Wholesale, Motor, Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc

A learner could follow a career in the Marketing Research field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 6	Cr	Total
Fundamental	Present a strategy using creative means to a range of stakeholders	60	60
	Interpret historical data and present a range of formula to influence decision making	60	60 60
			120
Core	Develop a strategic plan	15	15
	Monitor and review activity plan	7	7
	Monitor performance of marketers and service providers	10	10
	Manage a communications projects	15	15
	Present a range of products or services	15	15
	Identify innovation opportunities	15	15
	Integrate brand mix elements	15	15
	Promote principles of Marketing throughout organisations	8	8
	Integrate ethics policy into marketing policy	6	6
	Measure and analyse customer service level	12	12
	Formulate, design and implement customer service delivery systems and processes	8	8
	Conceptualise and research requirements	10	10
	Design a research brief	10	10
			146
Elective	Analyse and interpret research in line with research requirements and communicate results	32	32
		32	32
	Design research projects that meets the requirements of the brief	30	30
	Manage research project		
			96

UNIT STANDARDS IN NATIONAL FIRST DEGREE IN MARKETING RESEARCH NQF LEVEL 6

UNIT STANDARDS ON NQF LEVEL 6

Core

1. Title Develop a strategic plan
2. Title Monitor and review activity plan
3. Title Monitor performance of marketers and service providers
4. Title Manage a communications projects
5. Title Present a range of products or services
6. Title Identify innovation opportunities
7. Title Integrate brand mix elements
8. Title Promote principles of Marketing throughout organisations
9. Title Integrate ethics policy into marketing policy
10. Title Measure and analyse customer service level
11. Title Formulate, design and implement customer service delivery systems and processes
12. Title Conceptualise and research requirements
13. Title Design a research brief

Elective

14. Title Analyse and interpret research in line with research requirements and communicate results
15. Title Design research projects that meets the requirements of the brief
16. Title Manage research project

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL FIRST DEGREE IN MARKETING RESEARCH NQF LEVEL 6

UNIT STANDARDS ON NQF LEVEL 6

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|------------------|-------|---|
| 1. | Title | Develop a strategic plan. |
| Specific Outcome | 1.1 | Articulate the vision in a marketing context |
| Specific Outcome | 1.2 | Analyse possible long term trends with macro, micro, market and competitor environments |
| Specific Outcome | 1.3 | Develop strategic marketing objectives |
| Specific Outcome | 1.4 | Develop alternative long-term strategies |
| Specific Outcome | 1.5 | Evaluate and recommend "best " strategy |

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| 2. | Title | Monitor and review activity plan |
| Specific Outcome | 2.1 | Check activities to be performed in activity plans |
| Specific Outcome | 2.2 | Evaluate results |
| Specific Outcome | 2.3 | Develop options to counteract variances |
| Specific Outcome | 2.4 | Evaluation of options |
| Specific Outcome | 2.5 | Made recommendations |
| 3. | Title | Monitor performance of marketers and service providers |
| Specific Outcome | 3.1 | Set performance criteria |
| Specific Outcome | 3.2 | Collect relevant data |
| Specific Outcome | 3.3 | Compare actual to standard |
| Specific Outcome | 3.4 | Give feedback to marketers and service providers |
| 4. | Title | Manage a communications projects |
| Specific Outcome | 4.1 | Identify, evaluate and select the communications methods and format |
| Specific Outcome | 4.2 | Manage the communications project implementation |
| Specific Outcome | 4.3 | Review the communications project effectiveness |
| 5. | Title | Present a range of products or services |
| Specific Outcome | 5.1 | Establish objectives for presenting a range of products or services |
| Specific Outcome | 5.2 | Assess the internal and external sales environment |
| Specific Outcome | 5.3 | Present a range of products or services |
| 6. | Title | Identify innovation opportunities |
| Specific Outcome | 6.1 | Identify and examine processes and methods to facilitate innovation within an organisation |
| Specific Outcome | 6.2 | Lead and manage innovation processes within an organisation |
| 7. | Title | Integrate brand mix elements |
| Specific Outcome | 7.1 | Determine variables of the brand mix |
| Specific Outcome | 7.2 | Confirm, co-ordinate and monitor brand mix decisions |
| 8. | Title | Promote principles of Marketing throughout organisations |
| Specific Outcome | 8.1 | Design and develop appropriate programme to achieve desired culture |
| Specific Outcome | 8.2 | Implement programme to achieve desired culture |
| Specific Outcome | 8.3 | Evaluate programme |

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| 9. | Title | | Integrate ethics policy into marketing policy |
| | Specific Outcome | 9.1 | Ensure that ethics are integrated into the marketing programme |
| | Specific Outcome | 9.2 | Evaluate marketing ethics practices |
| | Specific Outcome | 9.3 | Correct unethical marketing practices |
| 10. | Title | | Measure and analyse customer service level |
| | Specific Outcome | 10.1 | Identify factors which influence customer service and perceptions |
| | Specific Outcome | 10.2 | Design methodologies to measure factors and perceptions of customer service |
| | Specific Outcome | 10.3 | Implement customer service measurement processes and collect data |
| | Specific Outcome | 10.4 | Analyse measurement results of customer service levels |
| 11. | Title | | Formulate, design and implement customer service delivery systems and processes |
| | Specific Outcome | 11.1 | Developing and implementing an action plan to achieve desired service levels |
| | Specific Outcome | 11.2 | Monitor progress and effectiveness of action plans implemented |
| 12. | Title | | Conceptualise and research requirements |
| | Specific Outcome | 12.1 | Establish research requirements |
| | Specific Outcome | 12.2 | Determine research requirement systems |
| 13. | Title | | Design a research brief |
| | Specific Outcome | 13.1 | Assess and recommend a research brief |
| | Specific Outcome | 13.2 | Design a research brief to optimise results. |
| 14. | Title | | Analyse and interpret research in line with research requirements and communicate results |
| | Specific Outcome | 14.1 | Conduct relevant analyses. |
| | Specific Outcome | 14.2 | Collate pertinent information from data. |
| | Specific Outcome | 14.3 | Transform information into knowledge. |
| | Specific Outcome | 14.4 | Draw conclusion from research results. |
| | Specific Outcome | 14.5 | Communicate data, information and conclusions to end-user. |

15. Title Design research projects that meets the requirements of the brief.

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| Specific Outcome | 15.1 | Identify information needs. |
| Specific Outcome | 15.2 | Design appropriate sample. |
| Specific Outcome | 15.3 | Design appropriate data collection tool. |
| Specific Outcome | 15.4 | Identify available sources of information. |
| Specific Outcome | 15.5 | Draw up project plan / proposal. |

16. Title Manage research project.

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| Specific Outcome | 16.1 | Manage fieldwork. |
| Specific Outcome | 16.2 | Manage data processing. |
| Specific Outcome | 16.3 | Manage data capture. |

No. 1210

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**NATIONAL SECOND DEGREE IN MARKETING RESEARCH NQF LEVEL 7**

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	7
Credit:	484
Issue date:	31 August 2001
Review date:	01 September 2003

Rationale of the qualification

The National Second Degree in Marketing Research: Level 7 is designed to meet the needs of those learners who want to progress in the field of Marketing and will assist those who make Marketing Research their chosen career path. The qualification in Marketing Research offers scope for a large variety of talents, displayed by individuals of diverse backgrounds, cultures, and of either gender.

The qualification in marketing can be followed in virtually every sector, i.e. business-to-business marketing, i.e. products or services sold to other businesses; services marketing, i.e. education, real estate, travel and tourism, legal services, etc; fast moving consumer goods, i.e. products people need and use every day; financial services, i.e. banking and insurance.

At the higher levels the Marketing profession needs a set of unit standards against which to align and measure it self.

The National Second Degree in Marketing Research will provide and offer the skills, knowledge and understanding of marketing that are essential for analysis of market conditions, development of marketing strategies, product and brand development, pricing, distribution (local and international), integrated marketing communication (including advertising, promotions and public relations) and interaction with the customer (through selling and customer service).

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Field Interviewers
- Research Workers
- Research Executives
- Research Supervisors
- Research Directors
- Research Agents
- Field Managers
- Research Academics
- Research Managers
- Research Clerks
- Research Administrators

This qualification will help the learner at Level 7 to get the requirements of such a qualification, namely, the general knowledge and understanding of business functions as well as a detailed practical understanding of Marketing Research.

The qualification is structured in such a way that exposes individuals to a set of core competences to enable them to function in this role. The electives will provide for more special competence in the area of Marketing Research. The qualification will also promote the notion of life-long learning.

Purpose of the qualification

This higher degree will allow learners to operate at a strategic and conceptual level in designing and strategising new technologies, methodologies and techniques of furthering the purposes and benefits of Marketing Research.

Access to the Qualification

As this is a unit standard based qualification, any learner who is competent in the unit standard as required by the core, fundamental and elective components stipulated in the qualification, will have free access to the qualification.

Learning assumed to be in place

Learners accessing this qualification will have demonstrated competence against the standards in the National Degree - Marketing Research or equivalent NQF 6.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Analyse and evaluate global trends and develop a vision for an organization.
- Develop a monitoring system and evaluate and monitor a strategic marketing plan.
- Monitor and control all aspects of an internal or external marketing unit.
- Interpret a brief and develop a public relations and marketing campaign.
- Develop, plan and review alternative marketing opportunities.
- Assess current marketing culture and set marketing culture and ethics objectives to instill a marketing culture and ethics in all stakeholder groups.
- Create and maintain a positive culture of customer service in the supply chain and conceptualise innovative customer service strategies.

- Develop, assess and write research policies and sponsor research activities for market research projects.
- Develop and integrate all aspects of marketing research programmes and manage specialized areas in marketing research to meet corporate business objectives.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The overall process for developing an organisation vision.
- The strategic marketing plans development and evaluation.
- The process for starting and structuring a marketing unit and the application of financial plans and controls.
- Public relations and marketing campaigns are defined and interpreted strategies developed to meet requirements.
- The involvement of all stakeholders to develop alternative opportunities.
- Marketing culture establishment in all stakeholder groups.
- Marketing best practice ethics are established, set and implemented within given resource constraints.
- Customer service culture is developed and innovative systems conceptualised to meet objectives.
- Research projects are identified, sponsored and monitored.
- Research policies are developed, agreed and recommended and assist organisation to meet its objectives.
- Research techniques, processes and products are developed and integrated to meet corporate business objectives.
- Specialised marketing research situations are managed.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Marketing Research qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Marketing Research industry, learners may also be able to carry out careers in

- General Marketing
- Customer Services
- Data Base Marketing
- Direct Marketing
- Direct Selling
- Marketing Consultancy
- Marketing Management

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector e.g. FMCG; Retail, Wholesale, Motor; Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc

A learner could follow a career in the Marketing Research field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 7	Cr	Total
Fundamental	Present a national strategy benchmarked to add value internationally	70	70
	Establish scenarios of best practice	70	70 60
			140
Core	Develop a vision for an organisation	20	20
	Monitor and evaluate a strategic marketing plan	20	20
	Manage a Marketing Unit (Internal or External)	60	60
	Develop a public relations and marketing campaign	20	20
	Generate alternative opportunities	10	10
	Instill Marketing culture in all stakeholder groups	8	8
	Set Marketing Ethics Policy	8	8
	Create a culture of customer service in the supply chain	20	20
	Conceptualise innovative customer service systems and strategies	30	30
	Sponsor research projects	10	10
	Set research policy	10	10
			216
Elective	Develop and integrate all aspects of the research programme to meet the corporate business objectives	90	90
	Manage specialised areas in marketing research	40	40
			130

UNIT STANDARDS IN NATIONAL SECOND DEGREE IN MARKETING RESEARCH NQF LEVEL 7

UNIT STANDARDS ON NQF LEVEL 7

Core

1. Title Develop a vision for an organisation
2. Title Monitor and evaluate a strategic marketing plan
3. Title Manage a Marketing Unit (Internal or External)
4. Title Develop a public relations and marketing campaign
5. Title Generate alternative opportunities
6. Title Instill Marketing culture in all stakeholder groups
7. Title Set Marketing Ethics Policy
8. Title Create a culture of customer service in the supply chain
9. Title Conceptualise innovative customer service systems and strategies
10. Title Sponsor research projects
11. Title Set research policy

Elective

12. Title Develop and integrate all aspects of the research programme to meet the corporate business objectives
13. Title Manage specialised areas in marketing research

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL SECOND DEGREE IN MARKETING RESEARCH NQF LEVEL 7

UNIT STANDARDS ON NQF LEVEL 7

1. Title Develop a strategic plan.

Specific Outcome	1.1	Articulate the vision in a marketing context
Specific Outcome	1.2	Analyse possible long term trends with macro, micro, market and competitor environments
Specific Outcome	1.3	Develop strategic marketing objectives
Specific Outcome	1.4	Develop alternative long-term strategies
Specific Outcome	1.5	Evaluate and recommend "best " strategy

2. Title Monitor and review activity plan

Specific Outcome	2.1	Check activities to be performed in activity plans
Specific Outcome	2.2	Evaluate results
Specific Outcome	2.3	Develop options to counteract variances
Specific Outcome	2.4	Evaluation of options
Specific Outcome	2.5	Made recommendations

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| 3. | Title | | Monitor performance of marketers and service providers |
| | Specific Outcome | 3.1 | Set performance criteria |
| | Specific Outcome | 3.2 | Collect relevant data |
| | Specific Outcome | 3.3 | Compare actual to standard |
| | Specific Outcome | 3.4 | Give feedback to marketers and service providers |
| 4. | Title | | Manage a communications projects |
| | Specific Outcome | 4.1 | Identify, evaluate and select the communications methods and format |
| | Specific Outcome | 4.2 | Manage the communications project implementation |
| | Specific Outcome | 4.3 | Review the communications project effectiveness |
| 5. | Title | | Present a range of products or services |
| | Specific Outcome | 5.1 | Establish objectives for presenting a range of products or services |
| | Specific Outcome | 5.2 | Assess the internal and external sales environment |
| | Specific Outcome | 5.3 | Present a range of products or services |
| 6. | Title | | Identify innovation opportunities |
| | Specific Outcome | 6.1 | Identify and examine processes and methods to facilitate innovation within an organisation |
| | Specific Outcome | 6.2 | Lead and manage innovation processes within an organisation |
| 7. | Title | | Integrate brand mix elements |
| | Specific Outcome | 7.1 | Determine variables of the brand mix |
| | Specific Outcome | 7.2 | Confirm, co-ordinate and monitor brand mix decisions |
| 8. | Title | | Promote principles of Marketing throughout organisations |
| | Specific Outcome | 8.1 | Design and develop appropriate programme to achieve desired culture |
| | Specific Outcome | 8.2 | Implement programme to achieve desired culture |
| | Specific Outcome | 8.3 | Evaluate programme |
| 9. | Title | | Integrate ethics policy into marketing policy |
| | Specific Outcome | 9.1 | Ensure that ethics are integrated into the marketing programme |
| | Specific Outcome | 9.2 | Evaluate marketing ethics practices |
| | Specific Outcome | 9.3 | Correct unethical marketing practices |

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| 10. | Title | Measure and analyse customer service level |
| Specific Outcome | 10.1 | Identify factors which influence customer service and perceptions |
| Specific Outcome | 10.2 | Design methodologies to measure factors and perceptions of customer service |
| Specific Outcome | 10.3 | Implement customer service measurement processes and collect data |
| Specific Outcome | 10.4 | Analyse measurement results of customer service levels |
| 11. | Title | Formulate, design and implement customer service delivery systems and processes |
| Specific Outcome | 11.1 | Developing and implementing an action plan to achieve desired service levels |
| Specific Outcome | 11.2 | Monitor progress and effectiveness of action plans implemented |
| 12. | Title | Develop and integrate all aspects of the research programme to meet the corporate business objectives |
| Specific Outcome | 12.1 | Develop/adapt research techniques, processes and products to add Value to research programmes |
| Specific Outcome | 12.2 | Integrate elements of the research process in line with corporate business objectives |
| Specific Outcome | 12.3 | Integrate research information into strategic recommendations to meet corporate business objectives |
| Specific Outcome | 12.4 | Adapt international standard practice to be relevant within the SA context |
| Specific Outcome | 12.5 | Guide and educate clients on what Market Research can or cannot do for them |
| 13. | Title | Manage specialised areas in marketing research |
| Specific Outcome | 13.1 | Manage consumer marketing management |
| Specific Outcome | 13.2 | Manage business-to-business marketing management |
| Specific Outcome | 13.3 | Manage marketing management for non-profit organisations |
| Specific Outcome | 13.4 | Manage marketing management for service industry |

No. 1211

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY



NATIONAL CERTIFICATE IN MARKETING MANAGEMENT NQF LEVEL 4

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	4
Credit:	134
Issue date:	31 August 2001
Review date:	01 September 2003

Rationale of the qualification

The National Qualification in Marketing Management: Level 4 is designed to meet the needs of those learners who enter the field of Marketing Management. The whole marketing field per se is a key business function necessary for the success of any organisation, both strategically and operationally. The qualification is inextricably linked to the Standard Generating Body's (SGB's), definition of Marketing, "to identify, anticipate and satisfy current and future consumer and customer expectations, needs and problems by facilitating and consummating exchange to achieve targeted levels of profitability and / or value in an accountable and socially responsible manner. The Marketing Management National Certificate at NQF Level 4 will provide a broad knowledge and skills needed in the industry and to progress along a career path for learners who

- Were previously disadvantaged or who were unable to complete their schooling and were therefore denied access to Further Education and Training.
- Have worked in Marketing Management for many years, but have no formal qualification in Marketing Management.
- Wish to extend their range of skills and knowledge of the industry so that they can become knowledge workers in Marketing Management.

The National Certificate in Marketing Management: Level 4 allows the learner to work towards a nationally recognised whole qualification. The qualification will allow both those in formal educations and those already employed in marketing organisations access, due to its flexibility. It aims to develop individuals who are informed and skilled in Marketing Management.

The qualification has building blocks that can be developed further and will lead to a more defined Marketing Management career path at NQF Level 5. It also focuses on the skills, knowledge, values and attitudes required to progress further. The intention is

- To promote the development of knowledge and skills that are required in all sub-sectors of marketing.
- To release the potential of people.
- To provide opportunities for people to move up the value chain.

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Marketing Managers
- Brand Managers
- Brand Assistants
- Category Managers
- Marketing Directors
- Marketing Assistants
- Product Managers

The National Certificate in Marketing Management: Level 4 should produce knowledgeable, skilled Marketing Managers who are able to contribute to improved productivity and efficiency within the marketing industry. It should provide the means for current individuals in the Marketing Management field to receive recognition of prior learning and to upgrade their skills and knowledge base. The qualification is structured in such a way that exposes individuals to a set of core competences to give a broad understanding of marketing and the electives, which will allow for a specific competence in Marketing Management. It will also promote the notion of life-long learning.

Purpose of the qualification

Any individuals who are or wish to be involved in Marketing Management will access this qualification. It also serves as the entry qualification into Marketing Management Qualifications in the higher band of learning. This qualification will be registered at NQF Level 4. This qualification is also related to other qualifications such as the National Certificate in Customer Management, the National Certificate in Market Research and the National Certificate in Marketing Communications where all four of these qualifications will share fundamental competence as well as core competence. Portability across all four of these National Certificates are therefore ensured.

Access to the Qualification

As this is a "complete and whole" qualification, any learner who can provide guidance of the learning assumed to be in place, has open access to this qualification.

Learning assumed to be in place

Learners accessing this qualification will have demonstrated competence in communicating verbally and in writing and computer technology at Level 3 on the NQF or equivalent.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Work with other members of a marketing team to meet performance standards and objectives.
- Identify, assess, utilize and account for marketing expertise and resources in order to meet marketing objectives and report on results.
- Identify prospective customers and their needs and present the correct features, advantages and benefits to enable customers to make informed buying decisions.
- Demonstrate an understanding of product positioning, product life cycles, market segmentation, marketing mix and the competitive environment for products and services.
- Demonstrate an understanding for and comply with legislation, rules, activities and transactions.
- Identify and evaluate brand product and service promotional opportunities and co-ordinate and evaluate promotional activities and results.
- Comply with organisational ethics by applying marketing principles, concepts and culture through the identification of all stakeholders and their relationships.
- Liase with a range of customers and identifying and solving customers complaints and problems.
- Identify, monitor and review marketing information and gather and process data for research and information purposes.
- Implement and track financial issues pertaining to marketing and monitor competitor activities while maintaining brand and corporate identity.
- Maintain communication and relationships with all stakeholders.
- Manage Marketing activity plans to meet agreed deadlines.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The importance of working together and communicating with all stakeholders in order to meet marketing requirements and objectives.
- Giving identified customers the correct information (features, advantages and benefits) to enable them to make informed buying decisions.
- The legal and ethical requirements in the marketing field.
- Product positioning, target markets and the competitive environment.
- Promotions which deal with either brand, product or service.
- The importance of knowing the internal and external stakeholders and believing in marketing as a profession.
- The methods, techniques and principles of dealing with customers and clients to meet their needs.
- Being able to source expertise and resources to assist with information gathering and processing.
- What financial issues to track to ensure success in meeting marketing needs and requirements.
- How to measure and track critical success factors, key brand indicators and competitor activities.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this marketing research qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Marketing Management industry, learners may also be able to enter careers in

- Brand Management
- Product Management
- Marketing Communications
- Marketing Research
- Customer Management
- Sales
- Customer Service
- Direct marketing
- General Marketing
- Data Base Marketing
- Direct Selling
- Advertising
- Promotions
- Public Relations

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector eg. EMCG; Retail, Wholesale, Motor, Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc

A learner could follow a career in the Marketing Management field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 4	Cr	Total
Fundamental	Communicate verbally and in writing to a range of stakeholders	20	20
	Work with a range of software packages to generate, maintain and manipulate data	20	20
			40
Core	Work as a member of a marketing team	5	5
	Meet marketing performance standards	4	4
	Identify and utilise marketing resources to meet objectives	4	4
	Describe features, advantages and benefits of a range of products	6	6
	Identify customers of the business	4	4
	Demonstrate an understanding of product positioning	4	4
	Comply with legal requirements and understand implications	4	4
	Deal with brand, product and service promotions	4	4
	Demonstrate an understanding of the target market	4	4
	Demonstrate an understanding of the competitive environment	4	4
	Instill in myself a personal marketing culture	4	4
	Comply with organisational ethics	4	4
	Identify internal and external stakeholders	4	4
	Liaise with a range of customers of a business	4	4
	Handle a range of customer complaints	4	4
	Identify expertise and resources	3	3
	Monitor marketing information flow and collect and process marketing data	4	4
			70
Elective	Carry out marketing administration within agreed parameters	10	10
	Implement activity plans meeting agreed deadlines	14	14
			24

UNIT STANDARDS IN NATIONAL CERTIFICATE IN MARKETING MANAGEMENT NQF LEVEL 4**UNIT STANDARDS ON NQF LEVEL 4****Core**

1. Title Work as a member of a marketing team
2. Title Meet marketing performance standards
3. Title Identify and utilise marketing resources to meet objectives
4. Title Describe features, advantages and benefits of a range of products
5. Title Identify customers of the business
6. Title Demonstrate an understanding of product positioning
7. Title Comply with legal requirements and understand implications
8. Title Deal with brand, product and service promotions
9. Title Demonstrate an understanding of the target market
10. Title Demonstrate an understanding of the competitive environment
11. Title Instil in myself a personal marketing culture
12. Title Comply with organisational ethics
13. Title Identify internal and external stakeholders
14. Title Liaise with a range of customers of a business
15. Title Handle a range of customer complaints
16. Title Identify expertise and resources
17. Title Monitor marketing information flow and collect and process marketing data

Elective

18. Title Carry out marketing administration within agreed parameters
19. Title Implement activity plans meeting agreed deadlines

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL CERTIFICATE IN MARKETING MANAGEMENT NQF LEVEL 4**UNIT STANDARDS ON NQF LEVEL 4**

1. Title Work as a member of a marketing team

Specific Outcome	1.1	Communicate with all relevant stakeholders to enhance teamwork
Specific Outcome	1.2	Report on team progress to appropriate authority and team
Specific Outcome	1.3	Display tendencies to work with others as a member of a marketing team
Specific Outcome	1.4	Handle and resolve areas of conflict

2. Title Meet marketing performance standards

Specific Outcome	2.1	Demonstrate an understanding of marketing performance standards
Specific Outcome	2.2	Follow instructions to meet standards
Specific Outcome	2.3	Meet marketing objectives
Specific Outcome	2.4	Report on marketing objectives progress

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| 3. | Title | Identify and utilise marketing resources to meet objectives |
| Specific Outcome | 3.1 | Identify and assess marketing resources required |
| Specific Outcome | 3.2 | Utilise marketing resources to meet objectives |
| Specific Outcome | 3.3 | Account for marketing resources |
| 4. | Title | Describe features, advantages and benefits of a range of products |
| Specific Outcome | 4.1 | Determine and communicate product features, advantages and benefits |
| Specific Outcome | 4.2 | Describe physical specifications, features, advantages and benefits |
| 5. | Title | Identify customers of the business |
| Specific Outcome | 5.1 | Identify prospective customers and establish their needs |
| Specific Outcome | 5.2 | Establish and build the customer base |
| 6. | Title | Demonstrate an understanding of product positioning |
| Specific Outcome | 6.1 | Describe and explain product positioning strategies |
| Specific Outcome | 6.2 | Position the product in relation to the market |
| Specific Outcome | 6.3 | Explain and describe product life cycles |
| 7. | Title | Comply with legal requirements and understand implications |
| Specific Outcome | 7.1 | Use and interpret legal documentation to ensure compliance with legal and organisational requirements |
| Specific Outcome | 7.2 | Comply with legislation and rules which regulate the conduct in a marketing business |
| Specific Outcome | 7.3 | Apply the various aspects of marketing law and statutory requirements applicable to marketing transactions |
| 8. | Title | Deal with brand, product, and service promotions |
| Specific Outcome | 8.1 | Evaluate brand, product and service promotion opportunities |
| Specific Outcome | 8.2 | Co-ordinate brand, product and sales promotions |
| Specific Outcome | 8.3 | Evaluate brand, product and service promotions |
| 9. | Title | Demonstrate an understanding of the target market |
| Specific Outcome | 9.1 | Describe market segmentation and market segmentation processes |
| Specific Outcome | 9.2 | Explain positioning strategies for chosen segments |
| Specific Outcome | 9.3 | Explain market segmentation in relation to the marketing mix |

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| 10. | Title | | Demonstrate an understanding of the competitive environment |
| | Specific Outcome | 10.1 | Explain the nature and the extent of the competitive environment |
| | Specific Outcome | 10.2 | Retain the competitive environment of products or services |
| 11. | Title | | Instill in myself a personal marketing culture |
| | Specific Outcome | 11.1 | Identify and define what marketing is |
| | Specific Outcome | 11.2 | Identify marketing principles and concepts |
| | Specific Outcome | 11.3 | Identify the benefits of instilling in self a marketing culture |
| | Specific outcome | 11.4 | Persuade others of the benefits of a marketing culture |
| 12. | Title | | Instill in myself a personal marketing culture |
| | Specific Outcome | 12.1 | Describe the code of conduct and ethical issues |
| | Specific Outcome | 12.2 | Adhere to code of conduct |
| | Specific Outcome | 12.3 | Identify and understand the ethical issues in the organisation |
| 13. | Title | | Identify internal and external stakeholders |
| | Specific Outcome | 13.1 | Identify internal and external stakeholders |
| | Specific Outcome | 13.2 | Describe the stakeholders' relationship to each other |
| | Specific Outcome | 13.3 | Initiate contact with a range of customers |
| 14. | Title | | Liaise with a range of customers of a business |
| | Specific Outcome | 14.1 | Initiate contact with a range of customers |
| | Specific Outcome | 14.2 | Maintain contact with a range of customers |
| | Specific Outcome | 14.3 | Administer contact with a range of customers |
| 15. | Title | | Handle a range of customer complaints |
| | Specific Outcome | 15.1 | Identify the customers problem |
| | Specific Outcome | 15.2 | Commit to solving the customer's problem |
| | Specific Outcome | 15.3 | Arrange correct planning and solution to the customer's problem |
| | Specific Outcome | 15.4 | Communicate with all stakeholders |
| | Specific Outcome | 15.5 | Provide Practical business solutions |
| 16. | Title | | Identify expertise and resources |
| | Specific Outcome | 16.1 | Determine criteria for expertise and resources |
| | Specific Outcome | 16.2 | Establish and record expertise and resources |
| | Specific Outcome | 16.3 | Report on expertise and resources |

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| 17. | Title | Monitor marketing information flow and collect and process marketing data |
| Specific Outcome | 17.1 | Identify marketing information flow needs |
| Specific Outcome | 17.2 | Monitor and review marketing information flow |
| Specific Outcome | 17.3 | Gather data for researching and information purposes |
| Specific Outcome | 17.4 | Process data for researching information purposes |
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| 18. | Title | Follow sampling requirements |
| Specific Outcome | 18.1 | Track budgets in accordance with marketing needs |
| Specific Outcome | 18.2 | Monitor critical success factors and key indicators of brand |
| Specific Outcome | 18.3 | Track pricing |
| Specific Outcome | 18.4 | Monitor competitors activities |
| Specific Outcome | 18.5 | Maintain brand and corporate identity materials |
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| 19. | Title | Implement marketing activity plans to meet agreed deadlines |
| Specific outcome | 19.1 | Communicate with internal and external stakeholders |
| Specific Outcome | 19.2 | Maintain relationship with providers |
| Specific Outcome | 19.3 | Manage and monitor marketing activity plans |
| Specific Outcome | 19.4 | Evaluate completed marketing activities |

No. 1212

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY



NATIONAL DIPLOMA IN MARKETING MANAGEMENT NQF LEVEL 5

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	5
Credit:	243
Issue date:	31 August 2001
Review date:	01 September 2003

Rationale of the qualification

The National Diploma in Marketing Management: Level 5 is designed to meet the needs of those learners who are already involved in the field of Marketing Management or who enter the field at a higher level. Learners recognise that marketing is an essential and key business function necessary for the success of any organisation, both strategically and operationally. The qualification is inextricably linked to the Standard Generating Body's (SGB's), definition of Marketing, "to identify, anticipate and satisfy current and future consumer and customer expectations, needs and problems by facilitating and consummating exchange to achieve targeted levels of profitability and / or value in an accountable and socially responsible manner.

This qualification also reflects the needs of the marketing sector both now and in the future: it gives accessibility and flexibility to the learner and to the employer. The level of flexibility is reflected in the multiple job roles and careers, organisational requirements and changing technological nature of marketing and at the same time it allows the individual to work towards a nationally recognised qualification

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Marketing Managers
- Brand Managers
- Brand Assistants
- Category Managers
- Marketing Directors
- Marketing Assistants
- Product Managers

The National Diploma in Marketing Management is structured in such a way that it exposes learners to a broad set of core competences while the electives allow for special competence in Marketing Management. It certainly promotes the notion of life-long learning.

Purpose of the qualification

Learners acquiring this qualification will have demonstrated competence at NQF Level 4 in the area of Marketing Management or will have attained an equivalent qualification at that level. This qualification will be registered at NQF Level 5 on the National Qualification Framework and learners will have acquired a range of fundamental, core and elective competence around the areas of Marketing Strategy, Marketing Customer Relations, Principles of Marketing, Marketing Communications, Marketing Management, Marketing Research and Customer Management. Learners will have also demonstrated competence against specialised outcomes in the area of Marketing Management.

Access to the Qualification

As this is a unit standard based qualification, any learner who is competent in the unit standard as required by the core, fundamental and elective components stipulated in the qualification, will have free access to the qualification.

Learning assumed to be in place

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.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Conduct a marketing situational analysis while leading a team of Marketers and Service Providers.
- Develop, implement and manage a marketing related project and / or activity plan, and implement a generic marketing communications strategy.
- Present the features, advantages and benefits of products to customers so that a deal can be closed.
- Provide product training to others in the organisation and coach others on the principles of marketing in an organisation.
- Identify brand mix elements and financial implications for decision making.
- Integrate marketing plans with the business process.
- Monitor and control the handling of customers, customer needs and requirements and areas of customer service impact.
- Analyse and interpret marketing information and present marketing data to stakeholders.
- Identify, implement and manage marketing strategies and plans to meet organizational requirements.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- Data gathering processes, it's analysis and the drawing of conclusions and making recommendations.
- How to get the best results from a team of marketers or service providers by monitoring and rectifying performance.
- Project plans and their successful conclusion.
- Communications models and strategies and the elements and processes.
- Customer needs and their identification to enable the production and demonstration of features, advantages and benefits.
- Training and coaching environment establishment and implementation.
- Product and service selling methods, techniques and principles.
- Brand influences and familiarity factors.
- Financial statement analysis and evaluation.
- Marketing activities and the issues, roles and characteristics that affect them.
- Customer service providers and their interaction to establish satisfied customers by interpreting and meeting customer needs and all areas that impact on customer service levels.
- Marketing data, it's analysis; interpretation and presentation to all stakeholders.
- Marketing strategies and marketing plans and the development and implementation.

International Comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Marketing Communications Qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Marketing Management industry, learners may also be able to follow a career in

- Brand Management
- Product Management
- Marketing Communications
- Marketing Research
- Customer Management
- Sales
- Customer Service
- Direct marketing
- General Marketing
- Data Base Marketing
- Direct Selling
- Advertising
- Promotions
- Public Relations

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector eg. EMCG; Retail, Wholesale, Motor; Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc

A learner could follow a career in the Marketing Management field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 5	Cr	Total
Fundamental	Use a range of electronic media to sell an idea to a range of stakeholders	40	40
	Present data based on sound information technology practices	40	40
			80
Core	Conduct a marketing situational analysis	5	5
	Lead a team of marketers and service providers	10	10
	Develop, implement and manage a project / activity plan	5	5
	Implement a generic communication strategy	10	10
	Identify product features, advantages and benefits to the customer	10	10
	Provide product training to others in the organisation	10	10
	Close a deal with a customer	5	5
	Identify brand mix elements	8	8
	Identify financial implications for making decisions	8	4
	Integrate marketing plans with business process	6	6
	Coach others on principles of marketing in an organisation	5	5
	Monitor handling of customers by frontline customer service	6	6
	Manage customer requirements and needs and implement action plans	8	8
	Identify and manage areas of customer service impact	6	6
	Present data to stakeholders	5	5
	Analyse and interpret data and marketing information	8	8
			115
Elective	Develop marketing strategies in line with portfolio strategy	28	28
	Develop and implement marketing plan in line with marketing strategy	20	20
			48

UNIT STANDARDS IN NATIONAL DIPLOMA IN MARKETING MANAGEMENT NQF LEVEL 5

UNIT STANDARDS ON NQF LEVEL 5

Core

1. Title Conduct a marketing situational analysis
2. Title Lead a team of marketers and service providers
3. Title Develop, implement and manage a project / activity plan
4. Title Implement a generic communication strategy
5. Title Identify product features, advantages and benefits to the customer
6. Title provide product training to others in the organisation
7. Title Close a deal with a customer
8. Title Identify brand mix elements
9. Title Identify financial implications for making decisions
10. Title Integrate marketing plans with business process
11. Title Coach others on principles of marketing in an organisation
12. Title Monitor handling of customers by frontline customer service
13. Title Manage customer requirements and needs and implement action plans
14. Title Identify and manage areas of customer service impact
15. Title Present data to stakeholders
16. Title Analyse and interpret data and marketing information

Elective

17. Title Develop marketing strategies in line with portfolio strategy
18. Title Develop and implement marketing plan in line with marketing strategy

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL DIPLOMA IN MARKETING MANAGEMENT NQF LEVEL 5

UNIT STANDARDS ON NQF LEVEL 5

1. Title Conduct a marketing situational analysis

Specific Outcome	1.1	Gather data relating to project from the environment
Specific Outcome	1.2	Analyse data for the marketing situational analysis
Specific Outcome	1.3	Draw conclusion and make recommendations

2. Title Lead a team of marketers and service providers

Specific Outcome	2.1	Set objectives for marketing team
Specific Outcome	2.2	Coach marketing staff to be able to achieve objectives
Specific Outcome	2.3	Monitor performance of marketing staff against targets
Specific Outcome	2.4	Provide feedback on performance
Specific Outcome	2.5	Take corrective action as needed

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| 3. | Title | Develop, implement and manage a project / activity plan |
| Specific Outcome | 3.1 | Evaluate proposals and select preferred option |
| Specific Outcome | 3.2 | Conceptualise plan |
| Specific Outcome | 3.3 | Delegate tasks |
| Specific Outcome | 3.4 | Track project |
| 4. | Title | Implement a generic communication strategy |
| Specific Outcome | 4.1 | Identify and explain a generic communications model |
| Specific Outcome | 4.2 | Analyse, interpret and implement a generic communication strategy |
| 5. | Title | Identify product features, advantages and benefits to the customer |
| Specific Outcome | 5.1 | Identify needs of the customer |
| Specific Outcome | 5.2 | Present features, advantages and benefits to the customer |
| Specific Outcome | 5.3 | Demonstrate features, advantages and benefits |
| 6. | Title | Provide product training to others in the organisation |
| Specific Outcome | 6.1 | Establish an environment conducive to learning and development needs |
| Specific Outcome | 6.2 | Implement the product training activities |
| 7. | Title | Close a deal with a customer |
| Specific Outcome | 7.1 | Apply personal selling skills to sell products or services |
| Specific Outcome | 7.2 | Apply closing techniques to sell products or services |
| 8. | Title | Identify brand mix elements |
| Specific Outcome | 8.1 | Describe factors influencing branding |
| Specific Outcome | 8.2 | Explain brand familiarity |
| 9. | Title | Identify financial implications for making decisions |
| Specific Outcome | 9.1 | Evaluate financial statements against reporting requirements. |
| Specific Outcome | 9.2 | Apply financial analysis tools to interpret and report on financial implications |

10.	Title	Integrate marketing plans with business process
Specific Outcome	10.1	Monitor the marketing environment and determine variables for marketing activities
Specific Outcome	10.2	Distinguish the role of marketing research and marketing information systems in investigating and understanding the operations of the market place
Specific Outcome	10.3	Distinguish characteristics of major markets
Specific Outcome	10.4	Identify influences on consumer behaviour in relation to marketing activities
11.	Title	Coach others on principles of marketing in an organisation
Specific Outcome	11.1	Describe marketing principles and ethics to others
Specific Outcome	11.2	Develop and implement a coaching / monitoring plan
Specific Outcome	11.3	Develop and implement a monitoring programme
Specific Outcome	11.4	Monitor events of a "marketing culture" in the organisation
12.	Title	Monitor handling of customers by frontline customer service
Specific Outcome	12.1	Monitor interaction between customer service providers and the customer
Specific Outcome	34.2	Monitor the customer's satisfaction
Specific Outcome	34.3	Monitor key performance areas
13.	Title	Manage customer requirements and needs and implement action plans
Specific Outcome	13.1	Listen to and interpret customer needs
Specific Outcome	13.2	Describe action plan
Specific Outcome	13.3	Implement action plan to meet customer's needs
Specific Outcome	13.4	Track and measure the action plan to its completion
14.	Title	Identify and manage areas of customer service impact
Specific Outcome	14.1	Identify "touch points" of customers
Specific Outcome	14.2	Determine solutions in areas of customer service
Specific Outcome	14.3	Action change or improve areas of customer service
15.	Title	Present data to stakeholders
Specific Outcome	15.1	Develop the presentation of data to stakeholders
Specific Outcome	15.2	Present data to stakeholders

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| 16. | Title | Analyse and interpret data and marketing information |
| Specific Outcome | 16.1 | Analyse data and marketing information |
| Specific Outcome | 16.2 | Interpret data and marketing information |
| | | |
| 17. | Title | Develop marketing strategies in line with portfolio strategy. |
| Specific Outcome | 17.1 | Identify and assess product positioning. |
| Specific Outcome | 17.2 | Develop product and packaging or total product offering strategy. |
| Specific Outcome | 17.3 | Identify and develop pricing range and strategy. |
| Specific Outcome | 17.4 | Identify and develop marketing communications strategy. |
| Specific Outcome | 17.5 | Develop and align promotional activities and strategies. |
| Specific Outcome | 17.6 | Identify objectives distribution. |
| | | |
| 18. | Title | Develop and implement marketing plan in line with marketing strategy. |
| Specific Outcome | 18.1 | Identify and manage product and packaging changes (new or existing) |
| Specific Outcome | 18.2 | Implement and monitor pricing plan. |
| Specific Outcome | 18.3 | Develop and implement media plan. |
| Specific Outcome | 18.4 | Develop and implement promotional plan. |
| Specific Outcome | 18.5 | Develop and implement innovation plan. |
| Specific Outcome | 18.6 | Manage product profitability. |

No. 1213

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**NATIONAL FIRST DEGREE IN MARKETING MANAGEMENT NQF LEVEL 6**

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	6
Credit:	360
Issue date:	31 August 2001
Review date:	01 September 2003

Rationale of the qualification

The National First Degree in Marketing Management: Level 6 is designed to meet the needs of those learners who want to progress in the field of Marketing and will assist those who make Marketing Management their chosen career path. The qualification in Marketing Management offers scope for a large variety of talents, displayed by individuals of diverse backgrounds, cultures, and of either gender.

The qualification in marketing can be followed in virtually every sector, i.e. business-to-business marketing, i.e. products or services sold to other businesses; services marketing, i.e. education, real estate, travel and tourism, legal services, etc; fast moving consumer goods, i.e. products people need and use every day; financial services, i.e. banking and insurance.

At the higher levels the Marketing profession needs a set of unit standards against which to align and measure it self.

The National First Degree in Marketing Management will provide and offer the skills, knowledge and understanding of marketing that are essential for analysis of market conditions, development of marketing strategies, product and brand development, pricing, distribution (local and international), integrated marketing communication (including advertising, promotions and public relations) and interaction with the customer (through selling and customer service).

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Marketing Managers
- Brand Managers
- Brand Assistants
- Category Managers
- Marketing Directors
- Marketing Assistants
- Product Managers

This qualification will help the learner at Level 6 to get the requirements of such a qualification, namely, the general knowledge and understanding of business functions as well as a detailed practical understanding of Marketing Management.

The qualification is structured in such a way that exposes individuals to a set of core competences to enable them to function in this role. The electives will provide for more special competence in the area of Marketing Management. The qualification will also promote the notion of life-long learning.

Purpose of the qualification

Learners acquiring this qualification would be operating in an advanced environment of Marketing Management and will be more involved in the development, enhancement and growth of Marketing Management Technologies and practice. Learners will be learning around areas of Strategy, Customer Relations and Marketing Principles. Learners will also be involved with core issues of Customer Management, Marketing Communications and Marketing Research but will be furthering their specialisation Marketing Management.

Access to the Qualification

As this is a unit standard based qualification, any learner who is competent in the unit standard as required by the core, fundamental and elective components stipulated in the qualification, will have free access to the qualification.

Learning assumed to be in place

Learners accessing this qualification will have demonstrated competence against the standards in the Diploma Marketing Communication or Marketing Research or Marketing Management or Customer Management or equivalent at NQF Level 5.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Articulate a vision and develop a strategic plan to meet the vision.
- Monitor and review activity plans and the performance levels of marketers and service providers.
- Manage all aspects of a communications project and review its effectiveness.
- Assess the sales environment in order to present a range of products and services to meet objectives.
- Identify and manage innovation opportunities and processes.
- Determine, co-ordinate and monitor brand mix decisions and elements.
- Integrate and promote marketing principles, including ethics policies throughout the organization.

- Formulate, design, implement, service delivery systems and processes.
- Measure and analyse customer service delivery systems and processes.
- Identify, design, implements, measure and analyse customer service levels.
- Establish and determine research requirements and design and recommend a research brief.
- Develop, monitor and manage portfolio communication and marketing mix strategies.
- Develop and write portfolio strategic plan to meet requirements.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The articulation of vision into strategic marketing objectives and strategies then monitoring activity plans to meet objectives.
- Performance criteria in terms of setting, collecting, comparing and providing feedback on performance.
- Marketing Communications projects, their identification, evaluation, selection, management and review.
- A range of products and services and their presentation in line with objectives and time frames.
- Innovation as an important part of marketing and its successful implementation in an organisation.
- Brand mix and the role variables and brand mix decision have on outcomes.
- Marketing principles and ethics and the importance of promoting and integrating these into marketing policy.
- Customer service levels, measurement and analysis and the design and implementation of customer service delivery systems.
- Research requirement, their establishment and systems and the design of a research brief.
- Marketing portfolio management including portfolio communications strategy, marketing, mix and strategic plans.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Marketing Management qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Marketing Management industry, learners may also be able to follow a career in

- Brand Management
- Product Management
- Marketing Communications
- Marketing Research
- Customer Management
- Sales
- Customer Service
- Direct marketing
- General Marketing
- Data Base Marketing
- Direct Selling
- Advertising
- Promotions
- Public Relations

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector eg. EMCG; Retail, Wholesale, Motor; Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc

A learner could follow a career in the Marketing Management field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 6	Cr	Total
Fundamental	Present a strategy using creative means to a range of stakeholders	60	60
	Interpret historical data and present a range of formula to influence decision making	60	60
			120
Core	Develop a strategic plan	15	15
	Monitor and review activity plan	7	7
	Monitor performance of marketers and service providers	10	10
	Manage a communications projects	15	15
	Present a range of products or services	15	15
	Identify innovation opportunities	15	15
	Integrate brand mix elements	15	15
	Promote principles of Marketing throughout organisations	8	8
	Integrate ethics policy into marketing policy	6	6
	Measure and analyse customer service level	12	12
	Formulate, design and implement customer service delivery systems and processes	8	8
	Conceptualise and research requirements	10	10
	Design a research brief	10	10
			146
Elective	Monitor and manage portfolio communication strategy	32	32
	Develop and manage portfolio marketing mix strategy	32	32
	Develop portfolio strategic plan	30	30
			96

UNIT STANDARDS IN NATIONAL FIRST DEGREE IN MARKETING MANAGEMENT NQF LEVEL 6

UNIT STANDARDS ON NQF LEVEL 6

Core

1. Title Develop a strategic plan
2. Title Monitor and review activity plan
3. Title Monitor performance of marketers and service providers
4. Title Manage a communications projects
5. Title Present a range of products or services
6. Title Identify innovation opportunities
7. Title Integrate brand mix elements
8. Title Promote principles of Marketing throughout organisations
9. Title Integrate ethics policy into marketing policy
10. Title Measure and analyse customer service level
11. Title Formulate, design and implement customer service delivery systems and processes
12. Title Conceptualise and research requirements
13. Title Design a research brief

Elective

14. Title Monitor and manage portfolio communication strategy
15. Title Develop and manage portfolio marketing mix strategy
16. Title Develop portfolio strategic plan

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL FIRST DEGREE IN MARKETING MANAGEMENT NQF LEVEL 6

UNIT STANDARDS ON NQF LEVEL 6

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| 1. | Title | Develop a strategic plan. |
| Specific Outcome | 1.1 | Articulate the vision in a marketing context |
| Specific Outcome | 1.2 | Analyse possible long term trends with macro, micro, market and competitor environments |
| Specific Outcome | 1.3 | Develop strategic marketing objectives |
| Specific Outcome | 1.4 | Develop alternative long-term strategies |
| Specific Outcome | 1.5 | Evaluate and recommend "best " strategy |

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| 2. | Title | Monitor and review activity plan |
| Specific Outcome | 2.1 | Check activities to be performed in activity plans |
| Specific Outcome | 2.2 | Evaluate results |
| Specific Outcome | 2.3 | Develop options to counteract variances |
| Specific Outcome | 2.4 | Evaluation of options |
| Specific Outcome | 2.5 | Made recommendations |
| 3. | Title | Monitor performance of marketers and service providers |
| Specific Outcome | 3.1 | Set performance criteria |
| Specific Outcome | 3.2 | Collect relevant data |
| Specific Outcome | 3.3 | Compare actual to standard |
| Specific Outcome | 3.4 | Give feedback to marketers and service providers |
| 4. | Title | Manage a communications projects |
| Specific Outcome | 4.1 | Identify, evaluate and select the communications methods and format |
| Specific Outcome | 4.2 | Manage the communications project implementation |
| Specific Outcome | 4.3 | Review the communications project effectiveness |
| 5. | Title | Present a range of products or services |
| Specific Outcome | 5.1 | Establish objectives for presenting a range of products or services |
| Specific Outcome | 5.2 | Assess the internal and external sales environment |
| Specific Outcome | 5.3 | Present a range of products or services |
| 6. | Title | Identify innovation opportunities |
| Specific Outcome | 6.1 | Identify and examine processes and methods to facilitate innovation within an organisation |
| Specific Outcome | 6.2 | Lead and manage innovation processes within an organisation |
| 7. | Title | Integrate brand mix elements |
| Specific Outcome | 7.1 | Determine variables of the brand mix |
| Specific Outcome | 7.2 | Confirm, co-ordinate and monitor brand mix decisions |
| 8. | Title | Promote principles of Marketing throughout organisations |
| Specific Outcome | 8.1 | Design and develop appropriate programme to achieve desired culture |
| Specific Outcome | 8.2 | Implement programme to achieve desired culture |
| Specific Outcome | 8.3 | Evaluate programme |

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| 9. | Title | | Integrate ethics policy into marketing policy |
| | Specific Outcome | 9.1 | Ensure that ethics are integrated into the marketing programme |
| | Specific Outcome | 9.2 | Evaluate marketing ethics practices |
| | Specific Outcome | 9.3 | Correct unethical marketing practices |
| 10. | Title | | Measure and analyse customer service level |
| | Specific Outcome | 10.1 | Identify factors which influence customer service and perceptions |
| | Specific Outcome | 10.2 | Design methodologies to measure factors and perceptions of customer service |
| | Specific Outcome | 10.3 | Implement customer service measurement processes and collect data |
| | Specific Outcome | 10.4 | Analyse measurement results of customer service levels |
| 11. | Title | | Formulate, design and implement customer service delivery systems and processes |
| | Specific Outcome | 11.1 | Developing and implementing an action plan to achieve desired service levels |
| | Specific Outcome | 11.2 | Monitor progress and effectiveness of action plans implemented |
| 12. | Title | | Conceptualise and research requirements |
| | Specific Outcome | 12.1 | Establish research requirements |
| | Specific Outcome | 12.2 | Determine research requirement systems |
| 13. | Title | | Design a research brief |
| | Specific Outcome | 13.1 | Assess and recommend a research brief |
| | Specific Outcome | 13.2 | Design a research brief to optimise results. |
| 14. | Title | | Monitor and manage portfolio communication strategy. |
| | Specific Outcome | 14.1 | Agree portfolio expenditure. |
| | Specific Outcome | 14.2 | Approve media strategy. |
| | Specific Outcome | 14.3 | Monitor and review advertising development. |
| | Specific Outcome | 14.4 | Manage agency relationship. |
| | Specific Outcome | 14.5 | Develop consumer insights. |
| | Specific Outcome | 14.6 | Monitor brand positioning within the portfolio. |

15. Title Develop and manage portfolio marketing mix strategy.
- Specific Outcome 15.1 Segment the category.
Specific Outcome 15.2 Access portfolio and individual brand performance.
Specific Outcome 15.3 Identify and develop category / portfolio innovation opportunities.
Specific Outcome 15.4 Monitor product and packaging development.
Specific Outcome 15.5 Review pricing activity.
Specific Outcome 15.6 Manage project work.
Specific Outcome 15.7 Monitor portfolio profitability.
16. Title Develop portfolio strategic plan.
- Specific Outcome 16.1 Develop and agree portfolio strategic objectives.
Specific Outcome 16.2 Assess and recommend strategic options.
Specific Outcome 16.3 Write portfolio strategic plan.

No. 1214

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**NATIONAL SECOND DEGREE IN MARKETING MANAGEMENT NQF LEVEL 7**

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	7
Credit:	514
Issue date:	31 August 2001
Review date:	01 September 2003

Rationale of the qualification

The National Second Degree in Marketing Management: Level 7 is designed to meet the needs of those learners who want to progress in the field of Marketing and will assist those who make Marketing Management their chosen career path. The qualification in Marketing Management offers scope for a large variety of talents, displayed by individuals of diverse backgrounds, cultures, and of either gender.

The qualification in marketing can be followed in virtually every sector, i.e. business-to-business marketing, i.e. products or services sold to other businesses; services marketing, i.e. education, real estate, travel and tourism, legal services, etc; fast moving consumer goods, i.e. products people need and use every day; financial services, i.e. banking and insurance.

At the higher levels the Marketing profession needs a set of unit standards against which to align and measure it self.

The National Second Degree in Marketing Management will provide and offer the skills, knowledge and understanding of marketing that are essential for analysis of market conditions, development of marketing strategies, product and brand development, pricing, distribution (local and international), integrated marketing communication (including advertising, promotions and public relations) and interaction with the customer (through selling and customer service).

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Marketing Managers
- Brand Managers
- Brand Assistants
- Category Managers
- Marketing Directors
- Marketing Assistants
- Product Managers

This qualification will help the learner at Level 7 to get the requirements of such a qualification, namely, the general knowledge and understanding of business functions as well as a detailed practical understanding of Marketing Management.

The qualification is structured in such a way that exposes individuals to a set of core competences to enable them to function in this role. The electives will provide for more special competence in the area of Marketing Management. The qualification will also promote the notion of life-long learning.

Purpose of the qualification

This higher degree will allow learners to operate at a strategic and conceptual level in designing and strategising new technologies, methodologies and techniques of furthering the purposes and benefits of Marketing Management.

Access to the Qualification

As this is a unit standard based qualification, any learner who is competent in the unit standard as required by the core, fundamental and elective components stipulated in the qualification, will have free access to the qualification.

Learning assumed to be in place

Learners accessing this qualification will have demonstrated competence against the standards in the National Degree - Marketing Management or equivalent NQF 6.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Analyse and evaluate global trends and develop a vision for an organization.
- Develop a monitoring system and evaluate and monitor a strategic marketing plan.
- Monitor and control all aspects of an internal or external marketing unit.
- Interpret a brief and develop a public relations and marketing campaign.
- Develop, plan and review alternative marketing opportunities.
- Assess current marketing culture and set marketing culture and ethics objectives to instill a marketing culture and ethics in all stakeholder groups.
- Create and maintain a positive culture of customer service in the supply chain and conceptualise innovative customer service strategies.
- Develop, assess and write research policies and sponsor research activities for market research projects.
- Set marketing policy to meet business strategic plan and co-ordinate position and synergize the strategic marketing plan.
- Manage specialized areas in Marketing Management.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The overall process for developing an organisation vision.
- The strategic marketing plans development and evaluation.
- The process for starting and structuring a marketing unit and the application of financial plans and controls.
- Public relations and marketing campaigns are defined and interpreted strategies developed to meet requirements.
- The involvement of all stakeholders to develop alternative opportunities.
- Marketing culture establishment in all stakeholder groups.
- Marketing best practice ethics are established, set and implemented within given resource constraints.
- Customer service culture is developed and innovative systems conceptualised to meet objectives.
- Research projects are identified, sponsored and monitored.
- Research policies are developed, agreed and recommended and assist organisation to meet its objectives.
- Marketing policy is designed, developed, implemented, monitored and reviewed to meet strategic business plan.
- Markets are analysed, segmented according to specified criteria and performance standards set and the marketing strategy positioned.
- All specialised areas in marketing are identified, explained and managed and plans made to meet objectives.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Marketing Management qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Marketing Management industry, learners may also be able to carry out careers in

- Brand Management
- Product Management
- Marketing Communications
- Marketing Research
- Customer Management
- Sales
- Customer Service
- Direct marketing
- General Marketing
- Data Base Marketing
- Direct Selling
- Advertising
- Promotions
- Public Relations

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector e.g. EMCG; Retail, Wholesale, Motor; Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc

A learner could follow a career in the Marketing Management field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 7	Cr	Total
Fundamental	Present a national strategy benchmarked to add value internationally	70	70
	Establish scenarios of best practice	70	70 60
			140
Core	Develop a vision for an organisation	20	20
	Monitor and evaluate a strategic marketing plan	20	20
	Manage a Marketing Unit (Internal or External)	60	60
	Develop a public relations and marketing campaign	20	20
	Generate alternative opportunities	10	10
	Instil Marketing culture in all stakeholder groups	8	8
	Set Marketing Ethics Policy	8	8
	Create a culture of customer service in the supply chain	20	20
	Conceptualise innovative customer service systems and strategies	30	30
	Sponsor research projects	10	10
	Set research policy	10	10
			216
Elective	Set marketing policy to meet business strategic plan	40	40
	Co-ordinate and synergize strategic marketing plan	40	40
	Position a market strategy	40	40
	Manage specialised areas in marketing management	40	40
			160

UNIT STANDARDS IN NATIONAL SECOND DEGREE IN MARKETING MANAGEMENT NQF LEVEL 7

UNIT STANDARDS ON NQF LEVEL 7

Core

1. Title Develop a vision for an organisation
2. Title Monitor and evaluate a strategic marketing plan
3. Title Manage a Marketing Unit (Internal or External)
4. Title Develop a public relations and marketing campaign
5. Title Generate alternative opportunities
6. Title Instil Marketing culture in all stakeholder groups
7. Title Set Marketing Ethics Policy
8. Title Create a culture of customer service in the supply chain
9. Title Conceptualise innovative customer service systems and strategies
10. Title Sponsor research projects
11. Title Set research policy

Elective

12. Title Set marketing policy to meet business strategic plan
13. Title Co-ordinate and synergize strategic marketing plan
14. Title Position a market strategy
15. Title Manage specialised areas in marketing management

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL SECOND DEGREE IN MARKETING MANAGEMENT NQF LEVEL 7

UNIT STANDARDS ON NQF LEVEL 7

1. Title Develop a strategic plan.
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| Specific Outcome | 1.1 | Articulate the vision in a marketing context |
| Specific Outcome | 1.2 | Analyse possible long term trends with macro, micro, market and competitor environments |
| Specific Outcome | 1.3 | Develop strategic marketing objectives |
| Specific Outcome | 1.4 | Develop alternative long-term strategies |
| Specific Outcome | 1.5 | Evaluate and recommend "best " strategy |

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| 2. | Title | Monitor and review activity plan |
| Specific Outcome | 2.1 | Check activities to be performed in activity plans |
| Specific Outcome | 2.2 | Evaluate results |
| Specific Outcome | 2.3 | Develop options to counteract variances |
| Specific Outcome | 2.4 | Evaluation of options |
| Specific Outcome | 2.5 | Made recommendations |
| 3. | Title | Monitor performance of marketers and service providers |
| Specific Outcome | 3.1 | Set performance criteria |
| Specific Outcome | 3.2 | Collect relevant data |
| Specific Outcome | 3.3 | Compare actual to standard |
| Specific Outcome | 3.4 | Give feedback to marketers and service providers |
| 4. | Title | Manage a communications projects |
| Specific Outcome | 4.1 | Identify, evaluate and select the communications methods and format |
| Specific Outcome | 4.2 | Manage the communications project implementation |
| Specific Outcome | 4.3 | Review the communications project effectiveness |
| 5. | Title | Present a range of products or services |
| Specific Outcome | 5.1 | Establish objectives for presenting a range of products or services |
| Specific Outcome | 5.2 | Assess the internal and external sales environment |
| Specific Outcome | 5.3 | Present a range of products or services |
| 6. | Title | Identify innovation opportunities |
| Specific Outcome | 6.1 | Identify and examine processes and methods to facilitate innovation within an organisation |
| Specific Outcome | 6.2 | Lead and manage innovation processes within an organisation |
| 7. | Title | Integrate brand mix elements |
| Specific Outcome | 7.1 | Determine variables of the brand mix |
| Specific Outcome | 7.2 | Confirm, co-ordinate and monitor brand mix decisions |
| 8. | Title | Promote principles of Marketing throughout organisations |
| Specific Outcome | 8.1 | Design and develop appropriate programme to achieve desired culture |
| Specific Outcome | 8.2 | Implement programme to achieve desired culture |
| Specific Outcome | 8.3 | Evaluate programme |

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|-------------------|-------|---|
| 9. | Title | Integrate ethics policy into marketing policy |
| Specific Outcome | 9.1 | Ensure that ethics are integrated into the marketing programme |
| Specific Outcome | 9.2 | Evaluate marketing ethics practices |
| Specific Outcome | 9.3 | Correct unethical marketing practices |
| 10. | Title | Measure and analyse customer service level |
| Specific Outcome | 10.1 | Identify factors which influence customer service and perceptions |
| Specific Outcome | 10.2 | Design methodologies to measure factors and perceptions of customer service |
| Specific Outcome | 10.3 | Implement customer service measurement processes and collect data |
| Specific Outcome | 10.4 | Analyse measurement results of customer service levels |
| 11. | Title | Formulate, design and implement customer service delivery systems and processes |
| Specific Outcome | 11.1 | Developing and implementing an action plan to achieve desired service levels |
| Specific Outcome | 11.2 | Monitor progress and effectiveness of action plans implemented |
| 12. | Title | Set marketing policy to meet business strategic plan |
| Specific Outcome | 12.1 | Design and develop marketing policies |
| Specific Outcome | 12.2 | Implement marketing policies |
| Specific Outcome | 12.3 | Monitor and review marketing policies |
| 13. | Title | Co-ordinate and synergize strategic marketing plan |
| Specific Outcome | 13.1 | Define and analyse markets for new business opportunities |
| Specific Outcome | 13.2 | Segment and target specific markets |
| Specific Outcomes | 13.3 | Analyse and explain competitive situations |
| Specific Outcome | 13.4 | Setting performance standards |
| 14. | Title | Position a market strategy |
| Specific Outcome | 14.1 | Determine and establish buyers perceptions, positions and behaviour |
| Specific Outcome | 14.2 | Monitor positioning of market strategy |
| Specific Outcome | 14.3 | Evaluate and review positioning of market strategy |

15.	Title	Manage specialised areas in marketing management
Specific Outcome	15.1	Manage consumer marketing management
Specific Outcome	15.2	Manage business-to-business marketing management
Specific Outcome	15.3	Manage marketing management for non-profit organisations
Specific Outcome	15.4	Manage marketing management for service industry

No. 1215

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY



NATIONAL CERTIFICATE IN MARKETING COMMUNICATIONS NQF LEVEL 4

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	4
Credit:	134
Issue date:	31 August 2001
Review date:	01 September 2003

Rational of the qualification

The National Qualification in Marketing Communications: Level 4 is designed to meet the needs of those learners who enter the field of Marketing Communications. The whole marketing field per se is a key business function necessary for the success of any organisation, both strategically and operationally. The qualification is inextricably linked to the Standard Generating Body's (SGB's), definition of Marketing, "to identify, anticipate and satisfy current and future consumer and customer expectations, needs and problems by facilitating and consummating exchange to achieve targeted levels of profitability and / or value in an accountable and socially responsible manner. The Marketing Communications National Certificate at NQF Level 4 will provide a broad knowledge and skills needed in the industry and to progress along a career path for learners who

- Were previously disadvantaged or who were unable to complete their schooling and were therefore denied access to Further Education and Training.
- Have worked in Marketing Communications for many years, but have no formal qualification in Marketing Communications.
- Wish to extend their range of skills and knowledge of the industry so that they can become knowledge workers in Marketing Communications.

The National Certificate in Marketing Communications: Level 4 allows the learner to work towards a nationally recognised whole qualification. The qualification will allow both those in formal education and those already employed in marketing organisations access, due to its flexibility. It aims to develop individuals who are informed and skilled in Marketing Communications.

The qualification has building blocks that can be developed further and will lead to a more defined Marketing Communications career path at NQF Level 5. It also focuses on the skills, knowledge, values and attitudes required to progress further. The intention is

- To promote the development of knowledge and skills that are required in all sub-sectors of marketing.
- To release the potential of people.
- To provide opportunities for people to move up the value chain.

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Creative Directors
- Account Executives
- Media Planners
- Marketing Managers
- Marketing Traffic Controllers
- Copywriters
- Marketing Communication Specialists

The National Certificate in Marketing Communications: Level 4 should produce knowledgeable, skilled market communicators who are able to contribute to improved productivity and efficiency within the marketing industry. It should provide the means for current individuals in the Marketing Communications field to receive recognition of prior learning and to upgrade their skills and knowledge base. The qualification is structured in such a way that exposes individuals to a set of core competences to give a broad understanding of marketing and the electives, which will allow for a specific competence in Marketing Communications. It will also promote the notion of life-long learning.

Purpose of the qualification

Any individuals who are or wish to be involved in Marketing Communications will access this qualification. It also serves as the entry qualification into Marketing Communications Qualifications in the higher band of learning. This qualification will be registered at NQF Level 4. This qualification is also related to other qualifications such as the National Certificate in Marketing Research, the National Certificate in Customer Management and the National Certificate in Marketing Management where all four of these qualifications will share fundamental competence as well as core competence. Portability across all four of these National Certificates are therefore ensured.

Access to the Qualification

As this is a "complete and whole" qualification, any learner who can provide guidance of the learning assumed to be in place, has open access to this qualification.

Learning assumed to be in place

Learners accessing this qualification will have demonstrated competence in communicating verbally and in writing and computer technology at Level 3 on the NQF or equivalent.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Work with other members of a marketing team to meet performance standards and objectives.
- Identify, assess, utilize and account for marketing expertise and resources in order to meet marketing objectives and report on results.
- Identify prospective customers and their needs and present the correct features, advantages and benefits to enable customers to make informed buying decisions.
- Demonstrate an understanding of product positioning, product life cycles, market segmentation, marketing mix and the competitive environment for products and services.
- Demonstrate an understanding for and comply with legislation, rules, activities and transactions.
- Identify and evaluate brand product and service promotional opportunities and co-ordinate and evaluate promotional activities and results.
- Comply with organisational ethics by applying marketing principles, concepts and culture through the identification of all stakeholders and their relationships.
- Liase with a range of customers ad identifying and solving customers complaints and problems.
- Identify, monitor and review marketing information and gather and process data for research and information purposes.
- Demonstrate an understanding of issues around Marketing, ethical and legal issues pertaining to marketing and Marketing Communications.
- Monitor and control an inter-departmental traffic system ensuring the client's brief is met and communication between client, providers and organisation is controlled.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The importance of working together and communicating with all stakeholders in order to meet marketing requirements and objectives.
- Giving identified customers the correct information (features, advantages and benefits) to enable them to make informed buying decisions.
- The legal and ethical requirements in the marketing field.
- Product positioning, target markets and the competitive environment.
- Promotions which deal with either brand, product or service.
- The importance of knowing the internal and external stakeholders and believing in marketing as a profession.
- The methods, techniques and principles of dealing with customers and clients to meet their needs.
- Being able to source expertise and resources to assist with information gathering and processing.
- Defining and explaining the concept of Marketing Communications and integrated Marketing Communications.
- Identifying and interpreting legal, regulatory, social, ethical and cultural issues in Marketing Communications.
- Describing and interpreting issues and concepts pertaining to creative principles of Marketing Communications.
- Processing, controlling and maintaining an inter-departmental traffic system between all stakeholders.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, and reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Marketing Communications Qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Marketing Communications industry, learners may also be able to enter careers in

- Advertising
- Promotion
- Public Relations
- General Marketing
- Customer Services
- Direct Marketing
- Direct Selling
- Sales
- Marketing Research
- Marketing Consultancy
- Merchandising
- Marketing Management

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector e.g. FMCG; Retail, Wholesale, Motor; Insurance etc
3. Learners can also become even more specialised such as Call Center, Internet Marketing; Point of Sale etc.

A learner could follow a career in the Marketing Communications field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 4	Cr	Total
Fundamental	Communicate verbally and in writing to a range of stakeholders	20	20
	Work with a range of software packages to generate, maintain and manipulate data	20	20
			40
Core	Work as a member of a marketing team	5	5
	Meet marketing performance standards	4	4
	Identify and utilise marketing resources to meet objectives	4	4
	Describe features, advantages and benefits of a range of products	6	6
	Identify customers of the business	4	4
	Demonstrate an understanding of product positioning	4	4
	Comply with legal requirements and understand implications	4	4
	Deal with brand, product and service promotions	4	4
	Demonstrate an understanding of the target market	4	4
	Demonstrate an understanding of the competitive environment	4	4
	Instill in myself a personal marketing culture	4	4
	Comply with organisational ethics	4	4
	Identify internal and external stakeholders	4	4
	Liaise with a range of customers of a business	4	4
	Handle a range of customer complaints	4	4
	Identify expertise and resources	3	3
	Monitor marketing information flow and collect and process marketing data	4	4
			70
Elective	Understand and define the nature, role and history of marketing communication	3	3
	Understand ethical, social, cultural and legal issues in marketing communication	3	3
	Understand and define integrated marketing communications and its role	6	6
	Understand the creative principles of marketing communications	4	4
	Operate an inter-departmental traffic system	8	8
			24

UNIT STANDARDS IN NATIONAL CERTIFICATE IN MARKETING COMMUNICATIONS NQF LEVEL 4

UNIT STANDARDS ON NQF LEVEL 4

Core

1. Title Work as a member of a marketing team
2. Title Meet marketing performance standards
3. Title Identify and utilise marketing resources to meet objectives
4. Title Describe features, advantages and benefits of a range of products
5. Title Identify customers of the business
6. Title Demonstrate an understanding of product positioning
7. Title Comply with legal requirements and understand implications
8. Title Deal with brand, product and service promotions
9. Title Demonstrate an understanding of the target market
10. Title Demonstrate an understanding of the competitive environment
11. Title Instill in myself a personal marketing culture
12. Title Comply with organisational ethics
13. Title Identify internal and external stakeholders
14. Title Liaise with a range of customers of a business
15. Title Handle a range of customer complaints
16. Title Identify expertise and resources
17. Title Monitor marketing information flow and collect and process marketing data

Elective

18. Title Understand and define the nature, role and history of marketing communication
19. Title Understand ethical, social, cultural and legal issues in marketing communication
20. Title Understand and define integrated marketing communications and its role
21. Title Understand the creative principles of marketing communications
22. Title Operate an inter-departmental traffic system

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL CERTIFICATE IN MARKETING COMMUNICATIONS NQF LEVEL 4

UNIT STANDARDS ON NQF LEVEL 4

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| 1. | Title | Work as a member of a marketing team |
| Specific Outcome | 1.1 | Communicate with all relevant stakeholders to enhance teamwork |
| Specific Outcome | 1.2 | Report on team progress to appropriate authority and team |
| Specific Outcome | 1.3 | Display tendencies to work with others as a member of a marketing team |
| Specific Outcome | 1.4 | Handle and resolve areas of conflict |

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| 2. | Title | Meet marketing performance standards |
| Specific Outcome | 2.1 | Demonstrate an understanding of marketing performance standards |
| Specific Outcome | 2.2 | Follow instructions to meet standards |
| Specific Outcome | 2.3 | Meet marketing objectives |
| Specific Outcome | 2.4 | Report on marketing objectives progress |
| 3. | Title | Identify and utilise marketing resources to meet objectives |
| Specific Outcome | 3.1 | Identify and assess marketing resources required |
| Specific Outcome | 3.2 | Utilise marketing resources to meet objectives |
| Specific Outcome | 3.3 | Account for marketing resources |
| 4. | Title | Describe features, advantages and benefits of a range of products |
| Specific Outcome | 4.1 | Determine and communicate product features, advantages and benefits |
| Specific Outcome | 4.2 | Describe physical specifications, features, advantages and benefits |
| 5. | Title | Identify customers of the business |
| Specific Outcome | 5.1 | Identify prospective customers and establish their needs |
| Specific Outcome | 5.2 | Establish and build the customer base |
| 6. | Title | Demonstrate an understanding of product positioning |
| Specific Outcome | 6.1 | Describe and explain product positioning strategies |
| Specific Outcome | 6.2 | Position the product in relation to the market |
| Specific Outcome | 6.3 | Explain and describe product life cycles |
| 7. | Title | Comply with legal requirements and understand implications |
| Specific Outcome | 7.1 | Use and interpret legal documentation to ensure compliance with legal and organisational requirements |
| Specific Outcome | 7.2 | Comply with legislation and rules which regulate the conduct in a marketing business |
| Specific Outcome | 7.3 | Apply the various aspects of marketing law and statutory requirements applicable to marketing transactions |
| 8. | Title | Deal with brand, product, and service promotions |
| Specific Outcome | 8.1 | Evaluate brand, product and service promotion opportunities |
| Specific Outcome | 8.2 | Co-ordinate brand, product and sales promotions |
| Specific Outcome | 8.3 | Evaluate brand, product and service promotions |

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| 9. | Title | Demonstrate an understanding of the target market |
| Specific Outcome | 9.1 | Describe market segmentation and market segmentation processes |
| Specific Outcome | 9.2 | Explain positioning strategies for chosen segments |
| Specific Outcome | 9.3 | Explain market segmentation in relation to the marketing mix |
| 10. | Title | Demonstrate an understanding of the competitive environment |
| Specific Outcome | 10.1 | Explain the nature and the extent of the competitive environment |
| Specific Outcome | 10.2 | Retain the competitive environment of products or services |
| 11. | Title | Instill in myself a personal marketing culture |
| Specific Outcome | 11.1 | Identify and define what marketing is |
| Specific Outcome | 11.2 | Identify marketing principles and concepts |
| Specific Outcome | 11.3 | Identify the benefits of instilling in self a marketing culture |
| Specific outcome | 11.4 | Persuade others of the benefits of a marketing culture |
| 12. | Title | Instill in myself a personal marketing culture |
| Specific Outcome | 12.1 | Describe the code of conduct and ethical issues |
| Specific Outcome | 12.2 | Adhere to code of conduct |
| Specific Outcome | 12.3 | Identify and understand the ethical issues in the organisation |
| 13. | Title | Identify internal and external stakeholders |
| Specific Outcome | 13.1 | Identify internal and external stakeholders |
| Specific Outcome | 13.2 | Describe the stakeholders' relationship to each other |
| Specific Outcome | 13.3 | Initiate contact with a range of customers |
| 14. | Title | Liaise with a range of customers of a business |
| Specific Outcome | 14.1 | Initiate contact with a range of customers |
| Specific Outcome | 14.2 | Maintain contact with a range of customers |
| Specific Outcome | 14.3 | Administer contact with a range of customers |
| 15. | Title | Handle a range of customer complaints |
| Specific Outcome | 15.1 | Identify the customers problem |
| Specific Outcome | 15.2 | Commit to solving the customer's problem |
| Specific Outcome | 15.3 | Arrange correct planning and solution to the customer's problem |
| Specific Outcome | 15.4 | Communicate with all stakeholders |
| Specific Outcome | 15.5 | Provide Practical business solutions |

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| 16. | Title | Identify expertise and resources |
| Specific Outcome | 16.1 | Determine criteria for expertise and resources |
| Specific Outcome | 16.2 | Establish and record expertise and resources |
| Specific Outcome | 16.3 | Report on expertise and resources |
| 17. | Title | Monitor marketing information flow and collect and process marketing data |
| Specific Outcome | 17.1 | Identify marketing information flow needs |
| Specific Outcome | 17.2 | Monitor and review marketing information flow |
| Specific Outcome | 17.3 | Gather data for researching and information purposes |
| Specific Outcome | 17.4 | Process data for researching information purposes |
| 18. | Title | Demonstrate an understanding and define the nature, role and history of marketing communication |
| Specific Outcome | 18.1 | Define and explain marketing communications, marketing communications characteristics and objectives |
| Specific Outcome | 18.2 | Explain how marketing communications work and how it is classified |
| Specific Outcome | 18.3 | Define and explain persuasive communication |
| Specific Outcome | 18.4 | Identify and explain the role of marketing communications in the overall marketing process |
| Specific Outcome | 18.5 | Explain the history, development and functions of the South African marketing communications industry |
| 19. | Title | Demonstrate an understanding of ethical, social, cultural and legal issues in marketing communication |
| Specific Outcome | 19.1 | Identify and interpret regulatory issues in marketing communications |
| Specific Outcome | 19.2 | Identify and interpret social, ethical, and cultural issues in marketing communication |
| 20. | Title | Demonstrate an understanding of and define integrated marketing communications and its role |
| Specific outcome | 20.1 | Define integrated marketing communications |
| Specific Outcome | 20.2 | Define and explain the objectives of integrated marketing communications |
| Specific Outcome | 20.3 | Describe integrated marketing communications tools |

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| 21. | Title | Demonstrate an understanding of creative principles of marketing communications |
| Specific Outcome | 21.1 | Describe and explain the history and nature of copywriting |
| Specific Outcome | 21.2 | Describe and explain the practice of copywriting |
| Specific Outcome | 21.3 | Describe and interpret the characteristics and constraints of the various media |
| Specific Outcome | 21.4 | Describe and explain the nature and role of the various creative elements available |
| Specific Outcome | 21.5 | Describe and explain the creative philosophies of leading advertising agencies |
| 22. | Title | Operate an inter-departmental traffic system |
| Specific Outcome | 22.1 | Receive and interpret client's brief |
| Specific Outcome | 22.2 | Prepare and maintain job bags |
| Specific Outcome | 22.3 | Co-ordinate and schedule workflow |
| Specific Outcome | 22.4 | Control communication between client, provider and organisation |

No. 1216

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**NATIONAL DIPLOMA IN MARKETING COMMUNICATIONS NQF LEVEL 5**

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	5
Credit:	247
Issue date:	31 August 2001
Review date:	01 September 2003

Rationale of the qualification

The National Diploma in Marketing Communications: Level 5 is designed to meet the needs of those learners who are already involved in the field of Marketing Communications or who enter the field at a higher level. Learners recognise that marketing is an essential and key business function necessary for the success of any organisation, both strategically and operationally. The qualification is inextricably linked to the Standard Generating Body's (SGB's), definition of Marketing, "to identify, anticipate and satisfy current and future consumer and customer expectations, needs and problems by facilitating and consummating exchange to achieve targeted levels of profitability and / or value in an accountable and socially responsible manner.

This qualification also reflects the needs of the marketing sector both now and in the future: it gives accessibility and flexibility to the learner and to the employer. The level of flexibility is reflected in the multiple job roles and careers, organisational requirements and changing technological nature of marketing and at the same time it allows the individual to work towards a nationally recognised qualification

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Creative Directors
- Account Executives
- Media Planners
- Marketing Managers
- Marketing Traffic Controllers
- Copywriters
- Marketing Communication Specialists

The National Diploma in Marketing Communications is structured in such a way that it exposes learners to a broad set of core competences while the electives allow for special competence in Marketing Communications. It certainly promotes the notion of life-long learning.

Purpose of the qualification

Learners acquiring this qualification will have demonstrated competence at NQF Level 4 in the area of Marketing Communications or will have attained an equivalent qualification at that level. This qualification will be registered at NQF Level 5 on the National Qualifications Framework and learners will have acquired a range of fundamental, core and elective competence around the areas of Marketing Strategy, Marketing Customer Relations, Principles of Marketing, Marketing Communications, Marketing Management, Marketing Research and Customer Management. Learners will have also demonstrated competence against specialised outcomes in the area of Marketing Communications.

Access to the Qualification

As this is a unit standard based qualification, any learner who is competent in the unit standard as required by the core, fundamental and elective components stipulated in the qualification, will have free access to the qualification.

Learning assumed to be in place

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.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Conduct a marketing situational analysis while leading a team of Marketers and Service Providers.
- Develop, implement and manage a marketing related project and / or activity plan, and implement a generic marketing communications strategy.
- Present the features, advantages and benefits of products to customers so that a deal can be closed.
- Provide product training to others in the organisation and coach others on the principles of marketing in an organisation.
- Identify brand mix elements and financial implications for decision making.
- Integrate marketing plans with the business process.
- Monitor and control the handling of customers, customer needs and requirements and areas of customer service impact.
- Analyse and interpret marketing information and present marketing data to stakeholders.
- Co-ordinate and organize marketing communications production.
- Interpret, evaluate and buy media and manage a media campaign.
- Investigate, explain and apply marketing communications concepts and lateral thinking processes.
- Demonstrate an understanding of marketing communications roles, art direction, publishing and graphic design.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- Data gathering processes, its analysis and the drawing of conclusions and making recommendations.
- How to get the best results from a team of marketers or service providers by monitoring and rectifying performance.
- Project plans and their successful conclusion.
- Communications models and strategies and the elements and processes.
- Customer needs and their identification to enable the production and demonstration of features, advantages and benefits.
- Training and coaching environment establishment and implementation.
- Product and service selling methods, techniques and principles.
- Brand influences and familiarity factors.
- Financial statement analysis and evaluation.
- Marketing activities and the issues, roles and characteristics that affect them.
- Customer service providers and their interaction to establish satisfied customers by interpreting and meeting customer needs and all areas that impact on customer service levels.
- Marketing data, its analysis; interpretation and presentation to all stakeholders.
- Marketing Communications, processes and production, concepts and roles.
- Marketing media and how to plan, buy and evaluate this.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Marketing Communications Qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Marketing Communications industry, learners may also be able to follow a career in

- Advertising
- Promotion
- Public Relations
- General Marketing
- Customer Services
- Direct Marketing
- Direct Selling
- Sales
- Marketing Research
- Marketing Consultancy
- Merchandising
- Marketing Management

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector eg. FMCG; Retail, Wholesale, Motor; Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc

A learner could follow a career in the Marketing Communications field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 5	Cr	Total
Fundamental	Use a range of electronic media to sell an idea to a range of stakeholders	40	40
	Present data based on sound information technology practices	40	40
			80
Core	Conduct a marketing situational analysis	5	5
	Lead a team of marketers and service providers	10	10
	Develop, implement and manage a project / activity plan	5	5
	Implement a generic communication strategy	10	10
	Identify product features, advantages and benefits to the customer	10	10
	Provide product training to others in the organisation	10	10
	Close a deal with a customer	5	5
	Identify brand mix elements	8	8
	Identify financial implications for making decisions	8	4
	Integrate marketing plans with business process	6	6
	Coach others on principles of marketing in an organisation	5	5
	Monitor handling of customers by frontline customer service	6	6
	Manage customer requirements and needs and implement action plans	8	8
	Identify and manage areas of customer service impact	6	6
	Present data to stakeholders	5	5
	Analyse and interpret data and marketing information	8	8
			115
Elective	Manage marketing communications production	12	12
	Evaluate and buy media	20	20
	Investigate and explain marketing communications concepts	8	8
	Demonstrate an understanding of marketing communications roles	12	12
			52

UNIT STANDARDS IN NATIONAL DIPLOMA IN MARKETING COMMUNICATIONS NQF LEVEL 5

UNIT STANDARDS ON NQF LEVEL 5

Core

1. Title Conduct a marketing situational analysis
2. Title Lead a team of marketers and service providers
3. Title Develop, implement and manage a project / activity plan
4. Title Implement a generic communication strategy
5. Title Identify product features, advantages and benefits to the customer
6. Title provide product training to others in the organisation
7. Title Close a deal with a customer
8. Title Identify brand mix elements
9. Title Identify financial implications for making decisions
10. Title Integrate marketing plans with business process
11. Title Coach others on principles of marketing in an organisation
12. Title Monitor handling of customers by frontline customer service
13. Title Manage customer requirements and needs and implement action plans
14. Title Identify and manage areas of customer service impact
15. Title Present data to stakeholders
16. Title Analyse and interpret data and marketing information

Elective

17. Title Manage marketing communications production
18. Title Evaluate and buy media
19. Title Investigate and explain marketing communications concepts
20. Title Demonstrate an understanding of marketing communications roles

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL DIPLOMA IN MARKETING COMMUNICATIONS NQF LEVEL 5

UNIT STANDARDS ON NQF LEVEL 5

1. Title Conduct a marketing situational analysis

Specific Outcome	1.1	Gather data relating to project from the environment
Specific Outcome	1.2	Analyse data for the marketing situational analysis
Specific Outcome	1.3	Draw conclusion and make recommendations
2. Title Lead a team of marketers and service providers

Specific Outcome	2.1	Set objectives for marketing team
Specific Outcome	2.2	Coach marketing staff to be able to achieve objectives
Specific Outcome	2.3	Monitor performance of marketing staff against targets
Specific Outcome	2.4	Provide feedback on performance
Specific Outcome	2.5	Take corrective action as needed

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| 3. | Title | Develop, implement and manage a project / activity plan |
| Specific Outcome | 3.1 | Evaluate proposals and select preferred option |
| Specific Outcome | 3.2 | Conceptualise plan |
| Specific Outcome | 3.3 | Delegate tasks |
| Specific Outcome | 3.4 | Track project |
| 4. | Title | Implement a generic communication strategy |
| Specific Outcome | 4.1 | Identify and explain a generic communications model |
| Specific Outcome | 4.2 | Analyse, interpret and implement a generic communication strategy |
| 5. | Title | Identify product features, advantages and benefits to the customer |
| Specific Outcome | 5.1 | Identify needs of the customer |
| Specific Outcome | 5.2 | Present features, advantages and benefits to the customer |
| Specific Outcome | 5.3 | Demonstrate features, advantages and benefits |
| 6. | Title | Provide product training to others in the organisation |
| Specific Outcome | 6.1 | Establish an environment conducive to learning and development needs |
| Specific Outcome | 6.2 | Implement the product training activities |
| 7. | Title | Close a deal with a customer |
| Specific Outcome | 7.1 | Apply personal selling skills to sell products or services |
| Specific Outcome | 7.2 | Apply closing techniques to sell products or services |
| 8. | Title | Identify brand mix elements |
| Specific Outcome | 8.1 | Describe factors influencing branding |
| Specific Outcome | 8.2 | Explain brand familiarity |
| 9. | Title | Identify financial implications for making decisions |
| Specific Outcome | 9.1 | Evaluate financial statements against reporting requirements. |
| Specific Outcome | 9.2 | Apply financial analysis tools to interpret and report on financial implications |

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| 10. | Title | Integrate marketing plans with business process |
| Specific Outcome | 10.1 | Monitor the marketing environment and determine variables for marketing activities |
| Specific Outcome | 10.2 | Distinguish the role of marketing research and marketing information systems in investigating and understanding the operations of the market place |
| Specific Outcome | 10.3 | Distinguish characteristics of major markets |
| Specific Outcome | 10.4 | Identify influences on consumer behaviour in relation to marketing activities |
| 11. | Title | Coach others on principles of marketing in an organisation |
| Specific Outcome | 11.1 | Describe marketing principles and ethics to others |
| Specific Outcome | 11.2 | Develop and implement a coaching / monitoring plan |
| Specific Outcome | 11.3 | Develop and implement a monitoring programme |
| Specific Outcome | 11.4 | Monitor events of a "marketing culture" in the organisation |
| 12. | Title | Monitor handling of customers by frontline customer service |
| Specific Outcome | 12.1 | Monitor interaction between customer service providers and the customer |
| Specific Outcome | 34.2 | Monitor the customer's satisfaction |
| Specific Outcome | 34.3 | Monitor key performance areas |
| 13. | Title | Manage customer requirements and needs and implement action plans |
| Specific Outcome | 13.1 | Listen to and interpret customer needs |
| Specific Outcome | 13.2 | Describe action plan |
| Specific Outcome | 13.3 | Implement action plan to meet customer's needs |
| Specific Outcome | 13.4 | Track and measure the action plan to its completion |
| 14. | Title | Identify and manage areas of customer service impact |
| Specific Outcome | 14.1 | Identify "touch points" of customers |
| Specific Outcome | 14.2 | Determine solutions in areas of customer service |
| Specific Outcome | 14.3 | Action change or improve areas of customer service |
| 15. | Title | Present data to stakeholders |
| Specific Outcome | 15.1 | Develop the presentation of data to stakeholders |
| Specific Outcome | 15.2 | Present data to stakeholders |

16. Title Analyse and interpret data and marketing information
- Specific Outcome 16.1 Analyse data and marketing information
- Specific Outcome 16.2 Interpret data and marketing information
17. Title Manage marketing communications production
- Specific Outcome 17.1 Describe printing processes to enhance production.
- Specific Outcome 17.2 Co-ordinate the production of marketing communications materials.
- Specific Outcome 17.3 Describe the requirements of Internet and web design.
- Specific Outcome 17.4 Describe process for the production of films and videos.
- Specific Outcome 17.5 Identify, evaluate and select production options.
- Specific Outcome 17.6 Organise and conduct shoot.
- Specific Outcome 17.7 Describe the process of radio production.
18. Title Evaluate and buy media
- Specific Outcome 18.1 Interpret media plan and objectives.
- Specific Outcome 18.2 Analyse, evaluate and buy media.
- Specific Outcome 18.3 Media campaign is monitored and managed.
19. Title Investigate and explain marketing communications concepts
- Specific Outcome 19.1 Identify and explain marketing communication concepts and ideas.
- Specific Outcome 19.2 Implement low and high focus thinking.
- Specific Outcome 19.3 Explain and apply lateral thinking processes.
20. Title Demonstrate an understanding of marketing communications roles
- Specific Outcome 20.1 Explain the principles and roles of art direction.
- Specific Outcome 20.2 Implement art direction.
- Specific Outcome 20.3 Explain the role of art director.
- Specific Outcome 20.4 Describe and implement desktop publishing and multi-media.
- Specific Outcome 20.5 Describe and explain marketing communications research.
- Specific Outcome 20.6 Describe and explain graphic design.

No. 1217

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**NATIONAL FIRST DEGREE IN MARKETING COMMUNICATION NQF LEVEL 6**

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	6
Credit:	366
Issue date:	31 August 2001
Review date:	01 September 2003

Rationale of the qualification

The National First Degree in Marketing Communications: Level 6 is designed to meet the needs of those learners who want to progress in the field of Marketing and will assist those who make Marketing Communications their chosen career path. The qualification in Marketing Communications offers scope for a large variety of talents, displayed by individuals of diverse backgrounds, cultures, and of either gender.

The qualification in marketing can be followed in virtually every sector, i.e. business-to-business marketing, i.e. products or services sold to other businesses; services marketing, i.e. education, real estate, travel and tourism, legal services, etc; fast moving consumer goods, i.e. products people need and use every day; financial services, i.e. banking and insurance.

At the higher levels the Marketing profession needs a set of unit standards against which to align and measure it self.

The National First Degree in Marketing Communications will provide and offer the skills, knowledge and understanding of marketing that are essential for analysis of market conditions, development of marketing strategies, product and brand development, pricing, distribution (local and international), integrated marketing communication (including advertising, promotions and public relations) and interaction with the customer (through selling and customer service).

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Creative Directors
- Account Executives
- Media Planners
- Marketing Managers
- Marketing Traffic Controllers
- Copywriters
- Marketing Communication Specialists

This qualification will help the learner at Level 6 to get the requirements of such a qualification, namely, the general knowledge and understanding of business functions as well as a detailed practical understanding of Marketing Communications.

The qualification is structured in such a way that exposes individuals to a set of core competences to enable them to function in this role. The electives will provide for more special competence in the area of Marketing Communications. The qualification will also promote the notion of life-long learning.

Purpose of the qualification

Learners acquiring this qualification would be operating in an advanced environment of Marketing Communications and will be more involved in the development, enhancement and growth of Marketing Communications Technologies and practice. Learners will be learning around areas of Strategy, Customer Relations and Marketing Principles. Learners will also be involved with core issues of Marketing Management, Customer Management and Marketing Research but will be furthering their specialisation Marketing Communications.

Access to the Qualification

As this is a unit standard based qualification, any learner who is competent in the unit standard as required by the core, fundamental and elective components stipulated in the qualification, will have free access to the qualification.

Learning assumed to be in place

Learners accessing this qualification will have demonstrated competence against the standards in the Diploma Marketing Communication or Marketing Research or Marketing Management or Customer Management or equivalent at NQF Level 5.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Articulate a vision and develop a strategic plan to meet the vision.
- Monitor and review activity plans and the performance levels of marketers and service providers.
- Manage all aspects of a communications project and review its effectiveness.
- Assess the sales environment in order to present a range of products and services to meet objectives.
- Identify and manage innovation opportunities and processes.
- Determine, co-ordinate and monitor brand mix decisions and elements.
- Integrate and promote marketing principles, including ethics policies throughout the organization.

- Formulate, design, implement, service delivery systems and processes.
- Measure and analyse customer service delivery systems and processes.
- Identify, design, implements, measure and analyse customer service levels.
- Establish and determine research requirements and design and recommend a research brief.
- Develop, implement and monitor marketing communication objectives and strategies.
- Manage the account team and the communications research process.
- Develop and implement the marketing communication concept and creative process.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The articulation of vision into strategic marketing objectives and strategies then monitoring activity plans to meet objectives.
- Performance criteria in terms of setting, collecting, comparing and providing feedback on performance.
- Marketing Communications projects, their identification, evaluation, selection, management and review.
- A range of products and services and their presentation in line with objectives and time frames.
- Innovation as an important part of marketing and its successful implementation in an organisation.
- Brand mix and the role variables and brand mix decision have on outcomes.
- Marketing principles and ethics and the importance of promoting and integrating these into marketing policy.
- Customer service levels, measurement and analysis and the design and implementation of customer service delivery systems.
- Research requirement, their establishment and systems and the design of a research brief.
- Marketing communication objectives, strategies, campaign and communications research process.
- The marketing account team and its management process.
- The creative marketing process, its development and implementation.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Marketing Communications qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Marketing Communications industry, learners may also be able to follow a career in

- Advertising
- Promotion
- Public Relations
- General Marketing
- Customer Services
- Direct Marketing
- Direct Selling
- Sales
- Marketing Research
- Marketing Consultancy
- Merchandising
- Marketing Management

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector eg. FMCG; Retail, Wholesale, Motor, Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc

A learner could follow a career in the Marketing Communications field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 6	Cr	Total
Fundamental	Present a strategy using creative means to a range of stakeholders	60	60
	Interpret historical data and present a range of formula to influence decision making	60	60 60
			120
Core	Develop a strategic plan	15	15
	Monitor and review activity plan	7	7
	Monitor performance of marketers and service providers	10	10
	Manage a communications projects	15	15
	Present a range of products or services	15	15
	Identify innovation opportunities	15	15
	Integrate brand mix elements	15	15
	Promote principles of Marketing throughout organisations	8	8
	Integrate ethics policy into marketing policy	6	6
	Measure and analyse customer service level	12	12
	Formulate, design and implement customer service delivery systems and processes	8	8
	Conceptualise and research requirements	10	10
	Design a research brief	10	10
			146
Elective	Develop campaign; media and creative strategies	20	20
	Manage the account team	20	20
	Manage the communications research process	20	20
	Develop and implement the creative process	40	40
			100

UNIT STANDARDS IN NATIONAL FIRST DEGREE IN MARKETING COMMUNICATIONS NQF LEVEL 6

UNIT STANDARDS ON NQF LEVEL 6

Core

1. Title Develop a strategic plan
2. Title Monitor and review activity plan
3. Title Monitor performance of marketers and service providers
4. Title Manage a communications projects
5. Title Present a range of products or services
6. Title Identify innovation opportunities
7. Title Integrate brand mix elements
8. Title Promote principles of Marketing throughout organisations
9. Title Integrate ethics policy into marketing policy
10. Title Measure and analyse customer service level
11. Title Formulate, design and implement customer service delivery systems and processes
12. Title Conceptualise and research requirements
13. Title Design a research brief

Elective

14. Title Develop campaign; media and creative strategies
15. Title Manage the account team
16. Title Manage the communications research process
17. Title Develop and implement the creative process

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL FIRST DEGREE IN MARKETING COMMUNICATIONS NQF LEVEL 6

UNIT STANDARDS ON NQF LEVEL 6

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| 1. | Title | Develop a strategic plan. |
| Specific Outcome | 1.1 | Articulate the vision in a marketing context |
| Specific Outcome | 1.2 | Analyse possible long term trends with macro, micro, market and competitor environments |
| Specific Outcome | 1.3 | Develop strategic marketing objectives |
| Specific Outcome | 1.4 | Develop alternative long-term strategies |
| Specific Outcome | 1.5 | Evaluate and recommend "best " strategy |

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| 2. | Title | Monitor and review activity plan |
| Specific Outcome | 2.1 | Check activities to be performed in activity plans |
| Specific Outcome | 2.2 | Evaluate results |
| Specific Outcome | 2.3 | Develop options to counteract variances |
| Specific Outcome | 2.4 | Evaluation of options |
| Specific Outcome | 2.5 | Made recommendations |
| 3. | Title | Monitor performance of marketers and service providers |
| Specific Outcome | 3.1 | Set performance criteria |
| Specific Outcome | 3.2 | Collect relevant data |
| Specific Outcome | 3.3 | Compare actual to standard |
| Specific Outcome | 3.4 | Give feedback to marketers and service providers |
| 4. | Title | Manage a communications projects |
| Specific Outcome | 4.1 | Identify, evaluate and select the communications methods and format |
| Specific Outcome | 4.2 | Manage the communications project implementation |
| Specific Outcome | 4.3 | Review the communications project effectiveness |
| 5. | Title | Present a range of products or services |
| Specific Outcome | 5.1 | Establish objectives for presenting a range of products or services |
| Specific Outcome | 5.2 | Assess the internal and external sales environment |
| Specific Outcome | 5.3 | Present a range of products or services |
| 6. | Title | Identify innovation opportunities |
| Specific Outcome | 6.1 | Identify and examine processes and methods to facilitate innovation within an organisation |
| Specific Outcome | 6.2 | Lead and manage innovation processes within an organisation |
| 7. | Title | Integrate brand mix elements |
| Specific Outcome | 7.1 | Determine variables of the brand mix |
| Specific Outcome | 7.2 | Confirm, co-ordinate and monitor brand mix decisions |
| 8. | Title | Promote principles of Marketing throughout organisations |
| Specific Outcome | 8.1 | Design and develop appropriate programme to achieve desired culture |
| Specific Outcome | 8.2 | Implement programme to achieve desired culture |
| Specific Outcome | 8.3 | Evaluate programme |

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| 9. | Title | Integrate ethics policy into marketing policy |
| Specific Outcome | 9.1 | Ensure that ethics are integrated into the marketing programme |
| Specific Outcome | 9.2 | Evaluate marketing ethics practices |
| Specific Outcome | 9.3 | Correct unethical marketing practices |
| 10. | Title | Measure and analyse customer service level |
| Specific Outcome | 10.1 | Identify factors which influence customer service and perceptions |
| Specific Outcome | 10.2 | Design methodologies to measure factors and perceptions of customer service |
| Specific Outcome | 10.3 | Implement customer service measurement processes and collect data |
| Specific Outcome | 10.4 | Analyse measurement results of customer service levels |
| 11. | Title | Formulate, design and implement customer service delivery systems and processes |
| Specific Outcome | 11.1 | Developing and implementing an action plan to achieve desired service levels |
| Specific Outcome | 11.2 | Monitor progress and effectiveness of action plans implemented |
| 12. | Title | Conceptualise and research requirements |
| Specific Outcome | 12.1 | Establish research requirements |
| Specific Outcome | 12.2 | Determine research requirement systems |
| 13. | Title | Design a research brief |
| Specific Outcome | 13.1 | Assess and recommend a research brief |
| Specific Outcome | 13.2 | Design a research brief to optimise results. |
| 14. | Title | Develop campaign; media and creative strategies |
| Specific Outcome | 14.1 | Develop marketing communications objectives and strategies. |
| Specific Outcome | 14.2 | Implement marketing communications, objectives and strategies. |
| Specific Outcome | 14.3 | Monitor and review marketing communications campaign. |
| 15. | Title | Manage the account team. |
| Specific Outcome | 15.1 | Identify the role and function of the Account Manager. |
| Specific Outcome | 15.2 | Identify the role and function of the Strategic Planner. |

- 16. Title** **Manage the communications research process.**
- Specific Outcome 16.1** **Assess the need for research.**
- Specific Outcome 16.2** **Establish and set research objectives.**
- Specific Outcome 16.3** **Evaluate research providers and services.**
- Specific Outcome 16.4** **Select and brief providers and determine research methods.**
- Specific Outcome 16.5** **Evaluate and research proposals and select best fit.**
- Specific Outcome 16.6** **Analyse, interpret, present and apply research findings and results.**

- 17. Title** **Develop and implement the creative process.**

- Specific Outcome 17.1** **Develop the marketing communications concept.**
- Specific Outcome 17.2** **Implement creative process.**

No. 1218

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY*Established in terms of Act 58 of 1995***NATIONAL SECOND DEGREE IN MARKETING COMMUNICATIONS NQF LEVEL 7**

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	7
Credit:	494
Issue date:	31 August 2001
Review date:	01 September 2003

Rationale of the qualification

The National Second Degree in Marketing Communications: Level 7 is designed to meet the needs of those learners who want to progress in the field of Marketing and will assist those who make Marketing Communications their chosen career path. The qualification in Marketing Communications offers scope for a large variety of talents, displayed by individuals of diverse backgrounds, cultures, and of either gender.

The qualification in marketing can be followed in virtually every sector, i.e. business-to-business marketing, i.e. products or services sold to other businesses; services marketing, i.e. education, real estate, travel and tourism, legal services, etc; fast moving consumer goods, i.e. products people need and use every day; financial services, i.e. banking and insurance.

At the higher levels the Marketing profession needs a set of unit standards against which to align and measure it self.

The National Second Degree in Marketing Communications will provide and offer the skills, knowledge and understanding of marketing that are essential for analysis of market conditions, development of marketing strategies, product and brand development, pricing, distribution (local and international), integrated marketing communication (including advertising, promotions and public relations) and interaction with the customer (through selling and customer service).

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Creative Directors
- Account Executives
- Media Planners
- Marketing Managers
- Marketing Traffic Controllers
- Copywriters
- Marketing Communication Specialists

This qualification will help the learner at Level 7 to get the requirements of such a qualification, namely, the general knowledge and understanding of business functions as well as a detailed practical understanding of Marketing Communications.

The qualification is structured in such a way that exposes individuals to a set of core competences to enable them to function in this role. The electives will provide for more special competence in the area of Marketing Communications. The qualification will also promote the notion of life-long learning.

Purpose of the qualification

This higher degree will allow learners to operate at a strategic and conceptual level in designing and strategising new technologies, methodologies and techniques of furthering the purposes and benefits of Marketing Communications.

Access to the Qualification

As this is a unit standard based qualification, any learner who is competent in the unit standard as required by the core, fundamental and elective components stipulated in the qualification, will have free access to the qualification.

Learning assumed to be in place

Learners accessing this qualification will have demonstrated competence against the standards in the National Degree - Marketing Communications or equivalent NQF 6.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Analyse and evaluate global trends and develop a vision for an organization.
- Develop a monitoring system and evaluate and monitor a strategic marketing plan.
- Monitor and control all aspects of an internal or external marketing unit.
- Interpret a brief and develop a public relations and marketing campaign.
- Develop, plan and review alternative marketing opportunities.
- Assess current marketing culture and set marketing culture and ethics objectives to instill a marketing culture and ethics in all stakeholder groups.
- Create and maintain a positive culture of customer service in the supply chain and conceptualise innovative customer service strategies.
- Develop, assess and write research policies and sponsor research activities for market research projects.

- Develop an integrated Marketing Communications strategy and global Marketing Communications strategy.
- Manage specialized areas in Marketing Communications and the Marketing Communications strategies.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The overall process for developing an organisation vision.
- The strategic marketing plans development and evaluation.
- The process for starting and structuring a marketing unit and the application of financial plans and controls.
- Public relations and marketing campaigns are defined and interpreted strategies developed to meet requirements.
- The involvement of all stakeholders to develop alternative opportunities.
- Marketing culture establishment in all stakeholder groups.
- Marketing best practice ethics are established, set and implemented within given resource constraints.
- Customer service culture is developed and innovative systems conceptualised to meet objectives.
- Research projects are identified, sponsored and monitored.
- Research policies are developed, agreed and recommended and assist organisation to meet its objectives.
- Integrated marketing communications strategy is developed and managed to achieve overall marketing objectives.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Marketing Communications qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Marketing Communications industry, learners may also be able to carry out careers in

- Advertising
- Promotion
- Public Relations
- General Marketing
- Customer Services
- Direct Marketing
- Direct Selling
- Sales
- Marketing Research
- Marketing Consultancy
- Merchandising
- Marketing Management

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector eg. FMCG; Retail, Wholesale, Motor, Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc

A learner could follow a career in the Marketing Communications field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 7	Cr	Total
Fundamental	Present a national strategy benchmarked to add value internationally	70	70
	Establish scenarios of best practice	70	70 60
			140
Core	Develop a vision for an organisation	20	20
	Monitor and evaluate a strategic marketing plan	20	20
	Manage a Marketing Unit (Internal or External)	60	60
	Develop a public relations and marketing campaign	20	20
	Generate alternative opportunities	10	10
	Instil Marketing culture in all stakeholder groups	8	8
	Set Marketing Ethics Policy	8	8
	Create a culture of customer service in the supply chain	20	20
	Conceptualise innovative customer service systems and strategies	30	30
	Sponsor research projects	10	10
	Set research policy	10	10
			216
Elective	Develop an integrated marketing communications strategy	50	50
	Manage specialised areas in marketing communications	40	40
	Develop and manage global marketing communications strategy.	50	50
			140

UNIT STANDARDS IN NATIONAL SECOND DEGREE IN MARKETING COMMUNICATIONS**NQF LEVEL 7****UNIT STANDARDS ON NQF LEVEL 7****Core**

1. Title Develop a vision for an organisation
2. Title Monitor and evaluate a strategic marketing plan
3. Title Manage a Marketing Unit (Internal or External)
4. Title Develop a public relations and marketing campaign
5. Title Generate alternative opportunities
6. Title Instil Marketing culture in all stakeholder groups
7. Title Set Marketing Ethics Policy
8. Title Create a culture of customer service in the supply chain
9. Title Conceptualise innovative customer service systems and strategies
10. Title Sponsor research projects
11. Title Set research policy

Elective

12. Title Develop an integrated marketing communications strategy
13. Title Manage specialised areas in marketing communications
14. Title Develop and manage global marketing communications strategy.

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL SECOND DEGREE IN MARKETING COMMUNICATIONS NQF LEVEL 7**UNIT STANDARDS ON NQF LEVEL 7**

1. Title Develop a strategic plan.
- | | | |
|------------------|-----|---|
| Specific Outcome | 1.1 | Articulate the vision in a marketing context |
| Specific Outcome | 1.2 | Analyse possible long term trends with macro, micro, market and competitor environments |
| Specific Outcome | 1.3 | Develop strategic marketing objectives |
| Specific Outcome | 1.4 | Develop alternative long-term strategies |
| Specific Outcome | 1.5 | Evaluate and recommend "best " strategy |

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|------------------|-------|--|
| 2. | Title | Monitor and review activity plan |
| Specific Outcome | 2.1 | Check activities to be performed in activity plans |
| Specific Outcome | 2.2 | Evaluate results |
| Specific Outcome | 2.3 | Develop options to counteract variances |
| Specific Outcome | 2.4 | Evaluation of options |
| Specific Outcome | 2.5 | Made recommendations |
| 3. | Title | Monitor performance of marketers and service providers |
| Specific Outcome | 3.1 | Set performance criteria |
| Specific Outcome | 3.2 | Collect relevant data |
| Specific Outcome | 3.3 | Compare actual to standard |
| Specific Outcome | 3.4 | Give feedback to marketers and service providers |
| 4. | Title | Manage a communications projects |
| Specific Outcome | 4.1 | Identify, evaluate and select the communications methods and format |
| Specific Outcome | 4.2 | Manage the communications project implementation |
| Specific Outcome | 4.3 | Review the communications project effectiveness |
| 5. | Title | Present a range of products or services |
| Specific Outcome | 5.1 | Establish objectives for presenting a range of products or services |
| Specific Outcome | 5.2 | Assess the internal and external sales environment |
| Specific Outcome | 5.3 | Present a range of products or services |
| 6. | Title | Identify innovation opportunities |
| Specific Outcome | 6.1 | Identify and examine processes and methods to facilitate innovation within an organisation |
| Specific Outcome | 6.2 | Lead and manage innovation processes within an organisation |
| 7. | Title | Integrate brand mix elements |
| Specific Outcome | 7.1 | Determine variables of the brand mix |
| Specific Outcome | 7.2 | Confirm, co-ordinate and monitor brand mix decisions |
| 8. | Title | Promote principles of Marketing throughout organisations |
| Specific Outcome | 8.1 | Design and develop appropriate programme to achieve desired culture |
| Specific Outcome | 8.2 | Implement programme to achieve desired culture |
| Specific Outcome | 8.3 | Evaluate programme |

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| 9. | Title | Integrate ethics policy into marketing policy |
| Specific Outcome | 9.1 | Ensure that ethics are integrated into the marketing programme |
| Specific Outcome | 9.2 | Evaluate marketing ethics practices |
| Specific Outcome | 9.3 | Correct unethical marketing practices |
| 10. | Title | Measure and analyse customer service level |
| Specific Outcome | 10.1 | Identify factors which influence customer service and perceptions |
| Specific Outcome | 10.2 | Design methodologies to measure factors and perceptions of customer service |
| Specific Outcome | 10.3 | Implement customer service measurement processes and collect data |
| Specific Outcome | 10.4 | Analyse measurement results of customer service levels |
| 11. | Title | Formulate, design and implement customer service delivery systems and processes |
| Specific Outcome | 11.1 | Developing and implementing an action plan to achieve desired service levels |
| Specific Outcome | 11.2 | Monitor progress and effectiveness of action plans implemented |
| 12. | Title | Develop an integrated marketing communications strategy |
| Specific Outcome | 12.1 | Establish integrated marketing communication objectives |
| Specific Outcome | 12.2 | Develop an integrated marketing communication programme |
| Specific Outcome | 12.3 | Implement integrated marketing communication programme |
| Specific Outcome | 12.4 | Monitor and review integrated marketing communication programme |
| 13. | Title | Manage specialised areas in marketing communications |
| Specific Outcome | 13.1 | Manage consumer marketing communications |
| Specific Outcome | 13.2 | Manage business-to-business marketing communications |
| Specific Outcome | 13.3 | Manage marketing communications for non-profit organisations |
| Specific Outcome | 13.4 | Manage marketing communications for service industry |
| 14. | Title | Develop and manage global marketing communications strategy |
| Specific Outcome | 14.1 | Identify global issues pertaining to marketing communications |
| Specific Outcome | 14.2 | Select and co-ordinate global marketing communications strategies |
| Specific Outcome | 14.3 | Utilise multimedia technology for global marketing communications communication |
| Specific Outcome | 14.4 | Co-ordinate multinational/global marketing communications agency |

No. 1219

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY



NATIONAL CERTIFICATE IN CUSTOMER MANAGEMENT NQF LEVEL 4

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	4
Credit:	134
Issue date:	31 August 2001
Review date:	01 September 2003

Rational of the qualification

The National Qualification in Customer Management: Level 4 is designed to meet the needs of those learners who enter the field of Customer Management. The whole marketing field per se is a key business function necessary for the success of any organisation, both strategically and operationally. The qualification is inextricably linked to the Standard Generating Body's (SGB's), definition of Marketing, "to identify, anticipate and satisfy current and future consumer and customer expectations, needs and problems by facilitating and consummating exchange to achieve targeted levels of profitability and / or value in an accountable and socially responsible manner. The Customer Management National Certificate at NQF Level 4 will provide a broad knowledge and skills needed in the industry and to progress along a career path for learners who

- Were previously disadvantaged or who were unable to complete their schooling and were therefore denied access to Further Education and Training.
- Have worked in Customer Management for many years, but have no formal qualification in Customer Management.
- Wish to extend their range of skills and knowledge of the industry so that they can become knowledge workers in Customer Management.

The National Certificate in Customer Management: Level 4 allows the learner to work towards a nationally recognised whole qualification. The qualification will allow both those in formal education and those already employed in marketing organisations access, due to its flexibility. It aims to develop individuals who are informed and skilled in Customer Management.

The qualification has building blocks that can be developed further and will lead to a more defined Customer Management career path at NQF Level 5. It also focuses on the skills, knowledge, values and attitudes required to progress further. The intention is

- To promote the development of knowledge and skills that are required in all sub-sectors of marketing.
- To release the potential of people.
- To provide opportunities for people to move up the value chain.

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

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|-----------------------------|--------------------------|
| • Sales Managers | • Category Managers |
| • Sales Representatives | • Telesales Clerks |
| • National Account Managers | • Sales Directors |
| • Key Account Managers | • Client Services Clerks |
| • Channel Managers | • Field Marketers |

The National Certificate in Customer Management: Level 4 should produce knowledgeable, skilled Customer Managers who are able to contribute to improved productivity and efficiency within the marketing industry. It should provide the means for current individuals in the Customer Management field to receive recognition of prior learning and to upgrade their skills and knowledge base. The qualification is structured in such a way that exposes individuals to a set of core competences to give a broad understanding of marketing and the electives, which will allow for a specific competence in Customer Management. It will also promote the notion of life-long learning.

Purpose of the qualification

Any individuals who are or wish to be involved in Customer Management will access this qualification. It also serves as the entry qualification into Marketing Research Qualifications in the higher band of learning. This qualification will be registered at NQF Level 4. This qualification is also related to other qualifications such as the National Certificate in Marketing Communications, the National Certificate in Marketing Research and the National Certificate in Marketing Management where all four of these qualifications will share fundamental competence as well as core competence. Portability across all four of these National Certificates are therefore ensured.

Access to the Qualification

As this is a "complete and whole" qualification, any learner who can provide guidance of the learning assumed to be in place, has open access to this qualification.

Learning assumed to be in place

Learners accessing this qualification will have demonstrated competence in communicating verbally and in writing and computer technology at Level 3 on the NQF or equivalent.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Work with other members of a marketing team to meet performance standards and objectives.
- Identify, assess, utilize and account for marketing expertise and resources in order to meet marketing objectives and report on results.
- Identify prospective customers and their needs and present the correct features, advantages and benefits to enable customers to make informed buying decisions.
- Demonstrate an understanding of product positioning, product life cycles, market segmentation, marketing mix and the competitive environment for products and services.
- Demonstrate an understanding for and comply with legislation, rules, activities and transactions.
- Identify and evaluate brand product and service promotional opportunities and co-ordinate and evaluate promotional activities and results.
- Comply with organisational ethics by applying marketing principles, concepts and culture through the identification of all stakeholders and their relationships.
- Liase with a range of customers and identifying and solving customers complaints and problems.
- Identify, monitor and review marketing information and gather and process data for research and information purposes.
- Take orders from customers to ensure customer needs are fulfilled and remain satisfied.
- Conduct follow-up procedures with customers to evaluate and maintain customer satisfaction levels and relationships.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The importance of working together and communicating with all stakeholders in order to meet marketing requirements and objectives.
- Giving identified customers the correct information (features, advantages and benefits) to enable them to make informed buying decisions.
- The legal and ethical requirements in the marketing field.
- Product positioning, target markets and the competitive environment.
- Promotions which deal with either brand, product or service.
- The importance of knowing the internal and external stakeholders and believing in marketing as a profession.
- The methods, techniques and principles of dealing with customers and clients to meet their needs.
- Being able to source expertise and resources to assist with information gathering and processing.
- The way customers verbal and written orders are taken and recorded and opportunities and options for dealing with these.
- Procedures and processes for conducting administration issues pertaining to customer orders.
- How to follow-up on customer orders and how to maintain customer satisfaction and relationships.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, and reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Customer Management research qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Customer Management industry, learners may also be able to enter careers in

- General Marketing
- Customer Services
- Direct Selling
- Sales
- Marketing Consulting
- Merchandising
- Marketing Management

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector e.g. EMCG; Retail, Wholesale, Motor; Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc.

A learner could follow a career in the Customer Management field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 4	Cr	Total
Fundamental	Communicate verbally and in writing to a range of stakeholders	20	20
	Work with a range of software packages to generate, maintain and manipulate data	20	20
			40
Core	Work as a member of a marketing team	5	5
	Meet marketing performance standards	4	4
	Identify and utilise marketing resources to meet objectives	4	4
	Describe features, advantages and benefits of a range of products	6	6
	Identify customers of the business	4	4
	Demonstrate an understanding of product positioning	4	4
	Comply with legal requirements and understand implications	4	4
	Deal with brand, product and service promotions	4	4
	Demonstrate an understanding of the target market	4	4
	Demonstrate an understanding of the competitive environment	4	4
	Instill in myself a personal marketing culture	4	4
	Comply with organisational ethics	4	4
	Identify internal and external stakeholders	4	4
	Liaise with a range of customers of a business	4	4
	Handle a range of customer complaints	4	4
	Identify expertise and resources	3	3
	Monitor marketing information flow and collect and process marketing data	4	4
			70
Elective	Take orders from customers to fulfill a need for goods and/or services	10	10
	Conduct follow-up with customers to evaluate satisfaction levels	14	14
			24

UNIT STANDARDS IN NATIONAL CERTIFICATE IN CUSTOMER MANAGEMENT NQF LEVEL 4**UNIT STANDARDS ON NQF LEVEL 4****Core**

1. Title Work as a member of a marketing team
2. Title Meet marketing performance standards
3. Title Identify and utilise marketing resources to meet objectives
4. Title Describe features, advantages and benefits of a range of products
5. Title Identify customers of the business
6. Title Demonstrate an understanding of product positioning
7. Title Comply with legal requirements and understand implications
8. Title Deal with brand, product and service promotions
9. Title Demonstrate an understanding of the target market
10. Title Demonstrate an understanding of the competitive environment
11. Title Instill in myself a personal marketing culture
12. Title Comply with organisational ethics
13. Title Identify internal and external stakeholders
14. Title Liaise with a range of customers of a business
15. Title Handle a range of customer complaints
16. Title Identify expertise and resources
17. Title Monitor marketing information flow and collect and process marketing data

Elective

18. Title Take orders from customers to fulfill a need for goods and/or services
19. Title Conduct follow-up with customers to evaluate satisfaction levels

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL CERTIFICATE IN CUSTOMER MANAGEMENT NQF LEVEL 4**UNIT STANDARDS ON NQF LEVEL 4**

1. Title Work as a member of a marketing team

Specific Outcome	1.1	Communicate with all relevant stakeholders to enhance teamwork
Specific Outcome	1.2	Report on team progress to appropriate authority and team
Specific Outcome	1.3	Display tendencies to work with others as a member of a marketing team
Specific Outcome	1.4	Handle and resolve areas of conflict

2. Title Meet marketing performance standards

Specific Outcome	2.1	Demonstrate an understanding of marketing performance standards
Specific Outcome	2.2	Follow instructions to meet standards
Specific Outcome	2.3	Meet marketing objectives
Specific Outcome	2.4	Report on marketing objectives progress

17. Title Monitor marketing information flow and collect and process marketing data

- Specific Outcome 17.1 Identify marketing information flow needs
- Specific Outcome 17.2 Monitor and review marketing information flow
- Specific Outcome 17.3 Gather data for researching and information purposes
- Specific Outcome 17.4 Process data for researching information purposes

18. Title Take orders from customers to fulfill a need for goods and/or services

- Specific Outcome 18.1 Accept and record customers order verbally
- Specific Outcome 18.2 Accept and record customers written order
- Specific Outcome 18.3 Complete and administer order procedures and documentation
- Specific Outcome 18.4 Confirm and distribute orders

19. Title Conduct follow-up with customers to evaluate satisfaction levels

- Specific outcome 19.1 Follow-up on orders placed
- Specific Outcome 19.2 Maintain customer satisfaction and relationships

No. 1220

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITYEstablished in terms of Act 58 of 1995**NATIONAL DIPLOMA IN CUSTOMER MANAGEMENT NQF LEVEL 5**

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	5
Credit:	243
Issue date:	31 August 2001
Review date:	01 September 2003

Rational of the qualification

The National Diploma in Customer Management: Level 5 is designed to meet the needs of those learners who are already involved in the field of Customer Management or who enter the field at a higher level. Learners recognise that marketing is an essential and key business function necessary for the success of any organisation, both strategically and operationally. The qualification is inextricably linked to the Standard Generating Body's (SGB's), definition of Marketing, "to identify, anticipate and satisfy current and future consumer and customer expectations, needs and problems by facilitating and consummating exchange to achieve targeted levels of profitability and / or value in an accountable and socially responsible manner.

This qualification also reflects the needs of the marketing sector both now and in the future: it gives accessibility and flexibility to the learner and to the employer. The level of flexibility is reflected in the multiple job roles and careers, organisational requirements and changing technological nature of marketing and at the same time it allows the individual to work towards a nationally recognised qualification

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Sales Managers
- Sales Representatives
- National Account Managers
- Key Account Managers
- Channel Managers
- Category Managers
- Telesales Clerks
- Sales Directors
- Client Services Clerks
- Field Marketers

The National Diploma in Customer Management is structured in such a way that it exposes learners to a broad set of core competences while the electives allow for special competence in Customer Management. It certainly promotes the notion of life-long learning.

Purpose of the qualification

Learners acquiring this qualification will have demonstrated competence at NQF Level 4 in the area of Customer Management or will have attained an equivalent qualification at that level. This qualification will be registered at NQF Level 5 on the National Qualification Framework and learners will have acquired a range of fundamental, core and elective competence around the areas of Marketing Strategy, Marketing Customer Relations, Principles of Marketing, Marketing Communications, Marketing Management, Marketing Research and Customer Management. Learners will have also demonstrated competence against specialised outcomes in the area of Customer Management.

Access to the Qualification

As this is a unit standard based qualification, any learner who is competent in the unit standard as required by the core, fundamental and elective components stipulated in the qualification, will have free access to the qualification.

Learning assumed to be in place

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.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Conduct a marketing situational analysis while leading a team of Marketers and Service Providers.
- Develop, implement and manage a marketing related project and / or activity plan, and implement a generic marketing communications strategy.
- Present the features, advantages and benefits of products to customers so that a deal can be closed.
- Provide product training to others in the organisation and coach others on the principles of marketing in an organisation.
- Identify brand mix elements and financial implications for decision making.
- Integrate marketing plans with the business process.
- Monitor and control the handling of customers, customer needs and requirements and areas of customer service impact.
- Analyse and interpret marketing information and present marketing data to stakeholders.
- Establish and develop customer needs and relationships to improve sales and relationships.
- Develop, implement and monitor customer activity plans to meet organisational and customer requirements.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- Data gathering processes, its analysis and the drawing of conclusions and making recommendations.
- How to get the best results from a team of marketers or service providers by monitoring and rectifying performance.
- Project plans and their successful conclusion.
- Communications models and strategies and the elements and processes.
- Customer needs and their identification to enable the production and demonstration of features, advantages and benefits.
- Training and coaching environment establishment and implementation.
- Product and service selling methods, techniques and principles.
- Brand influences and familiarity factors.
- Financial statement analysis and evaluation.
- Marketing activities and the issues, roles and characteristics that affect them.
- Customer service providers and their interaction to establish satisfied customers by interpreting and meeting customer needs and all areas that impact on customer service levels.
- Marketing data, its analysis; interpretation and presentation to all stakeholders.
- Customer needs and relationships, their establishment, maintenance and evaluation.
- Customer activity plans, their development and communication to all stakeholders.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Marketing Communications Qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Customer Management industry, learners may also be able to follow a career in

- General Marketing
- Customer Services
- Direct Selling
- Sales
- Marketing Consulting
- Merchandising
- Marketing Management

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector e.g. FMCG; Retail, Wholesale, Motor; Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc.

A learner could follow a career in the Customer Management field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 5	Cr	Total
Fundamental	Use a range of electronic media to sell an idea to a range of stakeholders	40	40
	Present data based on sound information technology practices	40	40
			80
Core	Conduct a marketing situational analysis	5	5
	Lead a team of marketers and service providers	10	10
	Develop, implement and manage a project / activity plan	5	5
	Implement a generic communication strategy	10	10
	Identify product features, advantages and benefits to the customer	10	10
	Provide product training to others in the organisation	10	10
	Close a deal with a customer	5	5
	Identify brand mix elements	8	8
	Identify financial implications for making decisions	8	8
	Integrate marketing plans with business process	6	6
	Coach others on principles of marketing in an organisation	5	5
	Monitor handling of customers by frontline customer service	6	6
	Manage customer requirements and needs and implement action plans	8	8
	Identify and manage areas of customer service impact	6	6
	Present data to stakeholders	5	5
	Analyse and interpret data and marketing information	8	8
			115
Elective	Establish customer needs and relationships	16	16
	Develop customer needs and relationships	16	16
	Develop and implement customer activity plans to reach agreement	16	16
			48

UNIT STANDARDS IN NATIONAL DIPLOMA IN CUSTOMER MANAGEMENT NQF LEVEL 5

UNIT STANDARDS ON NQF LEVEL 5

Core

1. Title Conduct a marketing situational analysis
2. Title Lead a team of marketers and service providers
3. Title Develop, implement and manage a project / activity plan
4. Title Implement a generic communication strategy
5. Title Identify product features, advantages and benefits to the customer
6. Title provide product training to others in the organisation
7. Title Close a deal with a customer
8. Title Identify brand mix elements
9. Title Identify financial implications for making decisions
10. Title Integrate marketing plans with business process
11. Title Coach others on principles of marketing in an organisation
12. Title Monitor handling of customers by frontline customer service
13. Title Manage customer requirements and needs and implement action plans
14. Title Identify and manage areas of customer service impact
15. Title Present data to stakeholders
16. Title Analyse and interpret data and marketing information

Elective

17. Title Establish customer needs and relationships
18. Title Develop customer needs and relationships
19. Title Develop and implement customer activity plans to reach agreement

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL DIPLOMA IN CUSTOMER MANAGEMENT NQF LEVEL 5

UNIT STANDARDS ON NQF LEVEL 5

1. Title Conduct a marketing situational analysis

Specific Outcome	1.1	Gather data relating to project from the environment
Specific Outcome	1.2	Analyse data for the marketing situational analysis
Specific Outcome	1.3	Draw conclusion and make recommendations
2. Title Lead a team of marketers and service providers

Specific Outcome	2.1	Set objectives for marketing team
Specific Outcome	2.2	Coach marketing staff to be able to achieve objectives
Specific Outcome	2.3	Monitor performance of marketing staff against targets
Specific Outcome	2.4	Provide feedback on performance
Specific Outcome	2.5	Take corrective action as needed

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| 3. | Title | | Develop, implement and manage a project / activity plan |
| | Specific Outcome | 3.1 | Evaluate proposals and select preferred option |
| | Specific Outcome | 3.2 | Conceptualise plan |
| | Specific Outcome | 3.3 | Delegate tasks |
| | Specific Outcome | 3.4 | Track project |
| 4. | Title | | Implement a generic communication strategy |
| | Specific Outcome | 4.1 | Identify and explain a generic communications model |
| | Specific Outcome | 4.2 | Analyse, interpret and implement a generic communication strategy |
| 5. | Title | | Identify product features, advantages and benefits to the customer |
| | Specific Outcome | 5.1 | Identify needs of the customer |
| | Specific Outcome | 5.2 | Present features, advantages and benefits to the customer |
| | Specific Outcome | 5.3 | Demonstrate features, advantages and benefits |
| 6. | Title | | Provide product training to others in the organisation |
| | Specific Outcome | 6.1 | Establish an environment conducive to learning and development needs |
| | Specific Outcome | 6.2 | Implement the product training activities |
| 7. | Title | | Close a deal with a customer |
| | Specific Outcome | 7.1 | Apply personal selling skills to sell products or services |
| | Specific Outcome | 7.2 | Apply closing techniques to sell products or services |
| 8. | Title | | Identify brand mix elements |
| | Specific Outcome | 8.1 | Describe factors influencing branding |
| | Specific Outcome | 8.2 | Explain brand familiarity |
| 9. | Title | | Identify financial implications for making decisions |
| | Specific Outcome | 9.1 | Evaluate financial statements against reporting requirements. |
| | Specific Outcome | 9.2 | Apply financial analysis tools to interpret and report on financial implications |

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| 10. | Title | Integrate marketing plans with business process |
| Specific Outcome | 10.1 | Monitor the marketing environment and determine variables for marketing activities |
| Specific Outcome | 10.2 | Distinguish the role of marketing research and marketing information systems in investigating and understanding the operations of the market place |
| Specific Outcome | 10.3 | Distinguish characteristics of major markets |
| Specific Outcome | 10.4 | Identify influences on consumer behaviour in relation to marketing activities |
| 11. | Title | Coach others on principles of marketing in an organisation |
| Specific Outcome | 11.1 | Describe marketing principles and ethics to others |
| Specific Outcome | 11.2 | Develop and implement a coaching / monitoring plan |
| Specific Outcome | 11.3 | Develop and implement a monitoring programme |
| Specific Outcome | 11.4 | Monitor events of a "marketing culture" in the organisation |
| 12. | Title | Monitor handling of customers by frontline customer service |
| Specific Outcome | 12.1 | Monitor interaction between customer service providers and the customer |
| Specific Outcome | 34.2 | Monitor the customer's satisfaction |
| Specific Outcome | 34.3 | Monitor key performance areas |
| 13. | Title | Manage customer requirements and needs and implement action plans |
| Specific Outcome | 13.1 | Listen to and interpret customer needs |
| Specific Outcome | 13.2 | Describe action plan |
| Specific Outcome | 13.3 | Implement action plan to meet customer's needs |
| Specific Outcome | 13.4 | Track and measure the action plan to its completion |
| 14. | Title | Identify and manage areas of customer service impact |
| Specific Outcome | 14.1 | Identify "touch points" of customers |
| Specific Outcome | 14.2 | Determine solutions in areas of customer service |
| Specific Outcome | 14.3 | Action change or improve areas of customer service |
| 15. | Title | Present data to stakeholders |
| Specific Outcome | 15.1 | Develop the presentation of data to stakeholders |
| Specific Outcome | 15.2 | Present data to stakeholders |

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| 16. Title | Analyse and interpret data and marketing information |
| Specific Outcome | 16.1 Analyse data and marketing information |
| Specific Outcome | 16.2 Interpret data and marketing information |
| 17. Title | Establish customer needs and relationships |
| Specific Outcome | 17.1 Distinguish customer purchasing motives and behaviours. |
| Specific Outcome | 17.2 Assess and respond to customer needs. |
| 18. Title | Develop customer needs and relationships. |
| Specific Outcome | 18.1 Initiate interpersonal communication with sales customers. |
| Specific Outcome | 18.2 Assess and respond to customer needs. |
| Specific Outcome | 18.3 Maintain and improve customer relationship. |
| 19. Title | Develop and implement customer activity plans to reach agreement. |
| Specific Outcome | 19.1 Develop customer activity plan. |
| Specific Outcome | 19.2 Communicate agreed customer activity plan to relevant stakeholders |
| Specific Outcome | 19.3 Implement and monitor customer activity plan. |
| Specific Outcome | 19.4 Review and evaluate customer activity plans performance. |
| Specific Outcome | 19.5 Develop and maintain customer specific business plans. |
| Specific Outcome | 19.6 Develop time and territory management plan to service customer requirements. |
| Specific Outcome | 19.7 Develop budget for implementation of customer plans. |

No. 1221

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**NATIONAL FIRST DEGREE IN CUSTOMER MANAGEMENT NQF LEVEL 6**

Field: Business, Commerce and Management Studies
Sub-field: Marketing
Level: 6
Credit: 360
Issue date: 31 August 2001
Review date: 01 September 2003

Rational of the qualification

The National First Degree in Customer Management: Level 6 is designed to meet the needs of those learners who want to progress in the field of Marketing and will assist those who make Customer Management their chosen career path. The qualification in Customer Management offers scope for a large variety of talents, displayed by individuals of diverse backgrounds, cultures, and of either gender.

The qualification in marketing can be followed in virtually every sector, i.e. business-to-business marketing, i.e. products or services sold to other businesses; services marketing, i.e. education, real estate, travel and tourism, legal services, etc; fast moving consumer goods, i.e. products people need and use every day; financial services, i.e. banking and insurance.

At the higher levels the Marketing profession needs a set of unit standards against which to align and measure it self.

The National First Degree in Customer Management will provide and offer the skills, knowledge and understanding of marketing that are essential for analysis of market conditions, development of marketing strategies, product and brand development, pricing, distribution (local and international), integrated marketing communication (including advertising, promotions and public relations) and interaction with the customer (through selling and customer service).

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Sales Managers
- Sales Representatives
- National Account Managers
- Key Account Managers
- Channel Managers
- Category Managers
- Telesales Clerks
- Sales Directors
- Client Services Clerks
- Field Marketers

This qualification will help the learner at Level 6 to get the requirements of such a qualification, namely, the general knowledge and understanding of business functions as well as a detailed practical understanding of Customer Management.

The qualification is structured in such a way that exposes individuals to a set of core competences to enable them to function in this role. The electives will provide for more special competence in the area of Customer Management. The qualification will also promote the notion of life-long learning.

Purpose of the qualification

Learners acquiring this qualification would be operating in an advanced environment of Customer Management and will be more involved in the development, enhancement and growth of Customer Management Technologies and practice. Learners will be learning around areas of Strategy, Customer Relations and Marketing Principles. Learners will also be involved with core issues of Marketing Management, Marketing Communications and Marketing Research but will be furthering their specialisation of Customer Management.

Access to the Qualification

As this is a unit standard based qualification, any learner who is competent in the unit standard as required by the core, fundamental and elective components stipulated in the qualification, will have free access to the qualification.

Learning assumed to be in place

Learners accessing this qualification will have demonstrated competence against the standards in the Diploma Marketing Communication or Marketing Research or Marketing Management or Customer Management or equivalent at NQF Level 5.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Articulate a vision and develop a strategic plan to meet the vision.
- Monitor and review activity plans and the performance levels of marketers and service providers.
- Manage all aspects of a communications project and review its effectiveness.
- Assess the sales environment in order to present a range of products and services to meet objectives.
- Identify and manage innovation opportunities and processes.
- Determine, co-ordinate and monitor brand mix decisions and elements.
- Integrate and promote marketing principles, including ethics policies throughout the organization.

- Formulate, design, implement, service delivery systems and processes.
- Measure and analyse customer service delivery systems and processes.
- Identify, design, implements, measure and analyse customer service levels.
- Establish and determine research requirements and design and recommend a research brief.
- Analyse, develop and manage customer strategies and activities to meet business objectives.
- Establish, negotiate, communicate and monitor business initiatives within agreed parameters.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The articulation of vision into strategic marketing objectives and strategies then monitoring activity plans to meet objectives.
- Performance criteria in terms of setting, collecting, comparing and providing feedback on performance.
- Marketing Communications projects, their identification, evaluation, selection, management and review.
- A range of products and services and their presentation in line with objectives and time frames.
- Innovation as an important part of marketing and its successful implementation in an organisation.
- Brand mix and the role variables and brand mix decision have on outcomes.
- Marketing principles and ethics and the importance of promoting and integrating these into marketing policy.
- Customer service levels, measurement and analysis and the design and implementation of customer service delivery systems.
- Research requirement, their establishment and systems and the design of a research brief.
- Customer strategies and activities, their analysis, development, implementation, monitoring and control.
- Business initiatives are established, negotiated and communicated to all relevant parties and within agreed parameters.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Customer Management qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Customer Management industry, learners may also be able to follow a career in

- General Marketing
- Customer Services
- Direct Selling
- Sales
- Marketing Consulting
- Merchandising
- Marketing Management

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector e.g. EMCG; Retail, Wholesale, Motor; Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc

A learner could follow a career in the Customer Management field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Services SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
- Assessment and moderation of assessment will be overseen by the relevant ETQA according to the ETQAs policies and guidelines for assessment and moderation; in terms of agreements reached around assessment and moderation between ETQAs (including professional bodies); and in terms of the moderation guideline detailed immediately below.
- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 6	Cr	Total
Fundamental	Present a strategy using creative means to a range of stakeholders	60	60
	Interpret historical data and present a range of formula to influence decision making	60	60
			120
Core	Develop a strategic plan	15	15
	Monitor and review activity plan	7	7
	Monitor performance of marketers and service providers	10	10
	Manage a communications projects	15	15
	Present a range of products or services	15	15
	Identify innovation opportunities	15	15
	Integrate brand mix elements	15	15
	Promote principles of Marketing throughout organisations	8	8
	Integrate ethics policy into marketing policy	6	6
	Measure and analyse customer service level	12	12
	Formulate, design and implement customer service delivery systems and processes	8	8
	Conceptualise and research requirements	10	10
	Design a research brief	10	10
			146
Elective	Develop and manage customer strategies to meet business objectives	42	42
	Establish, negotiate and communicate business initiatives within agreed parameters	52	52
			94

UNIT STANDARDS IN NATIONAL FIRST DEGREE IN CUSTOMER MANAGEMENT NQF LEVEL 6**UNIT STANDARDS ON NQF LEVEL 6****Core**

1. Title Develop a strategic plan
2. Title Monitor and review activity plan
3. Title Monitor performance of marketers and service providers
4. Title Manage a communications projects
5. Title Present a range of products or services
6. Title Identify innovation opportunities
7. Title Integrate brand mix elements
8. Title Promote principles of Marketing throughout organisations
9. Title Integrate ethics policy into marketing policy
10. Title Measure and analyse customer service level
11. Title Formulate, design and implement customer service delivery systems and processes
12. Title Conceptualise and research requirements
13. Title Design a research brief

Elective

14. Title Develop and manage customer strategies to meet business objectives
15. Title Establish, negotiate and communicate business initiatives within agreed parameters

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL FIRST DEGREE IN CUSTOMER MANAGEMENT NQF LEVEL 6**UNIT STANDARDS ON NQF LEVEL 6**

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|------------------|-------|---|
| 1. | Title | Develop a strategic plan. |
| Specific Outcome | 1.1 | Articulate the vision in a marketing context |
| Specific Outcome | 1.2 | Analyse possible long term trends with macro, micro, market and competitor environments |
| Specific Outcome | 1.3 | Develop strategic marketing objectives |
| Specific Outcome | 1.4 | Develop alternative long-term strategies |
| Specific Outcome | 1.5 | Evaluate and recommend "best " strategy |

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| 2. | Title | Monitor and review activity plan |
| Specific Outcome | 2.1 | Check activities to be performed in activity plans |
| Specific Outcome | 2.2 | Evaluate results |
| Specific Outcome | 2.3 | Develop options to counteract variances |
| Specific Outcome | 2.4 | Evaluation of options |
| Specific Outcome | 2.5 | Made recommendations |
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| 3. | Title | Monitor performance of marketers and service providers |
| Specific Outcome | 3.1 | Set performance criteria |
| Specific Outcome | 3.2 | Collect relevant data |
| Specific Outcome | 3.3 | Compare actual to standard |
| Specific Outcome | 3.4 | Give feedback to marketers and service providers |
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| 4. | Title | Manage a communications projects |
| Specific Outcome | 4.1 | Identify, evaluate and select the communications methods and format |
| Specific Outcome | 4.2 | Manage the communications project implementation |
| Specific Outcome | 4.3 | Review the communications project effectiveness |
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| 5. | Title | Present a range of products or services |
| Specific Outcome | 5.1 | Establish objectives for presenting a range of products or services |
| Specific Outcome | 5.2 | Assess the internal and external sales environment |
| Specific Outcome | 5.3 | Present a range of products or services |
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| 6. | Title | Identify innovation opportunities |
| Specific Outcome | 6.1 | Identify and examine processes and methods to facilitate innovation within an organisation |
| Specific Outcome | 6.2 | Lead and manage innovation processes within an organisation |
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| 7. | Title | Integrate brand mix elements |
| Specific Outcome | 7.1 | Determine variables of the brand mix |
| Specific Outcome | 7.2 | Confirm, co-ordinate and monitor brand mix decisions |
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| 8. | Title | Promote principles of Marketing throughout organisations |
| Specific Outcome | 8.1 | Design and develop appropriate programme to achieve desired culture |
| Specific Outcome | 8.2 | Implement programme to achieve desired culture |
| Specific Outcome | 8.3 | Evaluate programme |

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|-----|------------------|------|---|
| 9. | Title | | Integrate ethics policy into marketing policy |
| | Specific Outcome | 9.1 | Ensure that ethics are integrated into the marketing programme |
| | Specific Outcome | 9.2 | Evaluate marketing ethics practices |
| | Specific Outcome | 9.3 | Correct unethical marketing practices |
| 10. | Title | | Measure and analyse customer service level |
| | Specific Outcome | 10.1 | Identify factors which influence customer service and perceptions |
| | Specific Outcome | 10.2 | Design methodologies to measure factors and perceptions of customer service |
| | Specific Outcome | 10.3 | Implement customer service measurement processes and collect data |
| | Specific Outcome | 10.4 | Analyse measurement results of customer service levels |
| 11. | Title | | Formulate, design and implement customer service delivery systems and processes |
| | Specific Outcome | 11.1 | Developing and implementing an action plan to achieve desired service levels |
| | Specific Outcome | 11.2 | Monitor progress and effectiveness of action plans implemented |
| 12. | Title | | Conceptualise and research requirements |
| | Specific Outcome | 12.1 | Establish research requirements |
| | Specific Outcome | 12.2 | Determine research requirement systems |
| 13. | Title | | Design a research brief |
| | Specific Outcome | 13.1 | Assess and recommend a research brief |
| | Specific Outcome | 13.2 | Design a research brief to optimise results. |
| 14. | Title | | Develop and manage customer strategies to meet business objectives |
| | Specific Outcome | 14.1 | Analyse and assess customer strategies and activities |
| | Specific Outcome | 14.2 | Develop customer strategy to meet business objectives |
| | Specific Outcome | 14.3 | Implement approved customer strategy plans |
| | Specific Outcome | 14.4 | Monitor and control customer strategy performance |

15.	Title	Establish, negotiate and communicate business initiatives within agreed parameters
Specific Outcome	15.1	Develop a proposal / presentation to meet customer's needs and expectations
Specific Outcome	15.2	Proposal is presented to customers in order to enhance acceptance
Specific Outcome	15.3	Secure agreement for the proposal
Specific Outcome	15.4	Monitor, review and evaluate presentation acceptance

No. 1222

21 November 2001

SOUTH AFRICAN QUALIFICATIONS AUTHORITY**NATIONAL SECOND DEGREE IN CUSTOMER MANAGEMENT NQF LEVEL 7**

Field:	Business, Commerce and Management Studies
Sub-field:	Marketing
Level:	7
Credit:	514
Issue date:	31 August 2001
Review date:	01 September 2003

Rationale of the qualification

The National Second Degree in Customer Management: Level 7 is designed to meet the needs of those learners who want to progress in the field of Marketing and will assist those who make Customer Management their chosen career path. The qualification in Customer Management offers scope for a large variety of talents, displayed by individuals of diverse backgrounds, cultures, and of either gender.

The qualification in marketing can be followed in virtually every sector, i.e. business-to-business marketing, i.e. products or services sold to other businesses; services marketing, i.e. education, real estate, travel and tourism, legal services, etc; fast moving consumer goods, i.e. products people need and use every day; financial services, i.e. banking and insurance.

At the higher levels the Marketing profession needs a set of unit standards against which to align and measure it self.

The National Second Degree in Customer Management will provide and offer the skills, knowledge and understanding of marketing that are essential for analysis of market conditions, development of marketing strategies, product and brand development, pricing, distribution (local and international), integrated marketing communication (including advertising, promotions and public relations) and interaction with the customer (through selling and customer service).

Many different roles and careers are linked to and affected by this qualification. They include, but are not limited to:

- Sales Managers
- Sales Representatives
- National Account Managers
- Key Account Managers
- Channel Managers
- Category Managers
- Telesales Clerks
- Sales Directors
- Client Services Clerks
- Field Marketers

This qualification will help the learner at Level 7 to get the requirements of such a qualification, namely, the general knowledge and understanding of business functions as well as a detailed practical understanding of Customer Management.

The qualification is structured in such a way that exposes individuals to a set of core competences to enable them to function in this role. The electives will provide for more special competence in the area of Customer Management. The qualification will also promote the notion of life-long learning.

Purpose of the qualification

This higher degree will allow learners to operate at a strategic and conceptual level in designing and strategising new technologies, methodologies and techniques of furthering the purposes and benefits of Customer Management.

Access to the Qualification

As this is a unit standard based qualification, any learner who is competent in the unit standard as required by the core, fundamental and elective components stipulated in the qualification, will have free access to the qualification.

Learning assumed to be in place

Learners accessing this qualification will have demonstrated competence against the standards in the National Degree – Customer Management or equivalent NQF 6.

Exit level Outcomes

On achieving this qualification, the learner will be able to:

- Analyse and evaluate global trends and develop a vision for an organization.
- Develop a monitoring system and evaluate and monitor a strategic marketing plan.
- Monitor and control all aspects of an internal or external marketing unit.
- Interpret a brief and develop a public relations and marketing campaign.
- Develop, plan and review alternative marketing opportunities.
- Assess current marketing culture and set marketing culture and ethics objectives to instill a marketing culture and ethics in all stakeholder groups.
- Create and maintain a positive culture of customer service in the supply chain and conceptualise innovative customer service strategies.
- Develop, assess and write research policies and sponsor research activities for market research projects.

- Design and develop customer acquisition and retention strategies and manage specialized areas in Customer Management processes to meet corporate business objectives.
- Set sales procedures and policies for the organization and develop and monitor annual sales plans and objectives.

Associated Assessment Criteria

In particular assessors should check that the learner must demonstrate an ability to consider a range of options and make decisions about:

- The overall process for developing an organisation vision.
- The strategic marketing plans development and evaluation.
- The process for starting and structuring a marketing unit and the application of financial plans and controls.
- Public relations and marketing campaigns are defined and interpreted strategies developed to meet requirements.
- The involvement of all stakeholders to develop alternative opportunities.
- Marketing culture establishment in all stakeholder groups.
- Marketing best practice ethics are established, set and implemented within given resource constraints.
- Customer service culture is developed and innovative systems conceptualised to meet objectives.
- Research projects are identified, sponsored and monitored.
- Research policies are developed, agreed and recommended and assist organisation to meet its objectives.
- Customer service and relations strategies are designed, developed and managed to build customers base.
- Sales procedures and policies are set and sales plans are developed and monitored to meet targets.

International comparability

Benchmarking was done by comparison to Unit Standards / Outcomes of learning against

- New Zealand Qualifications
- Australian Qualification
- NVQ Qualifications from Britain and
- IMM Qualifications

Integrated Assessment

Because assessment practices must be open, transparent, fair, valid, reliable and ensure that no learner is disadvantaged in any way whatsoever, an integrated assessment approach is incorporated into the qualification.

As it is a Unit Standard based Qualification, both formative and summative assessment processes are accounted for.

Recognition of prior learning

The structure of this Unit Standard based Qualification makes the recognition of Prior Learning possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Customer Management qualification.

This recognition of Prior Learning may allow:

- For accelerated access to further learning
- Gaining of credits towards a unit standard

All recognition of Prior Learning is subject to quality assurance by services SETA or a relevant accredited ETQA and is conducted by an accredited workplace assessor.

Articulation possibilities

On completion of this qualification, besides careers in the formal Customer Management industry, learners may also be able to carry out careers in

- General Marketing
- Customer Services
- Direct Selling
- Sales
- Marketing Consulting
- Merchandising
- Marketing Management

Note:

1. The above is an indication rather than an exhaustive listing
2. In addition learners can specialise in an industry sector e.g. FMCG; Retail, Wholesale, Motor; Insurance etc
3. Learners can also become even more specialised such as Call Center; Internet Marketing; Point of Sale etc

A learner could follow a career in the Customer Management field focusing on FMCG and undertaking it in Call Centers.

Moderation Options

- Anyone assessing a learner or moderating the assessment of a learner against this Qualification must be registered as an assessor with the Service SETA ETQA.
- Any institution offering learning that will enable the achievement of this Qualification must be accredited as a provider with the Services SETA ETQA.
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- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

Anyone wishing to be assessed against this Qualification may apply to be assessed by any assessment agency, assessor or provider institution that is accredited by the Services SETA ETQA.

Criteria for registration of assessors

For an applicant to register as an assessor, the applicant needs:

- A minimum of 2 (two) years' practical, relevant occupational experience
- Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA
- Detailed documentary proof of educational qualification, practical training undergone, and experience gained by the applicant must be provided (Portfolio of evidence)

	Level 7	Cr	Total
Fundamental	Present a national strategy benchmarked to add value internationally	70	70
	Establish scenarios of best practice	70	70 60
			140
Core	Develop a vision for an organisation	20	20
	Monitor and evaluate a strategic marketing plan	20	20
	Manage a Marketing Unit (Internal or External)	60	60
	Develop a public relations and marketing campaign	20	20
	Generate alternative opportunities	10	10
	Instill Marketing culture in all stakeholder groups	8	8
	Set Marketing Ethics Policy	8	8
	Create a culture of customer service in the supply chain	20	20
	Conceptualise innovative customer service systems and strategies	30	30
	Sponsor research projects	10	10
	Set research policy	10	10
			216
Elective	Design and develop customer acquisition and retention strategies to meet corporate business strategies.	40	40
	Manage specialised areas in customer management processes.	40	40
	Set sales procedures and policies to meet business strategic plan	40	40
	Develop and monitor an annual sales plan	40	40
			160

UNIT STANDARDS IN NATIONAL SECOND DEGREE IN CUSTOMER MANAGEMENT NQF LEVEL 7

UNIT STANDARDS ON NQF LEVEL 7

Core

1. Title Develop a vision for an organisation
2. Title Monitor and evaluate a strategic marketing plan
3. Title Manage a Marketing Unit (Internal or External)
4. Title Develop a public relations and marketing campaign
5. Title Generate alternative opportunities
6. Title Instill Marketing culture in all stakeholder groups
7. Title Set Marketing Ethics Policy
8. Title Create a culture of customer service in the supply chain
9. Title Conceptualise innovative customer service systems and strategies
10. Title Sponsor research projects
11. Title Set research policy

Elective

12. Title Design and develop customer acquisition and retention strategies to meet corporate business strategies.
13. Title Manage specialised areas in customer management processes.
14. Title Set sales procedures and policies to meet business strategic plan
15. Title Develop and monitor an annual sales plan

UNIT STANDARDS AND SPECIFIC OUTCOMES IN NATIONAL SECOND DEGREE IN CUSTOMER MANAGEMENT NQF LEVEL 7

UNIT STANDARDS ON NQF LEVEL 7

- | | | |
|------------------|-------|---|
| 1. | Title | Develop a strategic plan. |
| Specific Outcome | 1.1 | Articulate the vision in a marketing context |
| Specific Outcome | 1.2 | Analyse possible long term trends with macro, micro, market and competitor environments |
| Specific Outcome | 1.3 | Develop strategic marketing objectives |
| Specific Outcome | 1.4 | Develop alternative long-term strategies |
| Specific Outcome | 1.5 | Evaluate and recommend "best " strategy |

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|------------------|-------|--|
| 2. | Title | Monitor and review activity plan |
| Specific Outcome | 2.1 | Check activities to be performed in activity plans |
| Specific Outcome | 2.2 | Evaluate results |
| Specific Outcome | 2.3 | Develop options to counteract variances |
| Specific Outcome | 2.4 | Evaluation of options |
| Specific Outcome | 2.5 | Made recommendations |
| 3. | Title | Monitor performance of marketers and service providers |
| Specific Outcome | 3.1 | Set performance criteria |
| Specific Outcome | 3.2 | Collect relevant data |
| Specific Outcome | 3.3 | Compare actual to standard |
| Specific Outcome | 3.4 | Give feedback to marketers and service providers |
| 4. | Title | Manage a communications projects |
| Specific Outcome | 4.1 | Identify, evaluate and select the communications methods and format |
| Specific Outcome | 4.2 | Manage the communications project implementation |
| Specific Outcome | 4.3 | Review the communications project effectiveness |
| 5. | Title | Present a range of products or services |
| Specific Outcome | 5.1 | Establish objectives for presenting a range of products or services |
| Specific Outcome | 5.2 | Assess the internal and external sales environment |
| Specific Outcome | 5.3 | Present a range of products or services |
| 6. | Title | Identify innovation opportunities |
| Specific Outcome | 6.1 | Identify and examine processes and methods to facilitate innovation within an organisation |
| Specific Outcome | 6.2 | Lead and manage innovation processes within an organisation |
| 7. | Title | Integrate brand mix elements |
| Specific Outcome | 7.1 | Determine variables of the brand mix |
| Specific Outcome | 7.2 | Confirm, co-ordinate and monitor brand mix decisions |
| 8. | Title | Promote principles of Marketing throughout organisations |
| Specific Outcome | 8.1 | Design and develop appropriate programme to achieve desired culture |
| Specific Outcome | 8.2 | Implement programme to achieve desired culture |
| Specific Outcome | 8.3 | Evaluate programme |

- | | | | |
|-----|------------------|------|--|
| 9. | Title | | Integrate ethics policy into marketing policy |
| | Specific Outcome | 9.1 | Ensure that ethics are integrated into the marketing programme |
| | Specific Outcome | 9.2 | Evaluate marketing ethics practices |
| | Specific Outcome | 9.3 | Correct unethical marketing practices |
| 10. | Title | | Measure and analyse customer service level |
| | Specific Outcome | 10.1 | Identify factors which influence customer service and perceptions |
| | Specific Outcome | 10.2 | Design methodologies to measure factors and perceptions of customer service |
| | Specific Outcome | 10.3 | Implement customer service measurement processes and collect data |
| | Specific Outcome | 10.4 | Analyse measurement results of customer service levels |
| 11. | Title | | Formulate, design and implement customer service delivery systems and processes |
| | Specific Outcome | 11.1 | Developing and implementing an action plan to achieve desired service levels |
| | Specific Outcome | 11.2 | Monitor progress and effectiveness of action plans implemented |
| 12. | Title | | Design and develop customer acquisition and retention strategies to meet corporate business strategies |
| | Specific Outcome | 12.1 | Analyse and assess customer profiles and base |
| | Specific Outcome | 12.2 | Analyse and assess customer strategies and activities |
| | Specific Outcome | 12.3 | Design, formulate and develop acquisition strategies |
| | Specific Outcome | 12.4 | Produce and set sales and service targets and budgets |
| | Specific Outcome | 12.5 | Do-ordinate and manage resources |
| 13. | Title | | Manage specialised areas in customer management process |
| | Specific Outcome | 13.1 | Manage consumers customer management |
| | Specific Outcome | 13.2 | Manage business-to-business customer management |
| | Specific Outcome | 13.3 | Manage customer management for non-profit organisations |
| | Specific Outcome | 13.4 | Manage customer management for service industry |
| 14. | Title | | Set sales procedures and policies to meet business strategic plan |
| | Specific Outcome | 14.1 | Design and develop sales procedures and policies |
| | Specific Outcome | 14.2 | Implement sales policies and procedures |
| | Specific Outcome | 14.3 | Monitor and review sales policies and procedures |

15.	Title	Develop and monitor an annual sales plan
Specific Outcome	15.1	Write sales plan
Specific Outcome	15.2	Set sales budget
Specific Outcome	15.3	Approve divisional plan
Specific Outcome	15.4	Monitor and evaluate sales plan

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