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Marketing managers and others who make strategic marketing decisions need to have sound understanding of their organisation’s overall marketing plan and objectives, and the types of activities that will best meet the organisation’s marketing needs.

There are many activities an organisation can use to promote its products and services. These activities form part of the promotional mix. Some activities will be similar and may overlap; other activities will be quite distinct. All activities must be compatible with the organisation’s requirements or overall objectives.

The marketing process

Determining the marketing needs of an organisation is essential before objectives can be identified and specific promotional activities planned. To identify marketing needs and relevant promotional activities, it is important to research the market extensively. This information must be analysed and decisions need to be made based on this information.

Here is an illustration demonstrating how the marketing process works.

**Analysis**
- Analysis of market environment; for example, data indicates that consumers in South Australia are unaware of the organisation’s products, which is a missed sales (and profit) opportunity.

**Need**
- Marketing need established; for example, need to make people in South Australia aware of the organisation and what it offers.

**Objective**
- Objective identified; for example, to gain 20% of the South Australian market within 12 months.

**Strategy**
- Strategy implemented; for example, a direct email/marketing campaign aimed at new South Australian clients.

**Promotion as part of the marketing plan**

Promotion is one aspect of an organisation’s overall marketing plan. It is one of the ‘four Ps’ in the marketing mix, along with product (what is the product or service you are selling?), price (how much will you sell the product or service for?) and place (how and where the item is sold/distributed).
In personal selling, the sales representatives essentially represent the face of the organisation to the customer. Therefore, interactions between the two need to be carefully planned and managed by the organisation.

Personal selling is effective because customers are treated as individuals and their unique needs, concerns and questions can be addressed and met. It is also very effective in building positive and personal relationships with customers on a long-term basis.

**Public relations**

Public relations (PR) activities are geared towards developing and sustaining a positive image or brand for the organisation and for its products and services.

PR provides consumers, the general public, shareholders, potential investors, employees and government agencies with information regarding the organisation and its position within the industry and the broader community.

This does not necessarily mean communicating information regarding the organisation’s products and services, but is more focused on the image of the business. Some examples follow.

<table>
<thead>
<tr>
<th>PR activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Organisational publications</td>
</tr>
<tr>
<td>• Media releases</td>
</tr>
<tr>
<td>• Involvement in activities benefiting the community</td>
</tr>
<tr>
<td>• Fundraising for community events</td>
</tr>
<tr>
<td>• Sponsorship of charities, special events, local sporting clubs or community events</td>
</tr>
</tbody>
</table>

**More promotional methods in the mix**

Here are several methods used in promoting goods, services, information, events and ideas. These may be key methods for organisations and their campaigns at different times.

**Publicity**

In contrast to PR, publicity is more concerned with informing the public or particular customer groups about the organisation’s products or services in order to raise awareness and develop positive attitudes towards the product/service.

However, there are no direct costs incurred by the organisation in obtaining publicity. Publicity arises as a by-product of a third party publicising the organisation and its products/services. Publicity is essentially free and can provide the business with a more credible and independent source of promotion. It can take the form of media announcements.

However, publicity cannot be controlled by the organisation and can be negative as well as positive. Negative publicity will have a detrimental effect on the business.
‘Advertising to owners is a pointless task. We’d be wasting our money if we took out ads in Italian newspapers, for instance, because they’re a very select group of people who wouldn’t respond to that kind of “blanket” advertising. Our approach is to have several agents who live in Italy but work for us. They are all Italian speakers, well-spoken and professional in their appearance and conduct. In most cases, they live in the areas they work in. This is important because they represent our company but also have to develop rapport with the villa owners, who are in many cases very wealthy people who are willing to rent out their holiday homes for certain periods of the year.

‘Our agents conduct one-on-one meetings with villa owners and take the time to explain exactly what services we offer – how we make sure guests will look after their homes, the way we market their properties and the way we run our business. This personal approach is the only effective way we can get, and keep, such an extensive list of quality properties, and that makes all the difference in a crowded market where consumers are spoilt for choice.’

**Practice task 1**

1. Think of a large, well-known organisation such as Myer or Woolworths. Explain how these promotional activities could be used to support the marketing objectives of the organisation in relation to one or more products or services.

<table>
<thead>
<tr>
<th>Promotional activity</th>
<th>Product/service and objective</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertising</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Client functions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*continued*
Market segments/target audience

Within each market, there are various groups of customers the organisation may decide to focus its promotional efforts on. These are ‘market segments’ or groups of similar customers.

Rather than attempting to focus promotional efforts on all customers within the market, the organisation will usually identify one or more market segments to target. In a promotional context, these segments represent the target audience or public.

When planning and scheduling promotional activities, the organisation must clearly define the target audience. The mix of promotional activities used must be geared towards the target audience/s. The promotional activities used must be consistent with the people the campaign is aiming to influence.

Here is an example of how a target audience may be defined using marketing segmentation.

<table>
<thead>
<tr>
<th>Geographical</th>
<th>Region, state, population density, population growth rate, climate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demographic</td>
<td>Age, gender, ethnicity, education, occupation, income level, family status</td>
</tr>
<tr>
<td>Behavioural</td>
<td>Current users of product/service versus non-users, product/service usage rate, price sensitivity, brand loyalty, benefit/s sought in purchasing, innovators, opinion leaders</td>
</tr>
<tr>
<td>Psychographic</td>
<td>Personal values, lifestyle and attitudes</td>
</tr>
</tbody>
</table>

Customer needs

All customers and potential customers have needs that must be fulfilled if they are to be influenced by the promotional activities of the organisation and so purchase its products and services. Customer needs determine which promotional activities the target audience will be receptive to and influenced by.

While every customer has different needs and reasons for purchasing a particular product or service, there are some generic needs that can be used to analyse customers within the target audience/s to help determine which brand of products/services they will buy from which organisation and which promotional activities they will be most receptive to.

The needs of the target market/audience must be clearly identified if the organisation’s promotional activities are to be planned effectively. In understanding the reasons that customers purchase a particular brand or type of product/service, the organisation develops insights into how to promote its products and/or services to this customer group most effectively. Promotional activities should be planned and scheduled based on the needs of customers.
Promotional activities need to be effectively planned and scheduled if the organisation’s ultimate marketing and promotional objectives are to be achieved.

The promotional plan provides a framework for the organisation’s promotional activities. The foundation of any promotional plan is the development of objectives or goals – what will the organisation’s promotional efforts achieve?

### Determine promotional objectives

Promotional objectives are usually outlined in the organisation’s marketing plan or corporate plan. Therefore, actually determining these objectives is often not the responsibility of those who implement the marketing and promotional activities.

The obvious objectives or aims of a promotional campaign may be:

- to generate or increase sales
- to increase awareness and knowledge of the organisation, or a product, service or brand
- to create or alter an image of the organisation in the marketplace
- to change consumers’ attitudes to a product, service or brand
- to increase the response to a product, service or brand from a particular demographic group
- to improve or maintain market share
- to retain existing customers
- to provide a reason to buy a product or service.

### Determine roles and responsibilities

Make sure you are familiar with the title, role and responsibilities of those people in your organisation who are involved in the planning, implementation and review of promotional activities. Take time to clarify your own responsibilities and identify those of team members, the people you need to report to for approval of plans, those responsible for budgets and time lines, and those you can approach for suggestions and support.

If it is your responsibility to contribute to the development of promotional objectives, you must clearly define exactly what the promotional program is designed to achieve. Promotional objectives evolve from the organisation’s overall marketing plan and the identification of its target customer and audience groups.

Responsibility for the promotion of products and services differs markedly between organisations.

Here is a brief overview of the variations in roles and responsibilities between large and small companies.

#### Large companies

Some large companies have an entire department devoted to marketing and promotions, with a manager and staff of writers, publicists and project coordinators.
Consult with designated individuals and groups

When developing promotional objectives, there will be various individuals and groups within the organisation who need to be consulted. Their input is required to ensure promotional objectives are consistent with the overall organisational strategy and any organisational requirements.

Here are examples of the consultation process that could take place with a number of people within an organisation.

**Supervisor**

Your supervisor can provide you with guidance, advice and support on a range of issues. Supervisors are also able to speak on your or the team’s behalf at a higher level within the organisation and can link you with a wide network of people who could assist in determining which promotional strategies are preferred. If you are new to your role and your supervisor has worked in the team for some time, there is no better person you can consult about what promotional strategies have worked in the past, and the processes and activities you need to complete in developing the promotional plan.

**Line management**

In addition to your supervisor, you may need to seek and gain approval from other line managers throughout the organisation who have an interest in the overall promotional activities. Line managers can also be a great source of advice and information, so consult with any you feel could assist you and provide advice and guidance as you determine suitable promotional plans and objectives.

**Customers**

Customers should be consulted to determine what mix of promotional activities would appeal to them. This feedback is usually obtained via market research, which will provide information on issues such as:

- how various customer groups are defined
- how well each group will respond to a particular promotional activity
- how effectively each group rates the organisation’s past promotional activities
- the media habits of each customer group in terms of which magazines and newspapers they read, radio stations they listen to and TV programs they watch
- where the organisation can most effectively place its promotional efforts.
Examples: budgets

Here are some examples of budgets for promotional activities.

### Budget for an exhibition

<table>
<thead>
<tr>
<th>Promotional activity</th>
<th>Costs involved for each task</th>
<th>Total cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exhibiting at a trade fair</td>
<td>Stall hire =</td>
<td>$250</td>
</tr>
<tr>
<td></td>
<td>Production of 300 catalogues:</td>
<td>$150</td>
</tr>
<tr>
<td></td>
<td>design and desktop publishing =</td>
<td>$35</td>
</tr>
<tr>
<td></td>
<td>editing (in-house: 1 hr @ $35 ph) =</td>
<td>$125</td>
</tr>
<tr>
<td></td>
<td>printing (Quick Copy) =</td>
<td>$125</td>
</tr>
<tr>
<td></td>
<td>Production of 500 giveaway pens =</td>
<td>$200</td>
</tr>
<tr>
<td></td>
<td>Production of 500 giveaway notepads =</td>
<td>$120</td>
</tr>
<tr>
<td></td>
<td>Three staff @ $40 ph for 3 hours =</td>
<td>$360</td>
</tr>
<tr>
<td></td>
<td>Gift basket for business card prize =</td>
<td>$85</td>
</tr>
</tbody>
</table>

### Budget for a conference

<table>
<thead>
<tr>
<th>Promotional activity</th>
<th>Costs involved for each task</th>
<th>Total costs – company</th>
<th>Total costs – sponsor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Venue:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>One plenary room and five breakout rooms</td>
<td></td>
<td>$7,090</td>
<td>$8,090</td>
</tr>
<tr>
<td>Audio-visual equipment</td>
<td>Included in venue cost</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Catering</td>
<td>(130 delegates)</td>
<td>$1,000</td>
<td></td>
</tr>
<tr>
<td>Pre-conference flyers:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>design</td>
<td></td>
<td>$500</td>
<td>$800</td>
</tr>
<tr>
<td>printing</td>
<td></td>
<td>$500</td>
<td>$200</td>
</tr>
<tr>
<td>Promotion:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postage for mail-out of flyer and program</td>
<td></td>
<td>$5,134</td>
<td>$5,134</td>
</tr>
<tr>
<td>Advertising</td>
<td>Cost covers both postage and advertising</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speakers (payment):</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appearance fee x 5</td>
<td>Five speakers @ $250 =</td>
<td>$1,250</td>
<td>$1,250</td>
</tr>
<tr>
<td>Travel expenses x 3</td>
<td>Three people @ $833.33 =</td>
<td>$2,500</td>
<td>$2,500</td>
</tr>
<tr>
<td>Speakers (gifts):</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dinner x 5</td>
<td>Five speakers @ $100 =</td>
<td>$500</td>
<td>$500</td>
</tr>
<tr>
<td>Gifts for workshop presenters (gift voucher, wine, flowers) x 5</td>
<td>Five speakers @ $80 =</td>
<td>$400</td>
<td>$400</td>
</tr>
</tbody>
</table>

continued...
1. Promoting products and services is a three-step process, involving planning promotional activities, coordinating activities and then reviewing and reporting on these activities.

2. The organisation’s promotional plan is a sub-section of its overall marketing plan. The promotion supports the overall marketing objectives of the business. Marketing and promotional objectives need to be aligned with the organisation’s corporate objectives.

3. As part of its promotional mix, the organisation has a range of promotional activities it can use as part of its promotional strategy, including advertising, sales promotions, web pages, personal selling, public relations and publicity, employee functions, client functions and direct marketing.

4. In determining which promotional activities to implement, organisational requirements must be considered that could impact on and influence which activities are chosen. These requirements include the organisation’s overall goals and objectives, quality assurance procedures, legal requirements, confidentiality and ethical considerations, and pricing and discount policies.

5. At a fundamental level, promotional objectives can range along a continuum of effects or desired responses from the promotional activity – awareness, knowledge, liking, preference, conviction and purchase.

6. Promotional plans and objectives need to be developed in consultation with key stakeholders, such as supervisors, customers, colleagues, external organisations, committees, line managers and third parties.

7. There are several factors that affect the promotional activities and strategies an organisation should use, such as the type of market the organisation operates in, market segments/target audiences being focused on, customer needs, the organisation’s market share of the business and the promotional trends of the market.

8. Promotional activities need to be budgeted for. The most common budgeting methods are the promotional objectives and tasks method (the preferred method), percentage of sales method, competitive analysis method and affordable method.

9. Firm time lines and action plans need to be developed; they act as a schedule to coordinate promotional activities and the tasks required in implementing them.
The task of coordinating the personnel and resources required to implement promotional activities is complex and requires thorough examination to identify how you are going to coordinate the organisation’s people and resources to implement the promotional plan.

The list of tasks required will depend on the type of promotional activity being implemented. For example, placing an advertisement does not require the same amount of time, number of people or effort required to stage an in-store promotion. Developing and maintaining a website is an ongoing activity that will not require the sustained short-term effort of preparing for a trade fair exhibit.

After identifying each promotional activity and breaking it down into the various tasks that must be completed, you need to make a list of all the people and resources required to properly complete each task. This can be a difficult exercise requiring extensive analysis, judgment in forecasting and the ability to act logically and quickly when things do not go according to plan.

**Coordinate promotional activities**

What might the steps involved in coordinating promotional activities look like? An example is provided below, showing the steps involved in a promotional activity with extended planning time available. It shows the steps that could be taken by a staff member with promotional responsibilities who was experienced in their role, and how they could go through each promotional activity at the start of the financial year and make a list of the resources they needed for each task. A to-do list could then be created and referred back to while the promotion was being organised.

Here are the most common steps to undertake when coordinating a new promotional activity.

<table>
<thead>
<tr>
<th>Coordinating a new promotional activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Determine how much money is available for activity from budget.</td>
</tr>
<tr>
<td>• Make a list of all items that must be arranged e.g. letters, catering, management briefs.</td>
</tr>
<tr>
<td>• Set up meetings with staff who are likely to be key to the event’s success.</td>
</tr>
<tr>
<td>• Explain, discuss, clarify the promotional activity and elicit ideas and issues from key staff.</td>
</tr>
<tr>
<td>• Develop a draft agenda.</td>
</tr>
<tr>
<td>• Add to and fine-tune resource and to-do lists.</td>
</tr>
<tr>
<td>• Present draft agenda to manager and refine it further.</td>
</tr>
</tbody>
</table>
Prepare checklists

It is a good idea to prepare a checklist of tasks and the date each task must be completed by. Also include any meetings that must be held. If the promotional activity is a long-term or complex project involving many tasks, it is effective to break up the entire activity into several smaller stages. Each stage then effectively acts as a milestone indicating when progress has been made and the next stage of the process can begin.

A software application, such as Microsoft Project, is useful because it can generate a time plan quickly and easily once you have entered the tasks to be done, when the tasks should begin and an estimation of how long it will take to complete them.

However, tables or lists can work just as well and require no special software. Here is an example of a list that shows each task and allocates a due date.

<table>
<thead>
<tr>
<th>Task</th>
<th>Date due</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respond to letter from the college requesting sponsorship; clarify details of sponsorship requirements</td>
<td>3 April</td>
<td></td>
</tr>
<tr>
<td>Hold first coordination meeting with Roger</td>
<td>4 April</td>
<td></td>
</tr>
<tr>
<td>Send logo to college for inclusion on advertising material – Wendy</td>
<td>6 April</td>
<td></td>
</tr>
<tr>
<td>Prepare speech – liaise with Roger</td>
<td>16 May</td>
<td></td>
</tr>
<tr>
<td>Hold second coordination meeting with Roger</td>
<td>18 May</td>
<td></td>
</tr>
<tr>
<td>Prepare cheque for $2000 – Craig</td>
<td>28 May</td>
<td></td>
</tr>
<tr>
<td>Arrange for banner to be sent to college</td>
<td>29 May</td>
<td></td>
</tr>
<tr>
<td>Attend presentation evening</td>
<td>3 June</td>
<td></td>
</tr>
</tbody>
</table>

Lead time

Be aware of the lead time required for certain aspects of each activity. For example, if a promotion involves sending out a piece of direct mail to 500 customers, you will need to have the item to be sent (for example, a brochure) printed by a specific date, as well as having envelopes and labels ready to use. This means calculating how long it will take to design the brochure, prepare the copy and have it printed or copied. It also means organising the database of contacts, purchasing envelopes and printing address labels.

Always allow more than enough time to complete a particular task. Allow time not only for the task to be completed, but also for any follow-up tasks or contingency measures required in the event of problems occurring.
It may be your responsibility to source and recommend appropriate venues for promotional activities. Make sure the venue requirements are identified early in the planning process so suitable locations can be found and alternative venues sourced if necessary.

Venue requirements include:
- capacity; for example, for 200 people
- access to power for an electronic presentation
- a whiteboard
- a kitchen for heating food
- a room for a product display as well as tables for food
- safety precautions
- access for people with disabilities
- sufficient car parking.

Promotional products and samples

Many promotional activities involve providing small gifts or samples of the organisation’s products or services. Typical promotional products include pens, notepads, mouse pads, caps, satchels, T-shirts and umbrellas with the organisation’s name and logo.

You may be responsible for organising the assembling of these with an external company, preparing the samples yourself or coordinating their distribution.

Many organisations prepare a presentation pack to give to new and potential clients that includes items such as material about the company, a product and services catalogue, a price list and testimonials from satisfied customers.

It is important when coordinating a promotion that involves providing promotional products or services that these products are available and within the budgetary guidelines of the promotion.

Although these items may be free or a bonus for clients and customers, their purpose is to create an overall image of the organisation and so these promotional efforts are important. Therefore, it is essential to plan for these items when implementing a promotional program.

Example: prepare a presentation kit

Lucy is the marketing coordinator for a college that teaches beauty therapy. Staff were attending a careers and employment expo and wanted useful information on hand to give out to people.

Lucy explains the process she went through to organise the kit.

‘We already had cardboard folders that we use when we send information to people in the mail and on open days. They have our company logo printed on them and look really good.

‘We also have a guide to courses booklet, so I included a copy of that in each kit because it is up to date and is also designed and printed in our corporate style. I then came up with the idea of doing a frequently asked questions sheet that answers questions prospective students usually want to ask about fees, term dates, supplies they need to buy and job prospects.

continued ...
Here is an outline of important considerations in allocating roles and responsibilities.

**Job descriptions**

In allocating roles and responsibilities to personnel, you need to consider whether the task you are allocating fits within the person’s overall job description and corresponding salary and employment conditions. Uncertainty with any of these or other employment-related issues can be clarified with HR by gaining access to the relevant job descriptions, terms of employment and employment conditions.

**Competence**

All personnel have different skills, qualifications and abilities. In allocating roles and responsibilities for implementing a promotional activity, it is essential that you are aware of the levels of knowledge, skills and competence required by the incumbent in performing each task. If you believe a particular team member does not have the knowledge and skills required for the role, then you should assess whether they can be trained or educated to obtain the desired level of competence enabling them to perform the task.

**Organisational policies**

Organisations have policies and procedures in place that govern how work is performed and by whom. It is important that you are aware of these policies because they may affect which personnel/teams can perform certain promotional tasks.

**Marketing plan**

As with organisational policies, the organisation’s overall marketing plan may specify which personnel/teams are responsible for implementing certain promotional tasks and who has responsibility for different aspects of the promotional plan.
Communication skills

Good communication skills are an asset to staff working at all levels of an organisation.

In your work life, you will encounter customers and colleagues of different ages, races, religions and levels of expertise or ability, among many other things. You will communicate with people in writing and verbally in many different situations.

The communication techniques listed below assist customer service staff to communicate effectively. The same techniques assist staff with responsibilities for promotional activities to actively participate in verbal exchanges and clarify, explain and present information relating to promotional activity.

<table>
<thead>
<tr>
<th>Speaking clearly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speak clearly and use appropriate vocabulary and an effective pitch and intonation. This is how you use your voice to show extra information, such as whether you are asking a question, whether you are surprised or sympathetic, what your attitude is, e.g. a respectful attitude or an arrogant attitude.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Listening and questioning</th>
</tr>
</thead>
<tbody>
<tr>
<td>When you are being given a lot of information verbally, you need to listen actively and may need to ask clarifying questions or read back a summary of the details you have noted, to clarify that all details are correct. An example of a clarifying question is ‘Have I got it right?’</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Open and closed questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asking someone an open question gives that person an opportunity to give you information that they regard as important. An example of an open question is ‘What do you think about that?’</td>
</tr>
<tr>
<td>A closed question is asked when you want to know if something happened or didn’t happen, is true or isn’t true and so on. An example of this is ‘Can you finish this by Friday?’ These may require only a one-word answer; for example: ‘What time can we catch up on Friday?’</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Further tips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limit background noise and other distractions and barriers to communication. Use nods, smiles and other nonverbal indicators to show you are listening and understand.</td>
</tr>
</tbody>
</table>
Topic 2
Coordinate promotional activities

Your social circle

Real-life example
Margaret called Stacey, a PR consultant and a friend of a friend, to help write a press release for a new product launch.

Media networks

Real-life example
Lou, a media manager for a big IT company, uses an internet-based media board to post notices about recent developments in his corporation.

Customer group

Real-life example
An insurance company has set up state-based groups where brokers who sell its insurance products meet twice monthly to swap information, catch up on new products and listen to professional development seminars.

Word-of-mouth marketing as a promotional tool

Word-of-mouth marketing is one of the most powerful promotional tools an organisation can have. All customers have networks. Some customers have wide, powerful networks of friends and colleagues who will recommend your organisation’s products and services.

Even though each recommendation may only be influencing one person at a time, many people can be influenced by just one satisfied customer – another reason to keep customers happy through good-quality products and great customer service.

Practice task 9

Provide one example from each of these different types of networks that you could use in the coordination and design of promotional activities:

• professional associations
• company networks
• co-workers
• your social circle
• media and promotional networks
• customer groups.

continued ...
Evaluation of the organisation’s promotional campaign should involve a review of each element of the promotional mix. The success of the promotional campaign in achieving the overall promotional objectives should also be assessed, based on the analysis of each promotional mix element.

Ultimately, the impact of promotional activities should be assessed based on their performance in meeting the promotional objectives of the organisation. But how does the organisation measure this? What indicators exist that can provide insight into whether these objectives have been achieved?

Here is an illustration of the continuous review process.

### Measure the impact of promotional activities

Establishing a cause-and-effect relationship between promotional activities and the subsequent benefits to the organisation is difficult. However, in determining the effect of promotional activities, there are several sources of feedback and data that can provide insight into the impact of promotional activities on the performance of the organisation.

Sources of data on the impact of promotional activities include:

- sales figures
- brand awareness
- customer surveys
- informal discussions with customers
- informal discussions with staff
- focus group discussions
- tracking of website visits
- market share data.
Staff feedback

Staff who come into contact with customers and attend events such as trade fairs, launches and product seminars are an invaluable source of informal feedback on promotional effectiveness. Staff can record the feedback and comments they receive, such as the number of people who visited the organisation’s booth at a trade fair, the types of questions they were asked, whether they think the time spent on promoting products and services was worthwhile and how many new customers they believe they attracted.

Staff provide another vantage point from within the organisation to help in assessing the impact of promotional activities.

Other ways to evaluate the effectiveness of promotional activities

Here are other sources of information, which may require the support of staff with technical or other specialised skills.

Tracking of website visits

Tracking the number of visits made to a website makes it possible to identify the number of people who have visited the site over the period of a promotional activity. During this period, customers can be invited to comment on the activity and enter their name and contact details in order to be eligible for a prize. These visits can be followed up with a phone call or email seeking further information.

Market share data

Plotting market share statistics to see whether there has been any gain by your organisation over a specific period is another good indicator of successful marketing and promotion. However, the results of promotional activity on market share are not always immediate and other factors such as the economic climate may need to be taken into account.

Targeted group discussions/focus groups

A valuable exercise is to invite a group of consumers to talk about their perceptions of a promotional strategy. Appropriately prepared questions may help to stimulate the group. In a relaxed environment, people are more likely to talk freely and without fear of reprisal for comments made. Results from focus groups can be thought provoking and challenging, and may lead to useful feedback for assessing the effectiveness of promotional activities.
The personnel involved in implementing a promotional activity must be provided with feedback on their performance in order to identify areas of improvement and areas of strength to be modelled during the next promotional campaign. These can be people and teams both within and outside the organisation.

Feedback to personnel should analyse whether:
- the choice of promotional activity was appropriate
- the time lines were sufficient
- the method of performing the activity used by staff was appropriate
- the desired quality was achieved
- there were any difficulties with outsourced tasks
- the budget was met.

**Collect feedback**

An activity overview sheet can be used to record specific aspects of a team member’s performance in carrying out their duties in planning and implementing promotional activities.

This type of analysis can also be carried out for the team as a whole in assessing its efforts in implementing promotional activities.

This assists you in preparing a final assessment of team members’ performance, as well as when planning for future activities.

**Provide feedback**

If it is your responsibility to collect sales figures or other feedback data on the performance of team members, then you may need to pass this onto the marketing manager or team leader, or present it at a staff meeting.

Make sure you know in advance the format they expect to receive this information in. Often managers have certain expectations in terms of how information is to be presented or your company may have forms or templates (in hard copy or on the computer system) you are required to use when conveying such information.

There may also be established distribution lists that you need to provide data to. Again, these may be written down somewhere or set up as lists in your organisation’s email system.
The information gained from reviewing and reporting on the organisation’s promotional activities can be used to provide constructive advice to management and staff in making decisions about future promotional events.

Promotional planning and implementation should include:

- reporting, which should be conducted at regular intervals (such as every quarter or six months) or as required
- holistic planning, which draws on recommendations from the promotional reports and takes broader issues into account like the organisation’s business plan and objectives.

**Make recommendations for continual improvement**

Recommendations for future promotional plans can focus on a range of solutions depending on the size of the organisation, the nature of its business, the funding available and the needs of its customers.

A well-structured report document that uses clear and specific language will be understood by a range of audiences. Use headings and sections to increase the readability of your reports.

Here are suggested topics to cover in a report on future directions for promotional activities.

- **Review**
  
  A review of what could be done better should be conducted after each promotion has concluded; include a report on this review.

- **Overview**
  
  Give an overview of the activity undertaken including a brief description, time frames and objectives.

- **Human resources**
  
  Provide a list of people who had responsibility for the project, including third parties, and what these responsibilities were.
Under-planned activities

**Example:** an organisation reacts to competitor activities and achieves little success in its promotional activities.

**Solution/recommendations:**
Prepare a calendar of events to meet the needs of both the organisation and the customer; for example:
- one major event
- an ongoing display advertisement in the Yellow Pages
- a series of smaller activities such as a catalogue mail-out, client breakfast and special offers.

Over-expensive activities

**Example:** activities cost too much in terms of both time and money.

**Solution/recommendations:**
Plan a series of smaller activities, such as:
- an electronic newsletter
- regular discounts and special offers
- media releases.

Lack of customer contact

**Example:** an organisation finds it needs more activities with customer contact, rather than placing advertisements and producing catalogues.

**Solution/recommendations:**
Plan customer-focused activities, such as:
- an in-store promotion
- client breakfasts
- personal visits
- presentations
- a telephone or email campaign.

Unfocused activities

**Example:** an organisation’s activities do not seem to have any focus but include the usual brochures and letters.

**Solution/recommendations:**
Plan focused activities, such as:
- developing an attractive, eye-catching and informative website
- preparing one major promotion with a theme
- including follow-up activities throughout the year
- focusing on promoting the benefits of products or services to specific target groups.