

## CFAM4.6.3 Implement a field marketing activity



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### Overview

This is about the detailed planning and subsequent implementation of a field marketing activity. It includes addressing the technologies to be used, collecting data, preparing reporting models, and conducting analysis. It also includes recruiting field marketers, covering their appointment, training/briefing and monitoring.

### Who this unit is for

This unit is recommended for those marketers responsible for implementing field marketing activities. Such marketers might 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 Review the operational field marketing plan and confirm and agree a project plan, setting out the activity(ies) to be undertaken, the objectives, actions and resources required
- P2 Identify and create data collection and reporting systems designed to fulfil the monitoring requirements of the field marketing plan
- P3 Develop and agree briefing and training programmes and associated materials for the field marketing team(s) which address their requirements
- P4 Ensure that sufficient field marketing personnel are recruited, briefed and trained to undertake the agreed activity(ies), confirming that everyone involved is clear about their roles and responsibilities
- P5 Ensure that all required material is distributed correctly
- P6 Monitor the field marketing activity(ies) against the agreed plan, budget, and associated targets and objectives
- P7 Identify promptly any variances to the agreed plan and budget, reporting and addressing these correctly
- P8 Monitor the activity(ies) to check that all relevant legal, industry and organisational guidelines are met, addressing any variances promptly and correctly
- P9 Provide ongoing feedback upon the results of the activity(ies) to the relevant person(s) according to an agreed schedule
- P10 Complete agreed quality assurance measures correctly
- P11 Review the outcomes of the field marketing activity(ies) and use your analysis towards informing future activities

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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 The principles of effective project management and how to apply these to implementing field marketing activities
- K3 Field marketing activities and their relative benefits
- K4 Typical data collection and reporting systems appropriate for field marketing activities, and their relative merits
- K5 The importance of ensuring that field marketing teams understand fully their roles and responsibilities, the importance of briefing and training programmes and how to design and implement such programmes
- K6 The importance of delivering within agreed budgets, and the ways of monitoring activities against plans and budgets
- K7 The importance of demonstrating a return upon the field marketing investment and how to do this
- K8 The importance of maintaining confidentiality of data and how to ensure that this occurs

*You need to know and understand:*

##### **Industry/sector specific knowledge and understanding**

- K9 Legal, regulatory and ethical requirements affecting the implementation of field marketing activities, including employment law, and health and safety relating to those involved in field marketing

*You need to know and understand:*

##### **Context specific knowledge and understanding**

- K10 Organisational guidelines affecting field marketing activities
- K11 The organisation's products/services relevant to its field marketing activities
- K12 Reporting procedures within the organisation, and key persons to be kept informed

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#### Additional Information

##### Behaviours

1. You identify people's information and training needs
2. You adopt communication styles appropriate to people and situations
3. You present information clearly, concisely and accurately
4. You listen actively, ask and encourage questions, clarifying points to check mutual

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