

CFAM4.6.2

Prepare on outline plan for a field marketing activity



Overview

This is about developing, coordinating and implementing a project plan to run the entire operation of a field marketing campaign. It includes covering all operational aspects, and ensuring that participants are aware of the aspects to be covered by the plan (including the legalities of insurance, employment law and third-party relationships/negotiations).

This unit is recommended for those marketing managers with responsibility for planning field marketing activities. Such managers may be employed directly within an organisation undertaking such activities, or work for an agency/consultancy.

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Performance criteria

- You must be able to:*
- P1 identify and prioritise project objectives and targets which are consistent with the field marketing objectives and required return upon investment
 - P2 identify and agree key actions towards realising the project objectives
 - P3 assess and identify the resources required to achieve the actions within an agreed timescale and budget, determining those resources which will need to be sourced from a third party supplier(s)
 - P4 where necessary, research and select an appropriate third party supplier(s) which fulfils the organisation's requirements
 - P5 brief all parties, ensuring that everyone involved is clear about their allocated responsibilities and their role in achieving the objectives
 - P6 identify and agree data collection, reporting and analysis criteria
 - P7 identify and agree the profile for the field marketing team, including requirements covering their demographics, skills, experience and qualifications
 - P8 identify and agree procedures for monitoring progress against agreed budgets and schedules
 - P9 ensure that the project plan satisfies all relevant legal, industry and organisational guidelines

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Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the role of field marketing and its place within an overall marketing strategy
- K2 field marketing disciplines and their relative benefits
- K3 the components to be covered within a field marketing plan
- K4 typical operational risks associated with field marketing and how to allow for these when developing a plan
- K5 the importance of consulting with colleagues and other stakeholders during the development of a field marketing plan and how to do this effectively
- K6 how to develop measures and methods for monitoring and evaluating performance against the field marketing objectives
- K7 relevant data required in monitoring and evaluating field marketing activities, how to collect it, and the limitations associated with such data
- K8 insurance requirements associated with field marketing
- K9 the importance of agreeing budgets, and of ensuring that these are followed
- K10 the importance of demonstrating a return upon the field marketing investment and how to do this

You need to know and understand:

Industry/sector specific knowledge and understanding

- K11 legal, regulatory and ethical requirements in the organisation's sector, including relevant aspects of employment law affecting the recruitment of field marketing teams
- K12 market developments in the organisation's sector

You need to know and understand:

Context specific knowledge and understanding

- K13 the market in which the organisation works
- K14 the needs and expectations of the organisation's actual and potential customers
- K15 existing and potential marketing opportunities which the organisation is seeking to develop, relevant to your area of operations
- K16 the organisation's key stakeholders, and their needs and expectations

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Additional Information

Behaviours

1. You balance overall marketing objectives and the needs of others with those of the project when allocating resources and responsibilities
2. You set demanding, but achievable objectives
3. You demonstrate behaviour which shows respect, helpfulness and understanding
4. You identify people's information needs
5. You listen actively, ask questions and clarify points to check mutual understanding
6. You encourage people to ask questions
7. You present information clearly, concisely and accurately

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