



# **Assessment Tasks**

## **Candidate Guide**

**BSBSMB403A Market the small business**

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## Assessment Information

The assessment activities associated with the unit of competency **BSBSMB403A Market the small business** are listed below:

<b>Assessment 1: Written</b>	▪ Written answers to questions
<b>Assessment 2: Project</b>	▪ Written responses to tasks
<b>Assessment 3: Project</b>	▪ Written responses to tasks
<b>Assessment 4: Project</b>	▪ Written responses to tasks

This guide contains all of the assessment tasks required for completion of unit of competency **BSBSMB403A Market the small business**.

Prior to commencing the assessments your assessor will explain each task to you. You will be given the opportunity to ask questions and to seek clarification on any of the tasks, and your assessor will remain available to support you through the assessment process.

Your assessor is also available to discuss Recognition of Prior Learning and whether this applies to your circumstances.

## Terms and conditions

### Submitting your evidence portfolio

You are recommended to seek the advice of your assessor when putting together your evidence portfolio in order to confirm that you have provided sufficient evidence of competency.

You should note that your evidence portfolio must be retained by the Registered Training Organisation for audit purposes and will not be returned to you. If you wish to keep any evidence, you should make a copy prior to submission for assessment. You are advised to make sure you clearly label each answer and task and complete all sections of each assessment.

If possible, you should also submit copies of any workplace documents that may be relevant to this unit of competency. In this case you will need to gain approval to provide the copies from your employer.

### Ownership and plagiarism

You are advised by accepting these terms and conditions you have declared the evidence that you submit is your own work or the result of your own research. By signing the declaration below you acknowledge your assessment is your own and contains no material written by another person except where due reference is made. Note that if you quote any source in your evidence, you must provide a reference to the source in order to ensure that you do not breach Copyright legislation. You need to be aware that a false declaration may lead to the withdrawal of a qualification.

### Re-submission of your evidence portfolio

If your evidence meets the requirements of the unit of competency you will be assessed as Competent (**C**) in this unit. If your evidence does not meet the requirements of the unit of competency you will be assessed as Not Yet Competent (**NYC**). If you are assessed NYC, it is important to discuss your re-submission with your assessor as you will be given one opportunity only to revise and re-submit your evidence portfolio.

#### Declaration by Candidate

I confirm that the evidence that I have presented is my own work and/or the result of my own research. It contains no material written by another person except where I have stated the source. I am aware that a false declaration may lead to withdrawal of a qualification.

CANDIDATE NAME (PLEASE PRINT)

CANDIDATE SIGNATURE

DATE

## BSBSMB403A Market the small business

### Elements

#### 1. Develop marketing strategies

*Performance Criteria (PC):*

- 1.1 Analyse the business and its key products or services to determine the focus of marketing activities, in accordance with the objectives of the business plan
- 1.2 Evaluate the customer base and target market for the small business as a basis for the marketing objectives and strategies
- 1.3 Determine marketing objectives and strategies that are ethically and culturally appropriate, in consultation with relevant people and in accordance with the business plan

#### 2. Determine a marketing mix for the business

*Performance Criteria (PC):*

- 2.1 Balance product mix, volumes and pricing to optimise sales and profit
- 2.2 Evaluate the costs and benefits of using different distribution channels and/or providing different levels of customer service and consider the results in determining the marketing mix
- 2.3 Determine promotional activities to suit the target market
- 2.4 Consider customer needs and preferences in determining the marketing mix
- 2.5 Determine the marketing mix according to market and business needs

#### 3. Implement marketing strategies

*Performance Criteria (PC):*

- 3.1 Brief persons involved in the marketing effort on their roles and responsibilities, to ensure the success of marketing strategies
- 3.2 Plan and implement promotional activities, in accordance with marketing objectives and budgetary requirements

#### 4. Monitor and improve marketing performance

*Performance Criteria (PC):*

- 4.1 Monitor marketing activities and evaluate business performance according to the objectives and targets of the business plan
- 4.2 Analyse performance gaps and take corrective action or set new targets
- 4.3 Encourage all relevant people to propose ways to improve marketing performance
- 4.4 Seek and analyse customer reaction to all aspects of the marketing mix, using culturally appropriate processes, to improve targeting and outcomes
- 4.5 Conduct ongoing research of customer requirements to identify opportunities for change and improvement
- 4.6 Monitor and investigate changes in the market for new opportunities to aid business development

### Required Skills

- RS 1. monitor marketing activities and evaluate business performance according to the objectives and targets of the business plan
- RS 2. analyse performance gaps and take corrective action or set new targets

### Required Knowledge

- RK 1. industry market trends
- RK 2. methods of analysing costs and benefits of marketing strategies
- RK 3. methods of developing marketing objectives and marketing mix
- RK 4. methods of monitoring customer satisfaction
- RK 5. relevant market analysis and research
- RK 6. relevant marketing concepts and methods

### Critical aspects of evidence

*Evidence of the following is essential:*

- CAE1. developing a marketing strategy and choosing a marketing mix for the small business that are culturally appropriate and that complement the business plan
- CAE2. implementing and monitoring the marketing strategy/plan to optimise the chances of small business success
- CAE3. knowledge of relevant marketing concepts and methods

### Employability Skills

*Industry and enterprise requirements for the qualification:*

- ES 1. Communication
  - conducting research to collect and analyse information in a range of reports
  - consulting with others to develop a range of plans and reports
  - liaising with stakeholders and promoting participative workplace arrangements
  - negotiating solutions to new and emerging issues
- ES 2. Teamwork
  - contributing to the development of other team members
  - providing feedback on team performance to colleagues and managers
- ES 3. Problem solving
  - applying risk management processes to business operations
  - assessing financial viability of new opportunities and matching organisational capability with market needs
- ES 4. Initiative and enterprise
  - encouraging creative and innovative workplace solutions
  - identifying new and emerging opportunities for the business and developing strategies to capitalise on them
  - managing, fostering and facilitating change
- ES 5. Planning and organising
  - developing systems that are flexible and responsive to changing circumstances
  - planning for contingencies and performance of staff and systems
- ES 6. Self management
  - dealing with contingencies
  - managing own time and priorities
  - taking responsibility as required by work role and ensuring all organisational policies and procedures are adhered to
- ES 7. Learning
  - assisting others to acquire new knowledge and skills to improve team and individual performance
- ES 8. Technology
  - using electronic communication devices and processes such as internet, intranet, email to produce written correspondence and reports
  - using technology to assist the management of information and to assist the planning process

**If at any stage of the assessments, you believe that the safety of anyone is in jeopardy, you should abort the assessment session.**

## Assessment 1: Written Test

Candidate name:

### Instructions to Candidate

You are required to answer the following questions to confirm your knowledge in relation to unit **BSBSMB403A Market the small business**.

You may refer to your training materials and other research while completing the answers.

Write your answers in the spaces below using a blue or black pen. Alternatively type a document and provide a printed copy. If you re-type the document, repeat each question in the document and type your answer under the question.

Questions and Candidate's answers		Satisfactory (✓)
Question 1.	Identify two reasons why it is important to identify and monitor industry market trends.	
Question 2.	In any method used to analyse costs and benefits of a marketing strategy, all costs, benefits and uncertainties need to be identified. How do these cost, benefits and uncertainties need to be presented for an effective comparative analysis? (i.e. In what type of terms)?	
Question 3.	A method to develop the marketing objectives (or goals) of a business is to use the SMARTT formula. a) What words create this acronym? b) What is the purpose of the marketing objective?	

Questions and Candidate's answers	Satisfactory (✓)
<p>Question 4. What are the four Ps that need to be considered when developing the marketing mix?</p>	
<p>Question 5. Methods for monitoring customer satisfaction include using primary and secondary sources of qualitative data and quantitative data. Explain the meaning of each of these terms. Use a phone interview and questionnaire as examples to illustrate your answer.</p> <ul style="list-style-type: none"> <li>• Primary sources</li> <li>• Secondary sources</li> <li>• Qualitative data</li> <li>• Quantitative data</li> </ul>	
<p>Question 6. Market research should be objective, impartial and fact-finding. List three items that business managers are trying to identify from the analysis of market research.</p>	
<p>Question 7. In marketing concepts, explain the meaning of market segmentation.</p>	



Questions and Candidate's answers	Satisfactory (✓)
<p>Question 8. Explain what is meant by this sentence-</p> <p>"The marketing concept is a philosophy of management. It states that satisfying customers' wants is the economic and social justification for the existence of a business."</p>	
<p>Question 9. If a business is conducting a SWOT on their marketing activities, what are they analysing?</p>	
<p>Question 10. When pricing a product, you need to consider customers perceptions and demand elasticity.</p> <p>a) What is demand elasticity?</p> <p>b) How does it affect the price of products?</p>	
<p style="text-align: right;"><b>Total Questions</b></p>	<p style="text-align: center;"><b>10</b></p>
<p style="text-align: right;"><b>Result</b></p>	

Assessment 1 Checklist			
Candidate name			Student Number
Unit	BSBSMB403A Market the small business		
Assessor name			
<b>Candidate Assessment Declaration</b> (tick the relevant box)			
The purpose and outcomes of the assessment have been explained to me		Yes	<input type="checkbox"/> No <input type="checkbox"/>
I have received information about the unit of competency		Yes	<input type="checkbox"/> No <input type="checkbox"/>
I understand the type of evidence to be collected		Yes	<input type="checkbox"/> No <input type="checkbox"/>
The appeals system has been explained to me		Yes	<input type="checkbox"/> No <input type="checkbox"/>
I have informed my assessor of any special needs that may need to be considered during the assessment		Yes	<input type="checkbox"/> No <input type="checkbox"/>
Candidate signature		Date	
<b>Assessor comments</b> (tick the relevant box)			
RPL / accelerated progression required		Yes	<input type="checkbox"/> No <input type="checkbox"/>
Language / Literacy / Numeracy support required		Yes	<input type="checkbox"/> No <input type="checkbox"/>
Any other special needs (describe in the space below)		Yes	<input type="checkbox"/> No <input type="checkbox"/>
Assessor signature		Date	
<b>Result of assessment - Assessment 1: Written Test</b>			
Attempt No 1: S <input type="checkbox"/> NYS <input type="checkbox"/>		Attempt No 2: S <input type="checkbox"/> NYS <input type="checkbox"/>	
		Attempt No 3: S <input type="checkbox"/> NYS <input type="checkbox"/>	
The candidate's overall performance was		Satisfactory <input type="checkbox"/> Not Yet Satisfactory <input type="checkbox"/>	
Feedback to candidate on overall performance			
Assessor signature		Date	
I intend to lodge an appeal on the above decision		Yes	<input type="checkbox"/> No <input type="checkbox"/>
Candidate signature		Date	

Candidate name:

## Assessment 2: Project

### Instructions to Candidate

This activity is related to the unit of competency **BSBSMB403A Market the small business**. In particular, you will be required to demonstrate your skills and knowledge in relation to this unit of competency.

You may refer to your training materials and other research if required. The activity may be completed in the workplace or a simulated workplace.

Your assessor will use a checklist to record the assessment decision.

### Overview

Below are a number of practical tasks to be completed over a period of time in a real or simulated workplace where you will perform the duties of a **manager**. The times for completion of the tasks are to be negotiated between yourself and the assessor. The tasks will reflect your ability to:

Project: Develop a marketing strategy suitable for an existing or new business.

Your assessor will provide you with instructions and complete a checklist on which they will record your satisfactory performance of workplace tasks.

The Project Tasks table below identifies the documents that you are required to prepare and submit in your evidence portfolio. They may be presented in printed format in a folder or as an electronic copy.

Ensure both your name and student number is clearly displayed.

### Project Tasks

The following tasks may be completed as a workplace project based on your own organisation and job role, or as a simulated workplace project based on a fictitious organisation, or an organisation you are familiar with.

1. For the organisation where you are the manager, describe the following:

- Type of organisation (retail, wholesale, distributor or service)
- Location of company
- Number of staff
- Your company responsibility level (owner-manager, marketing manager, team leader, manager of a number of departments or branches, etc.). If available, you may provide a position description.
- Industry type (metal products supplier, hairdressing, transport, white goods retailer, etc)
- Type of materials/products and services provided to customers.

Use your current workplace or a simulated workplace to gather the information on the organisation.

You are required to provide your assessor with the following document/s:

- A description of the business.

### Assessor Comments:

Satisfactory ☐ Not Satisfactory ☐

### Project Tasks

2. As the manager you need to ensure the marketing strategy is regularly reviewed to ensure currency within a changing market place. To develop a relevant strategy you need to determine the marketing objectives ensuring they are aligned with the overall business objectives and business plan.

#### Part A- Analyse the business- SWOT

Conduct a situation analysis (SWOT) on the business by examining the internal and external environments that impact on your business, discovering the opportunities and threats to your business and the strengths and weaknesses of the business operations. Use a table format for the SWOT.

In a **report**, show the results of the SWOT and make a comment identifying six key issues that are strengths, weaknesses, opportunities and threats. Sometimes issues can be a strength as well as a weakness.

#### Part B- Identify your target market

In a **report**, using a customer database from Task 1 as well as data on potential customers, identify the customer characteristics of your target market i.e. segment the target market into groups.

## Project Tasks

Some characteristics used to identify customer groups are:

- Demographics- age, gender, income, family size and structure, education, occupation, culture (Culture may relate to factors and groups that may be based on social, ethnic, environmental or other influential factors.)
- Location- country, state, area, region
- Socio-economic class- working class, professional
- Lifestyle- pleasure seeking, achiever, believer
- Personality- compulsive, gregarious, authoritarian, ambitious
- Behaviour- benefits sought, user status, usage rate, loyalty
- Business characteristics- large/small, service demands, credit needs, one-off versus continuous orders, quality requirements, price sensitivity

Part C- Categorise the business products and services

In a **report**, list or use an existing list of products and services from Task 1 and group the products and services into marketable categories. To identify categories, you will need to analyse and understand your customer's needs i.e. consider the segmented target markets of the business.

Part D- Develop marketing objectives and appropriate strategies

In a **report**, describe your marketing objective and the strategies you will use to achieve your marketing objective. Your strategies should be ethically and culturally appropriate for your target market. Your marketing objective should be aligned with the overall business objectives and business plan which reflects the SWOT analysis. You may need to consult with other internal or external relevant people.

The marketing objective should cover three areas under the following objective headings.

- Sales growth
- Profitability
- Innovation

The marketing strategy you choose will depend on your resources and capabilities but the overall strategy should be reflected in your business objectives.

Note: Culture may relate to factors and groups that may be based on social, ethnic, environmental or other influential factors.

Note: Relevant people to consult may include:

- Accountant or other specialist services
- Family members, work team members, sub-contractors, community members
- Franchise agency
- Financial backers, clients
- Owner/operator, partners, directors, shareholders
- Regulatory bodies
- Trade or industry associations.

### Project Tasks

Note: Marketing strategies may include:

- Achieving lower costs of production and distribution than competitors creating a very different product line or service so that the business becomes a class leader in the industry
- Distribution
- Pricing, presentation and display of products/services
- Product design and packaging
- Product range and mix
- Promotion and advertising
- Pursuing cost leadership and/or product differentiation within a specialist market segment.

You are required to provide your assessor with the following document/s:

A report on:

- The SWOT analysis and comments
- The segmented target market
- Categories of products and services
- Marketing objectives and appropriate strategies.

**Assessor Comments:**

Satisfactory ☐ Not Satisfactory ☐

### Project Tasks

**The overall project task:**

Compile all the above documents together. They will be assessed separately and then assessed for overall readability, which includes use of appropriate grammar and punctuation in sentences and paragraphs.

**Assessor Comments:**

Assessment 2 Checklist			
Candidate name			Student Number
Unit	BSBSMB403A Market the small business		
Assessor name			
<b>Candidate Assessment Declaration</b> (tick the relevant box)			
The purpose and outcomes of the assessment have been explained to me		Yes	No
I have received information about the unit of competency		Yes	No
I understand the type of evidence to be collected		Yes	No
The appeals system has been explained to me		Yes	No
I have informed my assessor of any special needs that may need to be considered during the assessment		Yes	No
Candidate signature		Date	
<b>Assessor comments</b> (tick the relevant box)			
RPL / accelerated progression required		Yes	No
Language / Literacy / Numeracy support required		Yes	No
Any other special needs (describe in the space below)		Yes	No
Assessor signature		Date	
<b>Result of assessment - Assessment 2: Project</b>			
Attempt No 1: S <input type="checkbox"/> NYS <input type="checkbox"/>		Attempt No 2: S <input type="checkbox"/> NYS <input type="checkbox"/>	
		Attempt No 3: S <input type="checkbox"/> NYS <input type="checkbox"/>	
The candidate's overall performance was		Satisfactory <input type="checkbox"/> Not Yet Satisfactory <input type="checkbox"/>	
Feedback to candidate on overall performance			
Assessor signature		Date	
I intend to lodge an appeal on the above decision		Yes	No
Candidate signature		Date	

Candidate name:

## Assessment 3: Project

### Instructions to Candidate

This activity is related to the unit of competency **BSBSMB403A Market the small business**. In particular, you will be required to demonstrate your skills and knowledge in relation to this unit of competency.

You may refer to your training materials and other research if required. The activity may be completed in the workplace or a simulated workplace.

Your assessor will use a checklist to record the assessment decision.

### Overview

Below are a number of practical tasks to be completed over a period of time in a real or simulated workplace where you will perform the duties of a **manager**. The times for completion of the tasks are to be negotiated between yourself and the assessor. The tasks will reflect your ability to:

Project: Develop a marketing mix suitable for an existing or new business.

Your assessor will provide you with instructions and complete a checklist on which they will record your satisfactory performance of workplace tasks.

The Project Tasks table below identifies the documents that you are required to prepare and submit in your evidence portfolio. They may be presented in printed format in a folder or as an electronic copy.

Ensure both your name and student number is clearly displayed.



## Project Tasks

The following tasks may be completed as a workplace project based on your own organisation and job role, or as a simulated workplace project based on a fictitious organisation, or an organisation you are familiar with.

- Knowing the break even product price and volume of sales allows a manager to calculate specific sales profits and adjust product volume to increase sales profits. In order to identify an appropriate product mix, managers need to review the break even calculations and identify the most appropriate product mix.

Review the following and in a **report** identify the most appropriate product mix, volumes, and profit sales option and make a comment on why you selected that option.

Option 1				
	Product A \$		Product B \$	Combined \$
Sales (5000 units @ \$2)	10000	Sales (4000 units @ \$2.25)	9000	19000
Net profit	4500	Net profit	2800	7300
Break even point in sales value				9876

Option 2				
20% increase	Product A \$	No change	Product B \$	Combined \$
Sales (6000 units @ \$2)	12000	Sales (4000 units @ \$2.25)	9000	21000
Net profit	6000	Net profit	2800	8800
Break even point in sales value				10000

Option 3				
No change	Product A \$	20% increase	Product B \$	Combined \$
Sales (5000 units @ \$2)	10000	Sales (4800 units @ \$2.25)	10800	19000
Net profit	4500	Net profit	4300	7300
Break even point in sales value				9875

Summary of product mix alternatives				
Product A units	Product B units	Profit \$	Break even point	
5000	4000	7300	9876	
6000	4000	8800	10000	
5000	4800	8860	9875	

You are required to provide your assessor with the following document/s:

- A report that identifies and comments on the most appropriate product mix, volume, and profit sales option to optimise sales and profits.

**Assessor Comments:**

Satisfactory ☐ Not Satisfactory ☐

**Project Tasks**

2. Deciding on the distribution strategy and the different levels of customer service most appropriate for your business is an important decision. The different strategies relate to whether it is a new product or service or an existing product.

In a **report**, explain the costs, considerations and benefits that need to be evaluated in selecting effective distribution channels and levels of customer service for the business marketing mix.

Distribution channels may include:

- Dealer, re-seller, franchisee
- Distributor, delivery service, mail order, telesales
- Self-access, wholesale, retail

Customer service may include:

- After sales service
- One-on-one personal service
- Sales assistance for problems/queries only

You are required to provide your assessor with the following document/s:

- A report explaining the costs, considerations and benefits that are evaluated when selecting effective distribution channels and levels of customer service for the business marketing mix.

**Assessor Comments:**

Satisfactory ☐ Not Satisfactory ☐

**Project Tasks**

3. In Assessment 2 Task 2 you identified the business target market. Using that information, determine the most appropriate promotional activities to suit your target market. You will need to select at least five promotional activities.

In a **report** (table format) using the following headings- Market, Activity, Advantages, Disadvantages:

- List the target market
- List the effective promotional activities
- List the advantages of each promotional activity
- List the disadvantages of each promotional activity.

Promotional activities may include:

- Advertising in national, suburban or local newspapers
- Advertising on radio or television
- Canvassing
- Development of networks and strategic alliances

### Project Tasks

- Display posters
- Exhibitions, in-store promotions
- Involvement in community projects
- Mail drops
- Professional/industry journals
- Sponsorship
- Staff development programs to enhance customer service orientation
- Website
- Word of mouth, referral, testimonials
- Customer loyalty programs

You are required to provide your assessor with the following document/s:

- A report (table format) with the headings- Market, Activity, Advantages, Disadvantages:
  - Listing the various business target markets
  - Listing effective promotional activities (minimum of five)
  - Listing the advantages of each promotional activity
  - Listing the disadvantages of each promotional activity.

### Assessor Comments:

Satisfactory ☐ Not Satisfactory ☐

### Project Tasks

4. Customer needs and preferences need to be considered when developing the market mix. The 4Ps of the marketing mix have been expanded to include a 5<sup>th</sup> P which is People- customers and employees. Customers are at the centre of the marketing universe.

Philip Kotler adjusted the 4Ps marketing mix to be more customer-focused and developed the 4 Cs. In a **report** list the 4Ps and the 4Cs and explain what customer-related factors need to be considered in determining the marketing mix.

You are required to provide your assessor with the following document/s:

- A report on the relationship of the 4Ps and the 4Cs and what customer-related factors need to be considered in determining the marketing mix.

### Assessor Comments:

Satisfactory ☐ Not Satisfactory ☐

### Project Tasks

5. Using the information you have gathered in Assessment 2 and 3, select two products that relate to the business you described in Assessment 2 Task 1 and develop a marketing mix for those two products and that business. Your marketing mix needs to reflect the market segments you identify and the business objectives and business plan.

In a **report** describe and illustrate (i.e. tables, analysis/break even charts, SWOT, etc) the marketing mix for the two products. The following headings may assist in presenting your information.

- Target market- Customer profile/segmentation
- Product and/or service
- Packaging
- Distribution
- Promotion and selling
- Price
- People- staff requirements and relationships with customers and other staff

The marketing mix may include:

- Level of service
- Quality, range
- Product/service safety features
- Technical features, design

You are required to provide your assessor with the following document/s:

- A report on the marketing mix for two products.

### Assessor Comments:

Satisfactory ☐ Not Satisfactory ☐

### Project Tasks

#### The overall project task:

Compile all the above documents together. They will be assessed separately and then assessed for overall readability, which includes use of appropriate grammar and punctuation in sentences and paragraphs.

### Assessor Comments:

Assessment 3 Checklist			
Candidate name			Student Number
Unit	BSBSMB403A Market the small business		
Assessor name			
<b>Candidate Assessment Declaration</b> (tick the relevant box)			
The purpose and outcomes of the assessment have been explained to me		Yes	<input type="checkbox"/> No <input type="checkbox"/>
I have received information about the unit of competency		Yes	<input type="checkbox"/> No <input type="checkbox"/>
I understand the type of evidence to be collected		Yes	<input type="checkbox"/> No <input type="checkbox"/>
The appeals system has been explained to me		Yes	<input type="checkbox"/> No <input type="checkbox"/>
I have informed my assessor of any special needs that may need to be considered during the assessment		Yes	<input type="checkbox"/> No <input type="checkbox"/>
Candidate signature		Date	
<b>Assessor comments</b> (tick the relevant box)			
RPL / accelerated progression required		Yes	<input type="checkbox"/> No <input type="checkbox"/>
Language / Literacy / Numeracy support required		Yes	<input type="checkbox"/> No <input type="checkbox"/>
Any other special needs (describe in the space below)		Yes	<input type="checkbox"/> No <input type="checkbox"/>
Assessor signature		Date	
<b>Result of assessment - Assessment 3: Project</b>			
Attempt No 1: S <input type="checkbox"/> NYS <input type="checkbox"/>		Attempt No 2: S <input type="checkbox"/> NYS <input type="checkbox"/>	
		Attempt No 3: S <input type="checkbox"/> NYS <input type="checkbox"/>	
The candidate's overall performance was		Satisfactory <input type="checkbox"/> Not Yet Satisfactory <input type="checkbox"/>	
Feedback to candidate on overall performance			
Assessor signature		Date	
I intend to lodge an appeal on the above decision		Yes	<input type="checkbox"/> No <input type="checkbox"/>
Candidate signature		Date	

Candidate name:

## Assessment 4: Project

### Instructions to Candidate

This activity is related to the unit of competency **BSBSMB403A Market the small business**. In particular, you will be required to demonstrate your skills and knowledge in relation to this unit of competency.

You may refer to your training materials and other research if required. The activity may be completed in the workplace or a simulated workplace.

Your assessor will use a checklist to record the assessment decision.

### Overview

Below are a number of practical tasks to be completed over a period of time in a real or simulated workplace where you will perform the duties of a **manager**. The times for completion of the tasks are to be negotiated between yourself and the assessor. The tasks will reflect your ability to:

Project: Inform staff of marketing strategies, implement, monitor and improve marketing activities.

Your assessor will provide you with instructions and complete a checklist on which they will record your satisfactory performance of workplace tasks.

The Project Tasks table below identifies the documents that you are required to prepare and submit in your evidence portfolio. They may be presented in printed format in a folder or as an electronic copy.

Ensure both your name and student number is clearly displayed.

### Project Tasks

The following tasks may be completed as a workplace project based on your own organisation and job role, or as a simulated workplace project based on a fictitious organisation, or an organisation you are familiar with.

1. Using the marketing mix from Assessment 3 Task 5, develop a **PowerPoint** presentation to provide advice to staff on their roles and responsibilities so as to ensure success of the marketing strategies. The number of slides should not be more than 12.

You are required to provide your assessor with the following document/s:

- A PowerPoint presentation of no more than 12 slides printed 6 slides per page.

### Assessor Comments:

Satisfactory ☐ Not Satisfactory ☐

### Project Tasks

2. Using the marketing mix from Assessment 3 Task 5, develop a promotional **PowerPoint** presentation for the two products. The presentation must be suitable for a consumer audience and will be presented to staff as part of the initial promotional implementation. Any cultural issues of the target market may need to be considered. The slides may indicate other consumer communication strategies which may include (but not be limited to) advertising, corporate image, direct marketing, merchandising, exhibitions, personal selling, public relations, sales promotions, sponsorship, various media. The number of slides should not be more than 12.

Note: Culture may relate to factors and groups that may be based on social, ethnic, environmental or other influential factors.

Promotional strategies may include:

- Advertising in national, suburban or local newspapers
- Advertising on radio or television
- Canvassing
- Development of networks and strategic alliances
- Display posters
- Exhibitions, in-store promotions
- Involvement in community projects
- Mail drops
- Professional/industry journals
- Staff development programs to enhance customer service orientation
- Website
- Word of mouth, referral, testimonials.

You are required to provide your assessor with the following document/s:

- A PowerPoint presentation of no more than 12 slides printed 6 slides per page.

### Assessor Comments:

Satisfactory ☐ Not Satisfactory ☐

## Project Tasks

3. Incorporating the feedback you received from staff, you have implemented the marketing campaign for the two products. You now need to monitor and identify areas for improvement in marketing activities and business performance.

### Part A- Monitor marketing activities and evaluate business performance

Any business activity plan should be monitored to ensure the plan is achieving its milestones and targets and how effectively and efficiently they are being achieved.

Using a real or simulated example where the two products are being marketed, in a **report**:

- Explain the processes you would use to monitor marketing activities i.e. checklists to review actions are being performed satisfactorily/ unsatisfactorily, identifying areas where plans have unrealistic expectations of staff and resources, budgeted costs are realistic/unrealistic, outcomes of planned activities are achieving/not achieving marketing objectives, etc.
- Explain the methods you would use to measure business performance i.e. sales and profit figures, budget and actual comparisons of unit sales, costs and profits, analysis of market share.

### Part B- Analyse performance gaps and take corrective action

Using the information from Part A on marketing activities, in a **report** identify areas where there are performance gaps and describe the corrective actions or new targets that would need to be implemented.

Performance gaps may include:

- Over achievement of performance targets
- Under achievement of performance targets.

### Part C- Encourage suggestions from staff and customers to improve marketing performance

It is important to gather and analyse feedback from staff and customers on ways to improve marketing performance. In a **report**, list five ways to encourage suggestions from staff and customers. The methods may be monetary or non-monetary.

### Part D- Gather and analyse customer reactions to marketing mix

All marketing mixes need to be reviewed after a period of implementation. This review will identify areas where targets and marketing outcomes can be improved. Using the real or simulated example from Part A explain in a **report** the processes you would use to seek and analyse customer reactions to all aspects of the marketing mix. The processes need to reflect cultural appropriateness. The marketing mix aspects that you need to refer to are:

- Target market- Customer profile/segmentation
- Product and/or service
- Packaging
- Distribution
- Promotion and selling
- Price
- People- staff requirements and relationships with customers and other staff

Customer reactions may be determined through (but are not limited to):

- Customer meetings, focus groups
- Identification of new business opportunities
- Informal discussion
- Sales to contact ratio
- Survey/other feedback mechanisms
- Trend analysis.



## Project Tasks

Note: Culture may relate to factors and groups that may be based on social, ethnic, environmental or other influential factors.

### Part E- Research customer requirements to identify opportunities

Using the real or simulated example from Part A explain in a **report** the advantages and disadvantages of conducting research of customer requirements to identify opportunities for change and improvement. The three market research methods are:

- Face to face interviews
- Telephone survey
- Written questionnaire

### Part F- Monitor market changes

In a **report** explain the processes you would use to monitor and investigate changes in the market to identify new opportunities to aid business development.

The areas you need to discuss include:

- Your research objectives- what you need to know
- Desk research- Available secondary information/data
- Field work- Methods to collect primary information/data
- Data analysis- Extraction, collation and conclusions
- Report- Information and recommendations on areas/opportunities for change and/or improvement.

You are required to provide your assessor with the following document/s:

- A report on:
  - Monitoring marketing activities and evaluate business performance
  - Analysing performance gaps and take corrective action
  - Encouraging suggestions from staff and customers to improve marketing performance
  - Gathering and analysing customer reactions to marketing mix
  - Researching customer requirements to identify opportunities
  - Monitoring market changes.

### Assessor Comments:

Satisfactory ☐ Not Satisfactory ☐

<b>Project Tasks</b>
<b>The overall project task:</b> Compile all the above documents together. They will be assessed separately and then assessed for overall readability, which includes use of appropriate grammar and punctuation in sentences and paragraphs.
<b>Assessor Comments:</b>

Assessment 4 Checklist			
Candidate name			Student Number
Unit	BSBSMB403A Market the small business		
Assessor name			
<b>Candidate Assessment Declaration</b> (tick the relevant box)			
The purpose and outcomes of the assessment have been explained to me		Yes	No
I have received information about the unit of competency		Yes	No
I understand the type of evidence to be collected		Yes	No
The appeals system has been explained to me		Yes	No
I have informed my assessor of any special needs that may need to be considered during the assessment		Yes	No
Candidate signature		Date	
<b>Assessor comments</b> (tick the relevant box)			
RPL / accelerated progression required		Yes	No
Language / Literacy / Numeracy support required		Yes	No
Any other special needs (describe in the space below)		Yes	No
Assessor signature		Date	
<b>Result of assessment - Assessment 4: Project</b>			
Attempt No 1: S <input type="checkbox"/> NYS <input type="checkbox"/>		Attempt No 2: S <input type="checkbox"/> NYS <input type="checkbox"/>	
		Attempt No 3: S <input type="checkbox"/> NYS <input type="checkbox"/>	
The candidate's overall performance was		Satisfactory <input type="checkbox"/> Not Yet Satisfactory <input type="checkbox"/>	
Feedback to candidate on overall performance			
Assessor signature		Date	
I intend to lodge an appeal on the above decision		Yes	No
Candidate signature		Date	

## Summative Assessment Record

Candidate Name	
Unit of Competency	<b>BSBSMB403A Market the small business</b>

Assessment Task	Date of assessment	Satisfactory	Assessor Signature
Assessment 1: Written Test		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Assessment 2: Project		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Assessment 3: Project		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Assessment 4: Project		Yes <input type="checkbox"/> No <input type="checkbox"/>	

Assessor's Comments	

Competent ☐      Not Yet Competent ☐      Re-assessment required ☐

ASSESSOR NAME (PLEASE PRINT)	ASSESSOR SIGNATURE	DATE

I intend to lodge an appeal on the above decision		Yes <input type="checkbox"/>	No <input type="checkbox"/>
Candidate signature		Date	