

Institute of Accountants and Bookkeepers

IAB Level 4 Diploma in Sales and Marketing

IAB Qualification Specification
(Amended March 2025)



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About IAB

Whilst the Institute of Accountants and Bookkeepers (IAB) was established in 1973, its history can be traced back to 1916.

The IAB was established in 1973 by the Council of the Institute of Administrative Accountants to maintain its historical connection to bookkeeping. Originally founded in 1916 as the Institute of Bookkeepers, it served as a professional body for bookkeepers - the modern equivalent of an in-house accountant working in industry and commerce.

The objective of the IAB was to offer basic qualifications in Bookkeeping at three levels - Preliminary, Intermediate and Final - with the final level being the equivalent to GCE A Level, a far cry from the breadth of qualifications now offered by the IAB. However, this principle is firmly at the heart of the organisation.

In September 2022 the International Association of Bookkeepers (IAB) changed its name to the Institute of Accountants and Bookkeepers (IAB). This change was made to reflect the diversity of our membership and breadth of our qualification offering.

In 2023, the IAB celebrated its 50th anniversary. The name change, particularly the inclusion of the word 'Institute,' reflected the organisation's rich heritage and ongoing commitment to pioneering efforts in education, anti-money laundering and legislative advocacy on behalf of the industry.

The IAB is recognised by HM Treasury to regulate our members for the purposes of the Money Laundering Regulations 2017 (Amended 2019 & 2022).

We represent our members at the following forums:

- HMRC Agent Support
- HMRC Compliance Reform
- HMRC Powers & Safeguarding
- HMRC Guidance Strategy Forum
- Anti-Money Laundering Supervisors Forum and Accountancy
- AML Supervisors' Group
- National Cross Sector SAR Forum and Advisory Reform
- Accountancy Intelligence Expert Working Group (ISEW/G)
- Companies House Accountancy Stakeholder

Recognition

We are regulated and approved by

- Ofqual (Office of the Qualifications and Examinations Regulation - England)
- CCEA (Northern Ireland).

We are a full member of Federation of Awarding Bodies (FAB).

IAB is an AML supervisory body, and we are regulated by OPBAS, a subsidiary of the

Financial Conduct Authority.

Why study with IAB

IAB has a 50-year+ history and an excellent global reputation. Our qualifications are designed to give you the best chance of achieving your full potential in your chosen career. Our suite of qualifications provides a realistic and broad opportunity for learners seeking career and professional development.

The IAB team includes established academics from UK universities and industry experts who are responsible for overseeing our entire qualification development and assessment processes to meet our high standards.

IAB offers a wide range of qualifications which are available at Levels 1 to 7 across the following subject areas:

- Business and Management
- Bookkeeping and Accounting
- Payroll

All our qualifications represent the latest in professional standards and provide opportunities for students to develop professional expertise. IAB has an outstanding history and an excellent global reputation. Our qualifications are designed to give you the best chance of achieving your full potential in your chosen career.

- Our Professionally designed qualifications give you the knowledge and skills you need to excel as a professional manager
- IAB is a not-for-profit organisation and we offer cost-effective high-quality qualifications
- IAB's flexible & fast track routes to degrees/master's degrees are a less expensive route to gaining a qualification.
- Our Ofqual qualifications are recognised by colleges, universities, employers and governments around the world.
- For over 50 years, learners around the world have been benefitting from IAB qualifications.

The qualifications have been designed to provide an ordered sequence of study that enables a student to progress from one academic level to another, i.e. from Level 1 Foundation Stage qualifications to UKHE recognised Level 4 (First Year undergraduate), Level 6 (Final Year degree graduate) and a Level 7 Diploma (i.e. Postgraduate Masters taught modules).

To develop our qualifications in business, we collaborated with a wide range of students, employers, higher education providers, colleges and subject experts to ensure that the new qualifications meet their needs and expectations. Our qualifications are designed to adapt and develop in line with the needs and demands of employers now and in the future.

Our suite of qualifications provides a rich mix of disciplines and skills development opportunities. Learners will gain insight into the functioning, objectives and processes of

organisations, appreciating their diversity and the influences and impact of external forces on them. The fast-changing and complex business environment and different organisations' ability to stay resilient and respond positively to change and opportunities will be explored.

- We are approved and regulated by Ofqual (Office of the Qualifications and Examinations Regulation)
- Our graduates are accepted into corresponding degree and master's top-up programmes with advanced standing
- It offers an affordable pathway to a UK degree and masters (top-up) programme than the universities
- Flexible study option through approved delivery centres globally & online
- The curriculum has a combination of academic and professional elements
- Learners will gain the professional skills expected by global employers
- Option to become a professional member upon completion of certain level of our qualifications
- Increased potential for international career opportunities.
- Graduates will receive international recognition by application of designated letters.
- Increased employability and earnings potential.
- Become part of a worldwide community of professionals.
- IAB is leading the way in sustainability.
- No barriers to entry for qualifications.

About the qualification

This qualification provides a flexible route for further study for learners who have already gained related qualifications at a lower level, as well as those who have qualifications in other relevant areas and/or prior Sales and Marketing experience in the workplace.

This qualification has been designed to provide learners with the awareness and skills required in the modern developing business market and environmental needs. It focuses on a wide range of topics within each module of study to support internal and external business factors affecting environment, variables, planning, IT, customer needs and strategy as some examples. These are valuable developing skills and knowledge to have and can be used to open opportunities to a wide variety of employers.

Availability and Accessibility

This qualification is available to learners who are registered at a recognised IAB centre which is based in England, Wales or internationally, outside of the United Kingdom.

IAB policy regarding access to our qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all those wishing to access the qualifications

Entry Requirements

This qualification is designed for those who are typically aged 18 years of age. For learners recently in education or training the profile is likely to be:

- A GCE Advanced level profile with achievement in 2 or more subjects supported by 5 or more GCSEs, ideally including maths and English
- Other related Advanced level qualifications
- An Access to Higher Education Certificate delivered by an approved Further or Higher Education Institute
- Other equivalent international qualifications

All learners must have an appropriate level of English and may also have relevant work experience or be employed in the Hotel and Hospitality sector or other related sectors.

Mature learners may present a more varied profile of achievement that is likely to include work experience (paid or voluntary), part-time or full-time employment, with levels of responsibility, participation and/or achievement of relevant professional qualifications. These may be used for recognition of prior learning (RPL).

Centres offering this qualification must recruit learners with integrity and carry out robust initial assessment to ensure that learners undertaking this qualification, have the necessary background knowledge, understanding and skills to undertake the learning and assessment at Level 4.

Progression and University Pathways

To facilitate university progression to University top-up degrees, IAB is recognised by Ofqual as an Awarding Body. Ofqual is the regulator of qualifications, examinations and assessments in England and vocational qualifications in Northern Ireland.

Learners who complete all ten Units at Level 4 will be awarded an IAB Level 4 Diploma in Sales & Marketing with a qualification value of 120 credits.

Subject to status and completion of all Units and achievement (Pass) of all online summative assessments at Level 4, will allow learners to progress to the qualifications at Level 5.

Qualification Details

IAB Level 4 Diploma in Sales and Marketing

This qualification is approved by Ofqual and meets the Ofqual General Conditions for inclusion on the Register of Regulated Qualifications. The Qualification Number (QN) is: 610/3126/4.

The Units are written at Ofqual RQF level 4 and conform to Ofqual regulations. The RQF is a framework which awards credit for qualifications. Each Unit within a qualification has a credit value and a level. The credit value specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of a Unit. The level is an indication of relative demand, complexity and depth of achievement and autonomy.

For all regulated qualifications, we specify the total number of hours that learners are expected to undertake to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, we identify the number of Guided Learning Hours (GLH) that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners. For example lectures, tutorials, online instruction and supervised study.

As well as guided learning, there may be other required learning that is directed by tutors or assessors. This includes, for example, private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

TQT and guided learning hours are assigned after consultation with users of the qualifications.

Qualification Structure

The **IAB Level 4 Diploma in Sales and Marketing** is a 120-credit qualification consisting of ten mandatory units.

Rules of combination

In order to obtain the Diploma learners must achieve 120 credits by completing all ten mandatory units.

Qualification time and Guided Learning hours

The Diploma has a recommended TQT value of 1200 hours and a GLH of a minimum of 600 hours.

The learning hours for this qualification are as follows:

Guided (GLH)	Learning Hours	Total Qualification Time (TQT)
600 hours		1200 hours

Unit Title	Level	Credit	GLH
Mandatory units			
Business Environment	4	12	60
Marketing Mix	4	12	60
Customer Service	4	12	60
Marketing and Sales Functions	4	12	60
Managing Marketing	4	12	60
Marketing Strategy	4	12	60
Selling	4	12	60
E-Marketing Communications	4	12	60
Customers and their Needs	4	12	60
Information Technology in Business	4	12	60

Qualification Objectives

Rationale

This qualification will provide learners with a comprehensive understanding of how internal and external influences within a business can impact on an organisation. Principles of market mix and influence and how these contribute to development and planning.

The qualification will give learners a knowledge and understanding of some of the types of

customer needs and customer interaction with the organisation which provides the importance of effective customer interaction providing effective and efficient customer service. An in-depth knowledge of marketing strategy and objectives and effective management sales strategies.

This document provides key information on the Level 4 Diploma in Sales and Marketing.

Knowledge, skills and understanding requirements

Progression

IAB qualifications are designed to allow students to pursue different routes as outlined below.

Enter a chosen field of work, pursue a promotion, or change their field of work

The IAB Level 4 Diploma in Sales and Marketing supports learners who want to expand their range of knowledge and take on additional responsibility in the workplace.

Using appropriate internal processes, centres must ensure they choose the most appropriate qualification level for their students' needs.

Progress to further study, such as the next level or externally with a professional body or education provider

Holders of the IAB Level 4 Diploma in Sales and Marketing qualification can use the qualification as the basis for progressing to a qualification at a higher level, thereby expanding their range of knowledge and skills.

Staffing and physical resource requirements for centres

The IAB, in line with regulatory requirements, has a Centre Agreement in place which covers the two-way obligations between the IAB as the Awarding Body and each Centre. A key section of this agreement is to ensure a professional approach to the delivery of teaching, learning and assessment, leading to be best learner experience.

Each Centre engaged with the IAB is required to ensure viable levels of staffing, managerial and financial resources are in place to enable it effectively and efficiently deliver the Qualifications as required by the Awarding Organisation.

IAB Recognition of Prior Learning (RPL)

There will be occasions where learners wish to claim recognition of prior learning that has not been formally assessed and accredited. IAB has provided detailed guidance on RPL which is available for centres on the IAB website. Centres may also contact IAB directly to obtain further clarification or discuss the requirements for RPL.

Modes of study

The Certificate may be studied Full Time or Part Time, depending on the suitability of the timetable organised by each study centre.

Guidance on Assessment and Grading Assessment

The assessment of this Level 4 qualification is completed through the submission of internally assessed learner work. To achieve a pass for a unit, a learner must have successfully achieved the learning outcomes at the pass standard set by the assessment criteria for that unit.

IAB will provide a sample assignment for each unit which can be used as the assessment for the unit. An assessor should record their judgements on the IAB template, stating whether the learner has achieved a pass and providing evidence for the judgements. The internal verifier can also use the IAB IV template but the feedback to the assessor must show whether the assessor has made valid judgements for all the learner work. Assessment judgements always require care to ensure that they are reliable and that there is sufficient and specific feedback to the learner to show whether he or she has demonstrated achievement of the LO at the specified standard.

Assessment of this specification will be in English only. Assessment materials will be published in English only and all work submitted for examination must be in English only.

Recording Assessment Judgements

Assessors are required to record assessment judgements for each student by unit. IAB has provided a template for centres to use to record their judgements and this form should be used. The form enables the centre to record any adjustments due to special considerations or reasonable adjustments. Any adjustments following appeals should also be recorded. These records must be retained as they will be checked at external verification visits. All learner work must be retained for a minimum of 4 years after certification has taken place.

Putting an Assessment Strategy in Place

You will need to demonstrate to your External Verifier that you have a clear assessment strategy supported by robust quality assurance in order to meet the IAB requirements for registering learners for a qualification. In devising your assessment strategy, you will need to ensure that:

- Centre devised assignments are clearly mapped to the unit learning outcomes and assessment criteria they have been designed to meet.
- the command verbs used in the assignment are appropriate for the level of the qualification, e.g. analyse, evaluate, synthesise.
- the assignment gives the learner sufficient opportunity to meet the assessment criteria at the right level, through the work they are asked to complete (The RQF level descriptors will be helpful to you in determining the level of content of the assessment).
- Students are well-briefed on the requirements of the unit and what they have to do to meet them.
- Assessors are well trained and familiar with the content of the unit/s they are assessing.
- There is an internal verification process in place to ensure consistency and standardisation of assessment across the qualification.
- Assessment decisions are clearly explained and justified through the provision of

feedback to the learner.

- work submitted can be authenticated as the learner's own work and that there is clear guidance and implementation of the centres Malpractice Policy.
- there is an assessment plan in place identifying dates for summative assessment of each unit and indicating when external verification will be needed.
- Sufficient time is included in the assessment planning to allow the learners time for any necessary remedial work that may be needed prior to certification.
- Centres will be required to undertake training, internal verification and standardisation activities as agreed with IAB.

Grading system

The grading algorithms and overall grade thresholds published in any IAB specification may be subject to change where this is necessary to maintain standards.

This qualification involves assessment using judgements against the same 'Pass', Learning Outcomes and Assessment Criteria over time to make a decision about whether a learner has met the required standard. Our grading system is extremely simple and we do not currently envisage the need to change this. However, should a change become necessary, the change would be published in an updated version of the specification with a clearly revised version number and a new 'valid from' date on the front cover. We will write to all centres in good time to inform them of this change so that plans for any changes can be made to your programme delivery, internal assessment and quality assurance arrangements.

The IAB grading system where a qualification result can be either Pass or Fail is as currently follows and we plan to maintain this system for the foreseeable future:

- Learner meets all Learning Outcomes at Pass standards stated in the assessment criteria in a unit > Learner gains a Pass for the unit
- Learner does not meet all Learning Outcomes at Pass standards stated in the assessment in a unit > Learner gains a Fail for the unit
- Learner achieves a Pass for all the required units in the rules of combination > learner achieves a Pass for the qualification
- Learner does not achieve a Pass for all the required units in the rules of combination > learner achieves a Fail for the qualification but may receive unit credit certification for those units achieving a Pass.

Qualification Grading Structure

Determining the Overall Qualification Grade

Each unit is graded pass or fail. As well as receiving a grade for each individual unit learners will receive an overall grade for the qualification. Each unit is equally weighted.

To achieve a Pass grade for the qualification the learner must achieve a Pass for all the required units in the rules of combination.

Marking and moderation

Marking of assessments is usually undertaken by the module tutor. On occasion another marker may conduct the marking process.

Moderation is undertaken by a separate independent assessor, and is a process separate from

the marking of assessments. It acts as a filter, which ensures that an assessment outcome is fair, valid and reliable, and that assessment criteria have been applied consistently.

Moderation will take place before External Examiners review the operation of the marking and internal moderation process.

Quality Assurance of Centres

Centres delivering IAB qualifications must be committed to ensuring the quality of teaching and learning so that the learner experience is assured. Quality assurance will include a range of processes as determined by the centre and this could include, IAB learner feedback, lesson observation, analysis of qualitative and quantitative data etc. There must also be effective standardisation of assessors and verification of assessor decisions. IAB will rigorously monitor the application of quality assurance processes in centres.

IAB's quality assurance processes will include:

- Centre approval for those centres which are not already recognised to deliver IAB RQF qualifications
- Monitoring visits to ensure the centre continues to work to the required standards
- External verification of learner work

Centres will be required to undertake training, internal verification and standardisation activities as agreed with IAB. Details of IAB's quality assurance processes are provided in the IAB Assessment Delivery Process and Centre Assessment Standards Scrutiny (CASS) Strategy.

Access arrangements, Reasonable Adjustments and Special Considerations

The IAB, in line with regulatory requirements has a number of policies in place to ensure we support learners who may have specific needs, for example a form of disability.

As an awarding organisation, the IAB has a duty not to discriminate against individuals in relation to conferring qualifications in respect of the protected characteristics set out in the Equality Act 2010 (an Equality, Diversity and Inclusion Policy and Procedures are in place). The IAB will take steps when developing specifications, identifying the assessment criteria, and drafting assessment content to ensure that the impact on individuals with differing protected characteristics is minimised.

Access arrangements

Access arrangements are agreed before an assessment. They allow students with special educational needs, disabilities or temporary injuries to:

- Access the assessment
- Show what they know and can do without changing the demands of the assessment

The intention behind an access arrangement is to meet the particular needs of an individual student with a disability without affecting the integrity of the assessment. Access arrangements are the principal way in which awarding bodies comply with the duty under the Equality Act

2010 to make 'reasonable adjustments'.

Access arrangements should always be processed at the start of the course. Students will then know what is available and have the access arrangement(s) in place for assessment.

Reasonable Adjustments

The duty for the IAB to make a reasonable adjustment will apply where assessment arrangements would put a learner who has a disability or learning need at a substantial disadvantage in comparison with a learner who does not have a disability or learning need. In such circumstances, the IAB is required to take steps to mitigate that disadvantage.

Whether an adjustment will be considered reasonable will depend on several factors, which will include:

- the needs of the student with the disability
- the effectiveness of the adjustment
- the cost of the adjustment
- the impact of the adjustment on the student with the disability and other students

An adjustment will not be approved if it involves unreasonable costs to the awarding organisation, time limits or affects the security or integrity of the assessment. This is because the adjustment is not 'reasonable.'

Where a learner has been awarded a Reasonable Adjustment or Special Consideration this must be recorded on the assessment sheet and the learner record. External Verifiers will take account of this information at the external verification of learner work. Further details on Reasonable Adjustments and Special Considerations are provided in the policy document, which can be found on our website. Please contact IAB if you uncertain about adjustments for certain learners.

Special consideration

Special consideration is a post-assessment adjustment to a student's mark or grade to reflect temporary injury, illness or other indisposition at the time of the examination/ assessment, which has had, or is likely to have had, a material effect on a candidate's ability to take an assessment or demonstrate their level of attainment in an assessment.

Equality Act 2010 and IAB Equality Policy

Equality and fairness are central to our work. Our Equality Policy requires all students to have equal opportunity to access our qualifications and assessments, and our qualifications to be awarded in a way that is fair to every student.

We are committed to making sure that:

- Students with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to students who do not share that characteristic.
- All students achieve the recognition they deserve for undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Appeals and enquiry of results

The IAB has an Enquiries and Appeals Policy in place which describes the process and procedures for enquiries about results and appeals against assessment decisions and Reasonable Adjustments and Special Considerations permissions.

Learners or centres may wish to submit an enquiry about results – for example, if results vary considerably from those expected. A clerical check of results may conclude the enquiry, or a learner/centre may decide to progress to appeal. An appeal against an assessment decision may be submitted without having already submitted an enquiry about results.

Where an associated investigation leads to the discovery of a failure in its assessment process, the IAB will take all reasonable steps to:

- Identify any other learner who has been affected by the failure
- Take corrective action or, where no corrective action can be taken, mitigate as far as possible the effect of the failure
- Ensure that such a failure cannot reoccur

Results and certification

Results and certification will be provided within a 3-month timescale. This period is allocated to enable marking and moderation to take place.

Malpractice

Candidate malpractice

Candidate malpractice refers to any act by a candidate that compromises or seeks to compromise the process of assessment or which undermines the integrity of the qualifications or the validity of results/certificates.

Candidate malpractice in examinations must be reported to the IAB awarding team by email ao@iab.org.uk clearly identifying the title or posted to the registered office 110 Bishopsgate, London, EC2N 4AY. Please provide as much information and supporting documentation as possible. Note that the final decision regarding appropriate sanctions lies with IAB.

Failure to report malpractice constitutes staff or centre malpractice.

Staff/centre malpractice

Staff and centre malpractice includes both deliberate malpractice and maladministration of our qualifications. As with candidate malpractice, staff and centre malpractice is any act that compromises or seeks to compromise the process of assessment, or which undermines the integrity of the qualifications or the validity of results/certificates.

All cases of suspected staff malpractice and maladministration must be reported immediately, before any investigation is undertaken by the centre, to IAB awarding team by email ao@iab.org.uk clearly marked malpractice or posted to the registered office 110 Bishopsgate, London, EC2N 4AY. Please provide as much information and supporting documentation as possible. Note that the final decision regarding appropriate sanctions lies with IAB.

Centres must have a robust Malpractice Policy in place, with a clear procedure for implementation. Centres must ensure that any work submitted for verification can be authenticated as the learner's own. Any instance of plagiarism detected by the External Verifier during sampling, will be investigated and could lead to sanctions against the centre.

Centres should refer to the Assessment Delivery Policy and the IAB Malpractice and Maladministration Policy on the IAB website.

Qualification Specification

1	Qualification Title	IAB Level 4 Diploma in Sales and Marketing
2	Qualification code	610/3126/4
3	Level	4
4	Pre-requisite Module/s	Not applicable
5	Outline	This qualification will provide learners with a comprehensive understanding of how internal and external influences within a business can impact on an organisation. Principles of market mix and influence and how these contribute to development and planning. Learners will develop a sound understanding of some of the types of customer needs and customer interaction within the organisation which provides the importance of effective customer interaction providing effective and efficient customer service. An in-depth knowledge of marketing strategy and objectives and effective management sales strategies.
6	Module structure	The course consists of the following modules: 1. Business Environment 2. Marketing Mix 3. Customer Service 4. Marketing and Sales Functions 5. Managing Marketing 6. Marketing Strategy 7. Selling 8. E-Marketing Communications 9. Customers and their Needs 10. Information Technology in Business

Unit Specifications

Unit Title	1: Business Environment
Unit Aims	This unit aims to develop knowledge and understanding of the business environment and its impact on organisations. This includes factors that shape the internal environment and other external influences.
Unit Level	4
Guided Learning Hours	60
Credit Value	12
Unit Grading Structure	Pass
Assessment Guidance	Learners will need to demonstrate achievement of each Learning Outcome at the standards provided by the related Assessment Criteria. There is a requirement for learners to use actual examples from businesses to illustrate the points which are made and to support the demonstration of understanding.
Learning Outcomes: The learner will:	Assessment Criteria: The learner can:
1. Understand the impact of the macro- environment on an organisation.	1.1 Analyse the impact of a chosen organisation's macro-environment on the organisation, using an appropriate framework.
2. Understand the impact of the micro- environment on an organisation	2.1 Analyse the micro-environment of an organisation, using appropriate models and business case studies.
3. Understand the factors that shape the internal environment of an organisation	3.1 Analyse the importance of an organisation's mission, structure and culture in shaping an organisation's operations. 3.2 Explain the factors which shape an organisation's internal environment. 3.3 Explain the impact of an organisation's external environment on the internal environment.

4. Understand different approaches used by organisations for managing the impact of changes in the external environment.	4.1 Evaluate approaches available to organisations to manage internal change due to shifts in the external environment. 4.2 Assess the suitability of each approach in dealing with specific change scenarios.
5. Understand the internal strategies used by organisations to respond to globalisation.	5.1 Explain different elements of globalisation and their impact on organisations 5.2 Assess different organisations' responses to globalisation.

Indicative Content

1. Understand the impact of the macro-environment on an organisation.

- An Analysis Framework for the Macro-environment: PESTLE
 - Political
 - Economic
 - Socio-Cultural
 - Technological
 - Legal
 - Environmental
- Influence over the Macro-environment
- Socio-cultural Influences - impact of Social Media
- Pressure Groups and Consumer Groups

2. Understand the impact of the micro-environment on an organisation.

- Porter's Five Forces Model
 - Buyers/Customers
 - Suppliers
 - New Entrants
 - Substitutes
- Industry Rivalry
- Applying Porter's Five Forces Analysis
- Validity of Porter's Five Forces in Current Environment

3. Understand the factors that shape the internal environment of an organisation.

- Organisational mission
- Organisational structure
- Organisation culture
- Leadership style and management power
- Skills and Knowledge
- Core Competencies
- Matching the Internal Environment with the External

4. Understand different approaches used by organisations for managing the impact of changes in the external environment.
 - Change
 - Innovation
 - Continuous change
 - Learning organisation
 - Business transformation
 - Mergers and acquisitions
5. Understand the internal strategies used by organisations to respond to globalisation.
 - Globalisation elements
 - Internal responses to globalisation
 - Global organisational structure
 - Global sourcing, production and distribution
 - Global marketing

Unit Title	2: Marketing Mix
Unit Aims	This unit aims to develop knowledge and understanding of the marketing mix and the associated processes which can be used by organisations. Learners will be able to apply their own ideas to the development of the marketing mix for specific organisations.
Unit Level	4
Guided Learning Hours	60
Credit Value	12
Unit Grading Structure	Pass
Assessment Guidance	Learners will need to demonstrate achievement of each Learning Outcome at the standards provided by the related Assessment Criteria. There is a requirement for learners to use actual examples from businesses to illustrate the points which are made and to support the demonstration of understanding. LOs which start with 'Be able to' require the learner to do what is stated.
Learning Outcomes – The learner will:	Assessment Criteria – The learner can:
1. Understand the role of market segmentation and the marketing mix in marketing decision making	1.1 Explain the term market segmentation and how this works in practice 1.2 Explain the term market positioning and how this works in practice 1.3 Evaluate the role of the marketing mix in decision making.
2. Be able to use segmentation in the development of an effective marketing mix.	2.1 Perform segmentation of consumer markets by using different segmentation and profiling methods. 2.2 Use segmentation to develop a marketing mix for a product or service.
3. Understand the role of the marketing mix parameters in marketing products or services	3.1 Discuss the role of the eight marketing mix parameters in marketing products or services 3.2 Explain how branding and customer value concepts are affected by a balanced marketing mix.
4. Understand the application of the marketing mix in practice, both in private and non-profit sectors.	4.1 Evaluate the application of a customer centric approach to the marketing mix in a certain scenario in the private sector. 4.2 Evaluate the use of the extended marketing mix in a chosen organisation in the non-profit sector.

Indicative Content

1. Understand the role of market segmentation and the marketing mix in marketing decision making.
 - Market management
 - Understanding the marketplace
 - Carrying out market segmentation
 - Portfolio analysis
 - Developing market segment strategies and plans
 - Managing the market segment
 - Portfolio analysis in practice
 - Market positioning strategies
 - Role of the marketing mix
2. Be able to use segmentation in the development of an effective marketing mix.
 - Types of markets
 - Segmenting consumer markets
 - Customer Profile Segmentation
 - Psychological Profiling
 - Behavioural Profiling
 - Segmenting business markets
 - Effectiveness of marketing mix in market segmentation
 - Buyer behaviour and buying decision making
3. Understand the role of the marketing mix parameters in marketing products or services.
 - Extended Marketing mix parameters
 - Product
 - Price
 - Promotion
 - Place
 - People
 - Process
 - Physical evidence the marketing communication process
 - Delivering customer value
 - Branding
4. Understand the application of the marketing mix in practice, both in private and non-profit sectors.
 - Customer centric view of the marketing mix
 - Customer Solution
 - Customer Cost
 - Convenience
 - Communication

Unit Title	3: Customer Service
Unit Aims	This unit aims to develop knowledge and understanding of the nature of customers and the importance of effective customer service.
Unit Level	4
Guided Learning Hours	60
Credit Value	12
Unit Grading Structure	Pass
Assessment Guidance	Learners will need to demonstrate achievement of each Learning Outcome at the standards provided by the related Assessment Criteria. There is a requirement for learners to use actual examples from businesses to illustrate the points which are made and to support the demonstration of understanding.
Learning Outcomes – The learner will:	Assessment Criteria – The learner can:
1. Understand the importance of focusing on customer needs and wants when marketing and selling products and services.	1.1 Differentiate between customer types and their needs. 1.2 Analyse the importance of focusing on customer needs and wants when marketing and selling products and services
2. Understand how to create market segments to categorise customers who have specific needs and wants.	2.1 Analyse customer behaviour 2.2 Analyse the customer decision-making process. 2.3 Explain how to create market segments to categorise customers who have specific needs and wants 2.4 Explain concepts associated with buyer readiness and loyalty.
3. Know strategies that will create delighted customers.	3.1 Explain the concept of delighted customers. 3.2 Describe the strategic use of the different elements of the extended marketing mix to create delighted customers 3.3 Discuss strategies for effective customer service. 3.4 Propose measurable criteria for assessing marketing effectiveness in terms of creating delighted customers

4. Understand how the analysis of the macro- environment can influence the planning of a customer service strategy	4.1 Analyse ways in which organisations can adjust to external influences by applying macro- environment analytical methods. 4.2 Analyse ways in which the analysis of the macro- environment can influence the planning of a strategy so that an organisation continues to create customer delight.
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Indicative Content

1. Understand the importance of focusing on customer needs and wants when marketing and selling products and services.
 - Marketing and sales
 - Exchange transactions
 - The relationship with customers
 - Some myths about customers and marketing
 - Types of customer
 - Internal and external customers
 - Definition of needs and wants
2. Understand how to create market segments to categorise customers who have specific needs and wants.
 - Customer behaviour
 - The customer decision-making process
 - Factors that may affect the purchasing decision
 - Features, advantages and benefits
 - Buying situations
 - Customers and segmentation
 - The importance of accurate segmentation
 - Geographical segmentation
 - Demographics
 - Psychographic segmenting
 - Behaviour segmentation
 - Buyer readiness and loyalty
3. Know strategies that will create delighted customers.
 - The concept of delighted customers
 - The 7Ps of marketing
 - Product and Customers
 - Price and customers
 - Promotion
 - Place
 - People, Processes and Physical evidence
 - The customer service concept

- Customer service in a service industry
 - Effective e-marketing
 - Measuring the effectiveness of marketing
 - Measuring the reach of an advertising campaign
 - Website metrics
 - Customers and brand recognition
 - Predicting what will create delight
4. Understand how the analysis of the macro-environment can influence the planning of a customer service strategy.
- PESTLE influences
 - PESTLE factors
 - Planning strategies

Unit Title	4: Marketing and Sales Functions
Unit Aims	This unit aims to develop knowledge and understanding of the marketing environment and the impact on organisations. Learners will also understand the interaction between Marketing and Sales.
Unit Level	4
Guided Learning Hours	60
Credit Value	12
Unit Grading Structure	Pass
Assessment Guidance	Learners will need to demonstrate achievement of each Learning Outcome at the standards provided by the related Assessment Criteria. There is a requirement for learners to use actual examples from businesses to illustrate the points which are made and to support the demonstration of understanding.
Learning Outcomes – The learner will:	Assessment Criteria – The learner can:
1. Understand different types of customers.	1.1 Differentiate between consumer and business customers 1.2 Differentiate between internal and external customers
2. Understand the marketing environment	2.1 Evaluate models which can be used to assess the marketing environment 2.2 Analyse the internal and external environments for a chosen business.
3. Understand marketing strategies used within organisations.	3.1 Explain how to perform market segmentation and targeting for specific business scenarios. 3.2 Explain how market positioning works 3.3 Explain how to perform portfolio analysis. 3.4 Analyse growth strategies used by chosen organisations.
4. Understand the critical relationship between sales and marketing	4.1 Analyse how a marketing plan is likely to affect sales 4.2 Discuss factors that must be considered in order to achieve marketing and sales objectives. 4.3 Explain the impact of marketing activities for pre- sales, sales and post-sales phases. 4.4 Analyse ways in which the sales team can provide useful input to marketing plans 4.5 Explain the importance of co-

	ordination between the Sales team and the Marketing team to achieve business objectives
5. Understand the function of the sales team.	5.1 Evaluate the importance of the sales function to an organisation. 5.2 Analyse the functions of territory sales and key account sales 5.3 Analyse the importance of sales plans, objectives and forecasting figures for the other functions within an organisation

Indicative Content

1. Understand different types of customers.
 - Markets
 - Consumer vs. Business Customers
 - Internal vs External Customers
 - Market segments
 - Public and Charity Sectors
2. Understand the marketing environment.
 - Marketing environment
 - Macro environment
 - Microenvironment
 - Internal environment
 - Matching the external and internal environments
3. Understand marketing strategies used within organisations.
 - Market segmentation and targeting
 - Market Positioning
 - Market segmentation
 - Portfolio analysis
 - Market Growth Strategies
4. Understand the critical relationship between sales and marketing.
 - Marketing plan

- Market management
 - Sales vs. marketing
 - Sales process and the sales funnel
 - Sales process detailed
 - Pre-sale phase
 - Decision making unit
 - Consultative selling
 - Sales phase
 - Post-sales phase
5. Understand the function of the sales team.
- Sales Planning and Goal-orientation
 - Alignment with other plans
 - Territory Planning
 - Key Account Management

Unit Title	5: Managing Marketing
Unit Aims	This unit aims to develop knowledge and understanding of marketing as a key management tool. This includes the marketing planning process and the role of internal as well as external marketing. Using this knowledge, learners will be able to understand the value of marketing activities to an organisation.
Unit Level	4
Guided Learning Hours	60
Credit Value	12
Unit Grading Structure	Pass
Assessment Guidance	Learners will need to demonstrate achievement of each Learning Outcome at the standards provided by the related Assessment Criteria. There is a requirement for learners to use actual examples from businesses to illustrate the points which are made and to support the demonstration of understanding. LOs which start with 'Be able to' require the learner to do what is stated.
Learning Outcomes – The learner will:	Assessment Criteria – The learner can:
1. Understand the importance of marketing across different sectors.	1.1 Analyse the concept of marketing 1.2 Analyse the existence of markets in different sectors. 1.3 Explain how marketing practices must adapt to the requirements of different sectors.
2. Understand the range of methods and tools used for market segmentation, targeting and market positioning.	2.1 Evaluate a range of methods and tools used for market segmentation, targeting and market positioning. 2.2 Explain the needs of each segment. 2.3 Provide detailed plans for market positioning and targeting for a range of scenarios and case studies.
3. Understand how the marketing mix could be configured to achieve market positioning strategies	3.1 Analyse ways of configuring the marketing mix 3.2 Explain how the marketing mix could be configured to achieve chosen market positioning strategies 3.2 Analyse the benefits of using portfolio analysis methods for market positioning strategies

4. Understand the marketing planning process and the role of internal marketing in achieving successful marketing outcomes.	4.1 Analyse the marketing planning process 4.2 Discuss ways in which organisations can align their internal operations to achieve successful marketing outcomes
5 Understand the use of electronic systems for marketing	5.1 Explain the benefits of e-marketing for organisations. 5.2 Evaluate the design of a business website 5.3 Explain the use of technology for successful Customer Relationship Management.

Indicative Content

1. Understand the importance of marketing across different sectors.
 - Defining marketing
 - Defining markets
 - Public and Charity Sectors
 - Marketing strategies in different sectors
 - Social marketing
 - Political marketing
2. Understand the range of methods and tools used for market segmentation, targeting and market positioning.
 - The marketing environment
 - Macro environment
 - Micro environment
 - Market segmentation, targeting and positioning
 - Target marketing
 - o Benefits of target marketing
 - The customer decision-making process
 - The diffusion of innovations
 - Customer influences
 - Customer satisfaction
 - Marketing research
3. Understand how the marketing mix could be configured to achieve market positioning strategies.
 - Market Positioning Strategies
 - The Marketing Mix
 - Portfolio Analysis

4. Understand the marketing planning process and the role of internal marketing in achieving successful marketing outcomes.
 - Internal Marketing
 - Making marketing happen
 - Market research techniques
 - The marketing planning process
 - The marketing audit
5. Understand the use of electronic systems for marketing.
 - E-marketing
 - Website design
 - Customer Relationship Management

Unit Title	6: Marketing Strategy
Unit Aims	This unit aims to develop knowledge and understanding of how marketing strategy is developed within organisations. This includes identifying opportunities for developing marketing objectives. Using this knowledge, learners will be able to use marketing information to develop appropriate strategic options.
Unit Level	4
Guided Learning Hours	60
Credit Value	12
Unit Grading Structure	Pass
Assessment Guidance	Learners will need to demonstrate achievement of each Learning Outcome at the standards provided by the related Assessment Criteria. There is a requirement for learners to use actual examples from businesses to illustrate the points which are made and to support the demonstration of understanding. LOs which start with 'Be able to' require the learner to do what is stated.
Learning Outcomes – The learner will:	Assessment Criteria – The learner can:
1. Be able to assess the market environment to inform a marketing strategy	1.1 Perform a PESTLE analysis to assess the macro environment for a marketing strategy. 1.2 Discuss how the internal and external environments affect a marketing strategy. 1.3 Perform a SWOT analysis of the microenvironment of an organisation, in order to inform a marketing strategy.
2. Be able to analyse an organisation's portfolio to inform its marketing strategy.	2.1 Conduct portfolio analysis for a chosen organisation 2.2 Analyse the impact of the portfolio analysis on an organisation's marketing strategy
3. Understand market entry strategies.	3.1 Explain how to decide on the most appropriate market entry mode based on assessing entry objectives. 3.2 Analyse market entry strategies and their implementation.

4. Understand how the marketing mix can be configured to achieve market strategy objectives.

4.1 Explain how to configure the marketing mix to prepare a marketing plan which aims to achieve market strategy objectives.

Indicative Content

1. Be able to assess the market environment to inform a marketing strategy.
 - Markets
 - Market segmentation
 - Products
2. Be able to analyse an organisation's portfolio to inform its marketing strategy.
 - The marketing environment
 - Internal environment
 - SWOT
 - PESTLE
3. Understand market entry strategies.
 - Segmentation and Targeting
 - Market Positioning
 - Portfolio Analysis
 - Growth Strategies
 - Entry Objectives
 - Market Entry Strategies
4. Understand how the marketing mix can be configured to achieve market strategy objectives.
 - Marketing mix
 - Marketing plan
 - Market management

Unit Title	7: Selling
Unit Aims	This unit aims to develop knowledge and understanding of selling. This includes the process and characteristics of sales and sales management.
Unit Level	4
Guided Learning Hours	60
Credit Value	12
Unit Grading Structure	Pass
Assessment Guidance	Learners will need to demonstrate achievement of each Learning Outcome at the standards provided by the related Assessment Criteria. There is a requirement for learners to use actual examples from businesses to illustrate the points which are made and to support the demonstration of understanding. LOs which start with 'Be able to' require the learner to do what is stated.
Learning Outcomes – The learner will:	Assessment Criteria – The learner can:
1. Understand sales practices.	1.1 Explain how the sales funnel impacts on the sales process. 1.2 Evaluate the sales cycle in a chosen organisation. 1.3 Evaluate techniques for identifying customer needs and wants. 1.4 Evaluate techniques for matching products and services to customer needs and wants. 1.5 Evaluate negotiation techniques.
2. Understand sales management	2.1 Explain different sales environments and their different requirements. 2.2 Evaluate the processes involved in the management of sales teams. 2.3 Differentiate between the skills needed for sales territory management and for account management
3. Understand how to measure sales performance	3.1 Explain the importance of sales performance measurements in monitoring and further improving sales. 3.2 Evaluate methods for measuring sales performance. 3.3 Analyse the use of sales performance information.

Indicative Content

1. Understand sales practices.

- Business Strategies: Sales Versus Marketing
- Bridging the Gap between Sales and Marketing
- Sales-oriented versus marketing-oriented companies

2. Understand sales management.

- Defining the marketing funnel
- Steps for successful sales o Committed and structured sale o Personal selling
- Reflecting on sales success
- Sales environments
- Managing sales teams
- Managing sales territories
- Managing sales accounts and key accounts
- Sales approaches
- Sales techniques

3. Understand how to measure sales performance.

- Sales performance measurements
- Key Performance Indicators
- Reward and compensation (i.e. pay, bonuses)

Unit Title	8: Marketing Communications
Unit Aims	This unit aims to develop knowledge of technological developments in e-marketing communications. Using this knowledge and understanding, learners will be able to assess the effectiveness of e-marketing communication within an organisation.
Unit Level	4
Guided Learning Hours	60
Credit Value	12
Unit Grading Structure	Pass
Assessment Guidance	Learners will need to demonstrate achievement of each Learning Outcome at the standards provided by the related Assessment Criteria. There is a requirement for learners to use actual examples from businesses to illustrate the points which are made and to support the demonstration of understanding. LOs which start with 'Know how to' require the learner to do what is stated.
Learning Outcomes – The learner will:	Assessment Criteria – The learner can:
1. Understand e-marketing communication characteristics.	1.1 Analyse how e-marketing communication takes place 1.2 Evaluate the success of e-marketing communication in increasing the effectiveness of a chosen organisation's marketing strategy.
2. Understand the use of e-marketing communication techniques	2.1 Explain how to integrate an e-marketing communication strategy with an organisation's overall strategic plan. 2.2 Evaluate the effectiveness of e-marketing communication techniques for different business scenarios.
3. Know how to measure the effectiveness of e-marketing communication.	3.1 Analyse factors affecting e-marketing communication 3.2 Suggest ways to overcome e-communication obstacles. 3.3 Propose and justify measurable criteria for assessing the effectiveness of e-marketing communication
4. Understand recent developments in e-marketing communication.	4.1 Evaluate recent developments in e-marketing communication.

Indicative Content

1. Understand e-marketing communication characteristics.
 - E-marketing communication characteristics
 - E-marketing communication
 - Developing e-marketing communications strategies
2. Understand the use of e-marketing communication techniques.
 - Planning e-marketing as part of an e-business strategy
 - marketing techniques on the Internet
 - Technology enabled automation
 - Customer Relationship Management (CRM)
 - Email marketing
 - Online presence
 - e-marketing techniques and tools
3. Know how to measure the effectiveness of e-marketing communication.
 - Factors affecting e-marketing effectiveness
 - Ensuring e-marketing effectiveness
 - Effectiveness as part of an e-marketing strategy
4. Understand recent developments in e-marketing communication.
 - Recent developments
 - Future e-marketing tactics
 - The role of the Internet for e-marketing techniques
 - Social networks in e-marketing
 - Modern methods of e-marketing

Unit Title	9: Customers and their Needs
Unit Aims	This unit aims to develop knowledge of the differing needs of customers. This includes building relationships with customers and satisfying them. Using this knowledge, learners will understand how to develop effective communications.
Unit Level	4
Guided Learning Hours	60
Credit Value	12
Unit Grading Structure	Pass
Assessment Guidance	Learners will need to demonstrate achievement of each Learning Outcome at the standards provided by the related Assessment Criteria. There is a requirement for learners to use actual examples from businesses to illustrate the points, which are made, and to support the demonstration of understanding. LOs, which start with 'Be able to' require the learner to do what is stated.
Learning Outcomes – The learner will:	Assessment Criteria – The learner can:
1. Understand the need to build relationships with customers and to satisfy their needs and wants.	1.1 Explain the way customer relationships are built and supported in different settings. 1.2 Analyse the importance of satisfying customer needs and wants. 1.3 Explain the use of relationship marketing between businesses.
2. Understand the ways in which quality contributes to customers' satisfaction with the organisation's products and services.	2.1 Discuss ways in which quality contributes to customer satisfaction. 2.2 Evaluate models for investigating aspects of service quality leading to customer satisfaction. 2.3 Explain how customer satisfaction can be measured.
3. Be able to categorise customers into various market segments to aid effective communication.	3.1 Demonstrate the correct use of different techniques in order to group customers and identify market segments. 3.2 Being able to conduct market research to gather information. 3.3 Explain how market research supports the process of market segmentation. 3.4 Describe communication systems in different markets 3.5 Analyse the role of user contribution systems.

Indicative Content

1. Understand the need to build relationships with customers and to satisfy their needs and wishes.

- Customer first
- Marketing concepts
- Relationship marketing in B2C
- Relationship marketing in B2B
- Customer information
- Retention of customers and repeat business
- Cross-selling, up-selling
- Internal markets
- Markets and communication
- User contribution systems

2. Understand the ways in which quality contributes to customers' satisfaction with the organisation's products and services.

- Key dimensions of quality
- Service quality
- The importance of customer satisfaction
- Measuring customer satisfaction

3. Be able to categorise customers into various market segments to aid effective communication.

- Market segmentation
- Socio-economic segmentation
- Using social grades in practice
- The need for a more complex analysis
- Geodemographic segmentation
- Multivariable segmentation
- Segments in the B2B market
- Market research

Unit Title	10: Information Technology in Business
Unit Aims	This unit aims to develop knowledge and understanding of the use of information technology in all areas of business including communications and marketing.
Unit Level	4
Guided Learning Hours	60
Credit Value	12
Unit Grading Structure	Pass

Assessment Guidance	Learners will need to demonstrate achievement of each Learning Outcome at the standards provided by the related Assessment Criteria. There is a requirement for learners to use actual examples from businesses to illustrate the points which are made and to support the demonstration of understanding.
Learning Outcomes – The learner will:	Assessment Criteria – The learner can:
1. Understand the role of IT in business today.	1.1 Discuss the need for IT solutions in business organisations. 1.2 Explain the role software and hardware components have in business operations.
2. Understand the impact on business of digital communications technologies.	2.1 Analyse how the Internet affects the way businesses operate. 2.2 Evaluate the importance of security and IT management in business.
3. Understand the approaches taken to manage information systems and the role of enterprise models in integrating the entire value chain.	3.1 Discuss the impact of digital management information systems on organisations' operations. 3.2 Explain the role of enterprise systems in integrating the entire value chain. 3.3 Analyse ways in which Enterprise Resource Planning can help business effectiveness.
4. Understand concepts in e-marketing and sales	4.1 Analyse e-marketing concepts 4.2 Analyse the importance of e-market segmentation. 4.3 Discuss the importance of data management to organisations 4.4 Analyse the use of Customer Relationship Management (CRM) systems in organisations
5. Understand the key areas to focus on when creating a successful company website.	5.1 Discuss the focus of successful company websites. 5.2 Explain the importance of Search Engine Optimisation for business websites.

Indicative Content

- Understand the role of IT in business today.
 - IT explained
 - The need for IT
 - Usefulness of Information Systems
 - Key aspects of IT
- Understand the impact on business of digital communications technologies.
 - The Internet and its history

- Intranets, Extranets and Security
 - Management Information Systems security compliance
 - Supply Chain Management
3. Understand the approaches taken to manage information systems and the role of enterprise models in integrating the entire value chain.
- Information integration across the value system
 - Upstream information systems
 - Downstream information systems
 - Information about competitors
 - The requirements of the enterprise
 - Strategic, management and transaction systems
 - Management Information Systems
 - The use of data in Management Information Systems
 - Global information systems
 - Managing global systems
 - Enterprise analysis
 - Enterprise Resource Planning
 - Ethical and legal issues
 - Dealing with personal data
 - Government role in information handling
 - Laws relating to data handling and management
4. Understand concepts in e-marketing and sales.
- E-marketing definitions
 - E-commerce concepts
 - E-commerce benefits
 - E-marketing segmentation
 - Online behavioural profiles
 - Online behavioural traits
 - Explaining the impact of the information age to social groups
 - Targeting customers in your chosen market segments
 - Market positioning
5. Understand the key areas to focus on when creating a successful company website.
- Website focus
 - Search Engine Optimisation (SEO)

Website

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