



The Chartered  
Institute of Marketing

# Professional Diploma in Marketing

## Marketing Planning Process

**Senior Examiner Assessment Review Report December 2011 and  
March 2012**



## Senior Examiner Assessment Review Report

**UNIT NAME:** Marketing Planning Process

**AWARD NAME:** Professional Diploma in Marketing

**DATE:** December 2011 and March 2012

- **Background to the paper**

The paper was developed around a standard scenario approach that had been widely publicised in advance through tutor training and other materials, to support candidates in their preparation for assessment of the new unit. A revised structure was implemented for this diet with three tasks forming the answer. The appendix could include a maximum of an additional three sides of A4, to include other schedules and tables for the marketing plan and also a background to the organisation, but with no marks awarded.

The assignment was designed to offer the opportunity for candidates to apply the tasks to their own organisation, or an organisation of their choice. This would be particularly advantageous to those employed candidates who might be able to address an issue relating to their work situation that in turn relate it to marketing planning. However, the broad nature of the scenarios should not have precluded anyone who was not in a work situation to be able to tackle the tasks in an equally rigorous way. It is important to stress the need for submissions to be the whole work of the individual candidate.

Hence, the scenario proposed was very general and related to implementing a marketing plan for market entry. It was felt that this should offer an opportunity for all candidates to be able to apply the tasks in a work-related or other selected situation.

Three tasks were set: preparation of a marketing audit (10%); development of a medium-term marketing plan (40%), and an evaluation report (40%); and a further 10% of marks were allocated for presentation.

The tasks were designed to elicit both the level of understanding of marketing planning theory and its application in practice, and the nature of the paper reflected this. Hence, the process of marketing planning needed to be put in the organisational context and in the setting of the scenario. A marketing audit needed to be undertaken that assessed the current position of the chosen organisation, through evaluating the internal and external environments. The audit would be followed by a medium-term marketing plan that focused on either the opportunities or threats to a product or service currently offered by their organisation, as a result of changes in the external environment. In addition, candidates were asked to evaluate the process of planning that they had undertaken including: the marketing planning process itself, the marketing audit, the segmentation-targeting-positioning approach adopted, and any implementation issues.

Guidelines were provided on word limits: 500 words for the executive summary (no marks awarded), up to a maximum of six sides of A4 for the audit (Task One); 3,000 words and a maximum of an additional three sides of A4 for other schedules and tables for the marketing plan (Task Two) and a maximum of 3,000 words for the evaluation report (Task Three). In addition, candidates could include a background to the organisation (two sides of A4) but no marks were awarded.

- **Comments on how the marking scheme was applied in terms of**
  - concept, application and evaluation
  - syllabus coverage
  - use of command words and the extent to which answers reflected what was required
  - the relative weighting of each part of a task and an indication of what aspects of the task required most care and attention
  - what differentiated the A, B, C, or D grades.

The overall breakdown of the mark scheme was: 30% concept, 30% application, 30% evaluation, and 10% time management and presentation.

Syllabus coverage was comprehensive, with all aspects of the marketing planning process covered. Specific aspects of the tasks required that each of these elements of assessment should be addressed.

Construction of a plan, with regard to the scenario, was the practical vehicle for assessing the role of marketing planning, the marketing audit process, segmentation-targeting-positioning strategies, and the implementation of plans in context. The two tasks, together with supplementary materials, were designed to assess candidates' knowledge of marketing planning process concepts, their practical application, and an evaluation of the decisions made relating to these.

Command words were explicitly utilised throughout the assignment brief and candidates should have gained a clear understanding of what was required from these. In particular, this related to the practical nature of Task Two where candidates were asked to *develop* a medium-term plan. Whereas, in the evaluation report, a more considered and judgemental approach was prompted through the use of command words such as *critically evaluate*, *explain and identify*.

The weightings of tasks are set out in the marking criteria in the assignment documentation. Examiners also consider and take into account the rationale for selecting the scenario in context and the key expected components of the plan in Task One together with the balance between knowledge, application and evaluation in the accompanying report in Tasks Two and Three.

The Professional Diploma Grade Descriptors for Level Six indicate what distinguishes an A, B, C, and D grade. The grade descriptors indicate what is expected from candidates within the different grade boundaries. In addition, the generic mark schemes indicate the minimum requirements under each assessment criteria. Generally, these can be summarised as follows:

**A grade:**

- all of the elements under each assessment criteria are comprehensively presented
- thorough understanding of relevant syllabus areas
- considerable evidence of wider reading from a range of sources
- consistently relies upon and refers to appended material
- thorough appreciation and understanding of key issues
- all aspects of the submission relate entirely to the assignment brief
- all aspects of the submission are detailed, complete, applied and evaluated
- all aspects of the submission adhere fully to the command prompts within the assessment criteria
- consistent and appropriate use of underlying concept and theory
- professionally researched, structured and presented throughout.

**B grade:**

- all of the elements under each assessment criteria are competently presented
- strong understanding of relevant syllabus areas
- some evidence of wider reading from a number of sources
- relies upon and refers to appended material
- sound appreciation and understanding of key issues
- most aspects of the submission relate to the assignment brief
- most aspects of the submission contain strong detail, application and evaluation
- most aspects of the submission adhere to the command prompts within the assessment criteria
- appropriate use of underlying concept and theory
- well researched, structured and presented throughout.

**C grade:**

- most of the elements under each assessment criteria are adequately presented
- reasonable understanding of relevant syllabus areas
- some but more limited evidence of wider reading
- some reliance and reference to appended material
- reasonable appreciation and understanding of key issues
- aspects of the submission have a tendency to be overly generic and formulaic
- aspects of the submission contain reasonable detail, application, and evaluation
- aspects of the submission adhere to the command prompts within the assessment criteria
- reasonable use of underlying concept and theory
- reasonably researched, structured and presented.

**D grade:**

- some elements under the assessment criteria are not fully presented
- limited/lacks understanding of relevant syllabus areas
- little/no evidence of wider reading
- little/no reliance or reference to appended material
- limited/lacks appreciation or understanding of key issues
- aspects of the submission are irrelevant, inaccurate or inconsistent
- aspects of the submission contain little/no detail, application, or evaluation
- aspects of the submission ignore command prompts within the assessment criteria
- limited/no reference to theory and/or incorrect application
- report lacks structure and focus, is under researched and weakly presented.

Overall, the grade descriptors provide a basis for understanding grade differences, but they are not definitive in this respect and due attention needs to be afforded to the specific tasks and the scenario presented. In particular, a focus on coherence and consistency in the plan and the process of its development is paramount to achieving success in this assignment.

- **A general overview of how the assessment (exam or assignment) was tackled, including a statistical analysis on the assessment as a whole**

The overall pass rate for the December 2011 paper was an overall pass rate of 63.31%.

The grade profile was as follows:



The overall pass rate for this March 2012 paper was 66.55%.

The grade profile was as follows:



- **Feedback on the academic quality of the cohort(s) that has just been examined and the quality of the teaching, as judged by the results**

Overall, the standard was strong, which reflects well on the guidance that has been provided by tutors, and the hard work that has been undertaken by candidates in preparation for submission of the completed assignments.

Further to this, a clear indication of the nature of the assignment and its tasks was provided through tutor support mechanisms before the syllabus launch and this was evident in the way that many candidates approached the work. There were also many references to the supporting materials and the CIM workbook, which displays clear evidence of effective research into relevant materials that enable the production of good quality submissions. Overall, the results with the revised format were encouraging, although there is still scope for standards to improve across the board, particularly with regard to producing more balanced responses to the tasks and greater integration and clarity in the assignment as a whole. As already mentioned, there were some strong, well-researched, and well executed plans that were soundly justified. However, the vast majority of passes were at C grade and tended to include a very basic audit with little discussion or evaluation of the presented material and a marketing plan that lacked coherence and a strong rationale. As a consequence, the plans had limited application, theoretical evaluation or justification. Similarly, the evaluation reports in Task Three were very superficial without any real depth of analysis.

In addition, some candidates provided weak responses in particular aspects of the assignment. For example, a lack of detail in the plan, weak evaluation of the process such as segmentation-targeting-positioning or competitor analysis and using a positioning map.

Formatting and presentation issues were evident in many submissions, although this may be the result of a lack of awareness of the expectations of the revised format in particular centres.

- **Commentary as to whether recommendations made in previous years have been properly followed up**

There were some marketing plans that made no reference to the outcomes of the audit, and this resulted in a lack of justification and direction. The key differences related clearly to the quality of the initial audit and also how this information was applied throughout the marketing plan. Some candidates wrote executive summaries but these were more of introductions or a repeat of the task, which was a waste of word count. Some of the international papers demonstrated that a suitable framework could be applied for the marketing plan but there were little or no links to the audit, therefore the plan had limited justification.

A recommendation to tutors would be to include a situation analysis. However, if there is a lot of relevant information, only include the key points and then reference the examiner to the specific content that contains all the detail. It is important to develop a commentary in the medium-term future facing marketing plan that builds on the audit of the current and historical situation. Compared to the previous diet there was an improvement in that more papers applied the theory.

- **Comments and examples of**

- strengths and good practice
- common mistakes when tackling this type of task.

### **General Comments**

Candidates appeared confident in their choice of tools for the audit. Most of the Task One submissions contained a PESTEL, a SWOT and Porter's 5 Forces model. It was noticeable that many candidates opted to use variations on the Kotler and Keller *Marketing Environment* model in their audit; whilst taking a comprehensive view this tended to occupy a large number of pages. Candidates would then be faced with the need to condense their font size or rely on a few pages crowded with diagrams of audit material. Either way they would lose marks for weak presentation.

There was a strong understanding of the marketing planning process in Task Two and the correct approach was taken by almost all candidates to the situation analysis and key issues arising from the audit, although there was a lack of detail in some cases. Candidates appreciated the difference between marketing strategy and marketing tactics within their plans and the majority of assignments contained a strong conclusion to Task Two, with suggestions for implementation, monitoring and control. However, not every plan contained a realistic and detailed budget to enable their plan to be put into action.

Few candidates managed to answer all parts of Task Three correctly. The final section containing recommendations for overcoming barriers to implementation of the plan seemed to be the most popular element, producing contextually imaginative answers.

### **General Strengths of Cohort**

Assignments were well presented, with some effective charts and illustrations in the audit section. Candidates followed the submission guidelines in the main and remembered to include the required declaration, but did not always position it on the front page. Most candidates used a recognised framework (SOSTAC or similar) for the marketing plan section of the assignment, which allowed them to show the progress of their thinking in developing the plan. There were some strong examples of well-contextualised and well-referenced audits (see also weaknesses below). The format and presentation was improved as was the content. The candidates were also more organised in providing a detailed audit and then a synopsis as part of the report.

### **General Weaknesses of Cohort**

Candidates seemed to have difficulty clearly identifying their chosen scenario. Some felt that their organisation was facing both opportunities and threats from external sources. In the audit, candidates would write a rationale for the marketing plan rather than a rationale for the chosen scenario. The rationale itself appeared in a variety of locations within the assignment and would often be very brief with a lack of justification. There was a tendency by some candidates to regard their six A4 size sheets of paper in the audit as mini “notice boards”, pasting up as many diagrams and tables as they could to illustrate marketing audit tools and models, many of which had little connection with the chosen scenario. The micro-font sizes used were also difficult to read. Candidates seemed to have been advised by some centres to regard the audit as an appendix to the assignment. Presentation issues were also evident in the plan. There were examples of candidates submitting volumes of text in tabulated form and discounting these words from their word-count limit, whilst no doubt hoping that the examiner would reward them for the subject matter contained in the tables and boxes. There was also a difficulty in describing the competitive strategy that had been developed for their organisation, often without any mention of competitors. Instead candidates preferred to describe the segmentation-targeting-positioning theory, used by their organisation as a specific marketing tactic.

### **Specific Task Issues**

#### **Task One**

The audits were generally detailed and of the correct font size, although a couple of centres appeared to have a format of specific models whether they were of relevance to the organisation/situation, particularly. Again, it is necessary to stress the importance in individuality in the choice of models for the audit and also whether a SWOT should appear in the situation analysis in the plan or in the audit as a summary, particularly with the proposed change in tasks to the assignment. Many international candidates will repeat models from the audit in the plan which is unnecessary as they can refer to detailed analysis in the audit; put

key points in the plan and use additional models, where appropriate, in the plan. Some candidates had spread their audit over the six pages (large font and lots of text instead of bullet points) and did not use tables so that there was minimal content. This format made it hard to pick out relevant points when the appendices had been referenced. There is still a lack of reference to the audit findings within the plan and the report, which affects the justification for any recommendations.

The rationale should have stated either an opportunity or threat as the basis for the justification for the plan. Some candidates did not make this clear or appeared to be identifying many threats but saw this as an opportunity, so there was some confusion over this. Sometimes it was only possible to identify the scenario from within the title of the plan. The rationales for the plans were generally concise and applied giving relevant information that had been extracted from the audit to demonstrate why the marketing plan was being compiled. However, there were a few assignments where there was confusion over Ansoff Strategies where some candidates confused the different strategies and opted for brand extension when diversification should have been chosen. These factors affected the validity of the plan from the start and also raised the question as to how 'loose' can the rationale be in relation to the task outcomes.

### **Task Two**

Most plans started with either an executive summary or a situation analysis that 'set the scene' and then some relevant and SMART objectives were given. A few papers had no SWOT and some discussed the importance of SMART objectives but their own objectives were not SMART. There was also a tendency to include potential unrealistic increases in, eg market share such as 50% increase in less than one year where there was no discussion to substantiate this. Some centres had obviously given examples of SMART objectives and weaker candidates had repeated these as they had a lot of objectives that did not link together. Some analyses of Porters made the market look highly unattractive; however, they were still keen to enter this but were unable to justify the risks involved or indicate critical success factors. Some plans broke the objectives down to financial and marketing with even stronger plans breaking further down to promotional objectives and completing separate communication mixes. It was disappointing that a couple of plans indicated the need for increasing brand awareness and even included an objective to achieve and measure this but did not include a profile strategy or any branding strategy in the plan.

Despite this, there were some excellent examples that were able to apply information from the audit to indicate a justified direction and plan for their chosen organisation. There was also, in the stronger papers, evidence of evaluation skills in terms of justification for segmentation-targeting-positioning, strategy and tactics. Gantt charts were detailed and there were some relevant control measures suggested.

### **Task Three**

This was generally the same as the previous assessment session where the answers to the task were more varied in content. Some papers had a host of academic referencing with less applied information, while some had more specific discussion on the organisation and how it completed the process of marketing planning with the odd reference. Some were repetitive in that information that had been placed in the plan was now repeated in this task in blocks of 'cut and paste'. However, there does seem to be a greater understanding of what is required.

There were the usual problems of interpreting the task on marketing planning. Some candidates talked generically about how planning can aid decision making, some discussed the plan structure only and some gave a brief overview on the importance of marketing orientation. Again concentration on the structure of the plan was addressed more by some centres as opposed to 'the planning process', as mentioned above, and application of theory was limited. Limited application was the main reason for lower marks and as most plans

were about re-launching it would have been relevant to relate the discussion to why the product needed to be re-launched and what had gone wrong the first time. A few of the stronger candidates addressed this really well.

Critical evaluation tended to be limited on the audit process with a lot of papers being more descriptive about each model used and repeating how to do an audit; therefore higher marks were not gained. In weaker candidates there was sometimes the same information repeated here from the plan and in some cases also the same tables/diagrams.

The main comment regarding justification of the plan using segmentation-targeting-positioning theory was that it was answered well with most papers, although some described the relevant theory but did not bring this into context with the rationale. Weaker papers struggled with detail in the segmentation-targeting-positioning strategy and therefore had limited comments to make within the report. In some papers there was very limited understanding of targeting and positioning and as such the plan and the report lost focus.

Finally, barriers to implementation were relevant and applied in most cases but some candidates took a generic list and did not offer any realistic solutions.

Bibliographies were varied in content and some papers had very limited references indicating limited reading sources.

- **Guidance about how candidates can avoid making similar errors and strategies for improving performance**

Read the brief carefully and identify what exactly is required and how it should be presented in the final submission.

This involves being aware of the essential aspects of the task, the different components of the plan and evaluation report that need to be produced, and how they all inter-relate. Consistency and coherence across the assignment are critical to success.

- Become familiar with the key components of the marketing planning process, plus the different sections expected to be included in a 'standard' marketing plan.
  - Understand the need to be able to critically evaluate the way that the plan has been developed in the given setting and what factors led to decisions that were made about strategy and tactics.
  - Be able to specify the practical difficulties with regard to implementation of different aspects of planning, such as undertaking the audit and executing the plan in reality 'on the ground'.
  - Get the balance of theory and practice right. Use theory where appropriate to structure your approach and justify where you have made decisions and expect to encounter difficulties in practice. However, there also needs to be a strong allied content that should be relevant to the scenario context and the organisation under consideration.
- **Suggestions of possible alternative approaches to tackling a task or parts of a task while making it clear that it is not the only way**

The tasks are clearly specified and there is a general expectation in terms of what should be included reflected in the mark scheme.

Most candidates were clear about what was required and how to produce a successful submission. Weaker candidates generally fell short, not on approach, but on preparation and understanding.

This is an open brief that provides an opportunity for all candidates to create and evaluate a plan in a particular context, so adopting a standardised planning approach is critical to success, knowing its limitations particularly in the setting of the organisation and its markets under consideration.

However, there is certainly scope for interpretation and emphasis in the context of the situation that the organisation faces. This issue relates to relevance of approach and content, and completeness of the task.

Although there is room for creativity in terms of the detail of application, the essential learning outcomes to be assessed are around understanding the marketing planning process and being able to critically evaluate its value and relevance to a particular organisational situation.

- **Recommendations for how performance can be improved in future assessments**

- Become familiar with the marketing planning process and its implementation in practice.
- Identify the stages of a marketing plan and the key components of each in detail.
- Learn to apply marketing planning process through consideration of case studies.
- Read relevant theory on marketing planning process and its implementation.
- Candidates need to think carefully before using bullet points. These are great for reducing word counts but do not get across the depth of analysis required at this level.

Specific areas of focus should include:

- the benefits of marketing planning
- undertaking the marketing audit
- applying the segmentation, targeting, positioning approach
- implementing marketing plans in practice – potential barriers and how to overcome them.

- **Clarification about any syllabus or assessment changes**

There are unlikely to be any syllabus and assessment changes in forthcoming assignments.

For the foreseeable future, the general structure of the assignment is likely to remain in the new format with the appendix used for additional material that carries no marks.

- **Possible future assessment themes**

The approach currently adopted is likely to be retained with scenario changes being the main variable factor in future assignments.

Candidates should be fully aware of a range of stimuli to enacting the marketing planning process which may come about because of internal and external forces, eg strategic decisions around new products and markets, re-launching and repositioning existing products, changes in the competitive environment, etc.