



Coordinate production of brochures and marketing materials

D2.TCS.CL5.06

Assessor Manual



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& hospitality

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Competency Based Assessment (CBA) – An Introduction for Assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

Suggested Assessment Methods

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

Alternative Assessment Methods

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

- a) The nature of the unit
- b) The strengths of participants
- c) The number of participants in the class
- d) Time required to complete assessments
- e) Time dedicated to assessment
- f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes

- Case studies
- Log books
- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the 'Other' section within the 'Competency Recording Sheet'.

Selection of Assessment Methods

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

'Sufficient' evidence to support the 'Pass Competent'/'Not Yet Competent' decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

Assessing Competency

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- 'Pass Competent' (PC)
- 'Not Yet Competent' (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

Not Yet Competent' (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

- a) Undertake further training or instruction
- b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Regional Qualifications Framework and Skills Recognition System

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework
- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

Recognition of Prior Learning (RPL)

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

Code of Practice for Assessors

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them
- Candidates with assurance of the standards of practice expected of assessors
- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary
- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes

- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes
- The candidate is made aware of rights and process of appeal
- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and Checklist for Assessors

Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

Briefing Checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

Checklist for Assessors

Prior to the assessment I have:	Tick (✓)	Remarks
Ensured the candidate is informed about the venue and schedule of assessment.		
Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP).		
Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process.		
Identified and accommodated any special needs of the candidate.		
Checked the set-up and resources for the assessment.		
During the assessment I have:		
Introduced myself and confirmed identities of candidates.		
Put candidates at ease by being friendly and helpful.		
Explained to candidates the purpose, context and benefits of the assessment.		
Ensured candidates understood the assessment process and all attendant procedures.		
Provided candidates with an overview of performance criteria to be assessed.		
Explained the results reporting procedure.		
Encouraged candidates to seek clarifications if in doubt.		
Asked candidates for feedback on the assessment.		
Explained legal, safety and ethical issues, if applicable.		
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

Instructions for Recording Competency

Specifications for Recording Competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate
- This Competency Recording Sheet is located at the end of the Assessment Plan
- It is the overriding document to record competency
- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs
- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate
- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate
- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed
- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings
- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

Instructions for Different Assessment Methods

Specifications for Work Project Assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected
- Prepare sufficient resources for the completion of work activities including:
 - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
 - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place

- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):
 “At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.
 These work projects are part of the formal assessment for the unit of competency titled X:
- You are required to complete these activities:
 - a) *Using the 'X' method of assessment*
 - b) *At 'X' location*
 - c) *You will have 'X time period' for this assessment*
- You are required to compile information in a format that you feel is appropriate to the assessment
- Do you have any questions about this assessment?”
- Commence Work Project assessment:
 - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
 - Participants complete work projects in the most appropriate format
 - Participants must submit Work Project evidence to the assessor before the scheduled due date
- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
 - Enter Student name
 - Enter Assessor name
 - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment
- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):
“These oral questions are part of the formal assessment for the unit of competency titled X.

There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.

We have 60 minutes for this assessment.

- I will give you feedback at the end of the assessment
- Do you have any questions about this assessment?”
- Commence Oral Questioning assessment:
 - Complete Assessment Record for the Oral Questioning by:
 - a) Ticking PC or NYC, as appropriate
 - b) Entering ‘Remarks’ as required
 - c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of ‘Written Questions’ for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a ‘X’ is identified, please input appropriate information):

“These written questions are part of the formal assessment for the unit of competency titled X.

There are X questions and you are required to answer all of them to the best of your ability.

You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

We have X time for this assessment:

- The due date for completion of this assessment is X
- On this date you must forward the completed questions to the assessor by X time on the date of X
- Do you have any questions about this assessment?”
- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date

- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Observation Checklist

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate
- Insert assessor name
- Insert identify of location where observations are being undertaken
- Insert date/s of observations – may be single date or multiple dates
- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill
- Provide written (and verbal) feedback to candidate – as/if appropriate
- Sign and date the form
- Present form to candidate for them to sign and date
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

Specifications for Third Party Statement

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name
- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
 - Pass Competent = Yes
 - Not Yet Competent = No
 - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.

Competency standard

UNIT TITLE: COORDINATE PRODUCTION OF BROCHURES AND MARKETING MATERIALS		NOMINAL HOURS: 70
UNIT NUMBER: D2.TCS.CL5.06		
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to manage the production of brochures and marketing materials.		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1: Identify the context for brochures and marketing materials</p> <p>1.1 Determine the <i>factors that apply</i> to the production of <i>brochures and marketing materials</i></p> <p>1.2 <i>Plan the production</i> of items</p> <p>1.3 <i>Develop action plans</i> for individual brochures and marketing materials</p> <p>Element 2: Manage inclusions for brochures and marketing materials</p> <p>2.1 Determine the <i>target(s) for the items</i></p> <p>2.2 Determine the <i>content for the items</i></p> <p>2.3 Determine <i>format and layout for the items</i></p> <p>2.4 Determine <i>language for the items</i></p> <p>2.5 Determine the <i>prices to be stated in the items</i></p> <p>2.6 Determine the <i>copy for the items</i></p>	<p>Unit Variables</p> <p>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment.</p> <p>This unit applies to organisations that are involved in producing brochures and marketing materials within the labour divisions of the hotel and travel industries and may include:</p> <ol style="list-style-type: none"> 1. Travel Agencies 2. Tour Operation <p><i>Factors that apply</i> may be related to:</p> <ul style="list-style-type: none"> • Objectives • Target market(s) • Analysis of the brochures and marketing materials being used by competitors • Required or preferred style and size of materials including consideration of demands placed on brochures and marketing materials by others in the marketing and distribution chain • Time parameters including seasonal considerations, and the relationship between product release and the need to promote that product 	

Element 3: Administer activities relating to the production of draft items

3.1 *Provide resources* for the production of draft items

3.2 *Proof read material*

3.3 *Circulate items for comment* and feedback

3.4 Revise brochures and marketing materials

Element 4: Obtain quotations for production of brochures and marketing materials

4.1 *Meet and discuss the proposal with service providers*

4.2 Provide *detailed specifications* as the basis for obtaining a quotation for work to be done

4.3 *Obtain quotations* from a range of service providers

4.4 *Evaluate quotations* received to make a purchasing decision

4.5 Select the service provider(s) to supply services and lodge official order

Element 5: Administer activities relating to the production of final items

5.1 *Monitor production activities* undertaken by selected service providers

5.2 Ensure payment to service providers, as agreed

- Budget including consideration of joint venture marketing initiatives
- In-house production capabilities and their availability to produce materials that align with designated timeframes
- Internal and external distribution considerations including cost of distribution, required quantities, language(s) to be used, target market(s) and intermediaries in the distribution chain
- Availability of information that needs to be included in the marketing materials, including relevance, currency and copyright clearance
- Organisational image including consideration of the need to either maintain or extend the existing image, or the need to alter the image
- Legal restrictions and restrictions that may apply including need to ensure accuracy, comprehensiveness and truthfulness in content, detail, descriptions, representations and statistics.

Brochures and marketing materials may include:

- Product and service brochures
- Destination guides
- Promotional flyers and leaflets
- Conference programs and registration/advertorial forms
- Event prospectus
- Display material
- Information kits
- Product support materials
- Advertising materials
- Direct mail items
- Invitations
- Merchandising goods.

5.3 Identify and use alternative service providers where production timelines are not being met

5.4 *Proof read material that is produced as final items* for approval prior to full production

5.5 *Authorise production* of final items

5.6 *Check items supplied by service providers as final items*

Plan the production will include:

- Identifying the type, nature and volume of items to be produced
- Integrating materials with organisational plans, goals and objectives
- Developing expected outcomes for the brochures and marketing materials
- Identifying methods to evaluate the impact of brochures and marketing materials
- Involving relevant others in the process
- Clarifying resources available to achieve the expected outcomes
- Identifying issues that may impact on developing and producing materials.

Develop action plans may be related to:

- Identifying, detailing and clarifying individual steps to be undertaken in the development and production phases
- Allocating resources to the development and production phases
- Identifying individual responsibilities for the pre-development and production phases including the roles of internal and external people
- Specifying timelines and target dates for the completion of components of each plan
- Referring to previous marketing activities as a basis for future marketing activities
- Seeking input and comment from relevant stakeholders as appropriate to individual project requirements
- Communicating the contents of action plans with relevant stakeholders to explain specific requirements and responsibilities that apply.

Target(s) for the items may relate to:

- Internal customers
- External customers, including other organisations within the marketing and/or distribution chain and designated customer target markets

	<ul style="list-style-type: none">• The geographical location of the customer• Consideration of market research data relating to targets, including demographic characteristics and data relating to customer regarding how they prefer to receive their information. <p><i>Content for the items</i> may relate to:</p> <ul style="list-style-type: none">• Products and services to be targeted in the material, including consideration of individual products, services and combination packages• Currency of the items, including estimating the potential lifespan for each item taking into account prices, costs and changing circumstances as they apply to individual projects• Alignment with stated objectives• Logos, text/copy, graphics, art work and photographs• Mandatory inclusions including company logos and statements, contact details, affiliations and indications of Quality Assurance (QA) alignment• Seeking input from relevant internal personnel and external stakeholders, including consideration of sub-agents and joint venture partners. <p><i>Format and layout for the items</i> may include:</p> <ul style="list-style-type: none">• Selecting single page leaflets, bi-fold and/or tri-fold options• Determining font to be used throughout or in defined sections of the items• Identifying print size to be used• Determining the use of colour, including consideration of black and white, limited colour or full-colour• Determining length of the finished product in terms of pages• Selecting stock size, quality and colour to be used for page layouts incorporating distribution considerations, such as mailing, costs, stocking and display requirements of distributors
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- Positioning text, graphics, photographs on the stock or marketing item
- Enabling sufficient space for required text and information
- Liaising with internal and/or external graphic artists and printers
- Applying basic design principles, including aesthetic appeal, harmony, flow and sequencing, balance, spacing and hierarchy of headings/sub-headings.

Language for the items may include:

- Preparing items in languages appropriate to the target markets, including the use of foreign language, where appropriate
- Using appropriate idioms and terminology for local and target markets
- Appropriate and selective use and/or explanation of industry terminology.

Prices to be stated in the items may include:

- Ensuring accuracy and comprehensiveness of all prices and charges
- Ensuring prices, tariffs are valid only until a stated date
- Ensuring a statement that prices and charges are subject to change without notification is included
- Including prices that are relevant to the specific target audiences of the brochures or marketing materials, including the need to list wholesale prices, commissions, available discounts for trade audiences but not for retail customers
- Ensuring the currency used in the items is relevant to the language being used and/or target market audiences or destinations
- Verifying with management that prices to be included in items are correct and acceptable
- Not releasing any items until pricing issues have been verified and approved by management.

	<p><i>Copy for the items</i> may include:</p> <ul style="list-style-type: none">• Determining the use of headings, headlines, headers and footers• Determining copy style including factual, imaginative, authoritative, whimsical, contemporary or emotional• Ensuring clarity of information provided• Identifying key messages and supplementary messages• Including special offers, incentives and/or competitions, as required• Incorporating the AIDA principle, grabbing Attention; appealing to self-Interest; arousing a Desire to buy; urging people to take Action• Personalising the message• Using specifics rather than generalisations• Using trigger words to encourage responses• Including maps in the items, where appropriate• Including messages from joint venture or sponsorship partners• Ensuring material is copyright free. <p><i>Provide resources</i> may include:</p> <ul style="list-style-type: none">• Supplying funding• Arranging for professional external assistance• Allocating sufficient and appropriate time• Organising for the inclusion of relevant internal expertise. <p><i>Proof read material</i> may include:</p> <ul style="list-style-type: none">• Checking to ensure materials do not give offence• Ensuring freedom from spelling, grammatical or typographical errors
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- Verifying the inclusion of all required information
- Checking that facts and figures contained in the item are accurate, current, relevant and comprehensive
- Ensuring there are no last-minute changes to the information contained within the items.

Circulate items for comment may include:

- Presenting material to management and partners to obtain their final comments
- Obtaining approval to proceed with the proposed items.

Meet and discuss the proposal with service providers may include:

- Graphic artists
- Graphic designers
- Printers
- Obtaining and evaluating samples of work done by potential service providers
- Selecting a service provider with previous relevant industry experience and a proven and successful history.

Detailed specifications may include:

- Defining the decisions relating to:
 - Quantities/volume required
 - Number of colours
 - Type of stock
 - Number of photographs
 - Layout and style of text
 - Production deadlines

	<ul style="list-style-type: none">• Presentation of draft sample• Determining terms and conditions of the contract that are acceptable and/or non-negotiable. <p><i>Obtain quotations</i> may include:</p> <ul style="list-style-type: none">• Ensuring quotations received accommodate the stated requirements of the specifications supplied• Ensuring quotations are received from a number of different service providers in keeping with internal requirements to obtain a variety of quotations prior to making a purchasing decision• Determining the finishing requirements that will apply to hard copy items including folding, trimming, stitching or stapling, as appropriate. <p><i>Evaluate quotations</i> may include:</p> <ul style="list-style-type: none">• Comparing quotations received from different service providers• Assessing quotations against identified criteria for the production of items as contained in the specifications supplied to potential service providers. <p><i>Monitor production activities</i> may include:</p> <ul style="list-style-type: none">• Liaising with suppliers to ensure specified targets and requirements are being met• Meeting with service providers on a regular basis to enable emerging issues to be highlighted and addressed• Responding to requests for information and/or direction• Making production decisions to move the project forward, including decisions regarding production variations that occur during the production phase.
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Proof read material that is produced as final items may include:

- Checking proofs for accuracy and compliance with initial draft
- Advising service providers of errors and/or changes that need to be made to proofs prior to final production
- Checking revised proofs, if required.

Authorise production may include:

- Signing off on proof to give authority for final production
- Making payment in accordance with agreed contractual conditions
- Filing documentation and communications between the organisation and service providers.

Check items supplied may include:

- Verifying final items match approved proofs
- Checking colour and print clarity
- Checking finishing that has been applied
- Checking quantities supplied
- Verifying distribution activities relating to items where these were agreed to as part of the production contract
- Authorising final payment for services rendered by service providers.

Assessment Guide

The following skills and knowledge must be assessed as part of this unit:

- Enterprise policies and procedures in regard to marketing, advertising and the production of materials that represent the organisation
- Principles of promotion and copy writing

- Knowledge of alternatives that exist in the development of brochures and marketing materials
- Understanding of the brochures and marketing materials used by the competition and elsewhere in the relevant industry sector
- Legislation that relates to fair trading, consumer protection, copyright and truth in advertising
- Ability to use coordination, project management and negotiation skills and techniques
- Knowledge of quality indicators that apply to materials produced
- General knowledge of the printing, graphic design and graphic artist industries
- Knowledge of factors that relate to production decisions including mailing costs, distribution costs, requirements by partners and associated promoters.

Linkages To Other Units

- Access and retrieve computer-based data
- Develop a marketing strategy and coordinate sales activities
- Establish and maintain a business relationship
- Produce documents, reports and worksheets on a computer
- Gather and present product information
- Prepare business documents
- Use common business tools and technology
- Lead and manage people
- Manage legal requirements for business compliance
- Monitor staff performance
- Provide professional support to business colleagues
- Develop and update tourism industry knowledge

- Promote products and services to customers
- Source and package tourism products and services
- Source and provide destination information and advice
- Create, implement and evaluate strategic product initiatives
- Develop, implement and evaluate sponsorship plans
- Develop, manage and evaluate local marketing strategies
- Promote tourism products and services
- Plan and implement sales activities
- Source and present information
- Lead and manage a development team
- Monitor workplace operations.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of host enterprise policies and procedures in regard to marketing, advertising and the production of materials that represent the organisation
- Demonstrated ability to identify the brochures and marketing materials required to support the attainment of organisational objectives in a defined context and develop effective and comprehensive action plans to guide the development of final items
- Demonstrated ability to oversee the development of a nominated draft item for presentation to a service provider, such as a printer, ensuring the material for inclusion is appropriate for the target audience, does not give offence, is legally compliant and is appropriate and acceptable in terms of content, accuracy, format, layout, language and copy writing style

- Demonstrated ability to undertake dealings with an internal or external service provider to submit a draft item for discussion, negotiate a contract for the delivery of services, obtain a nominated number of quotations for the job, proof read the material and give final approval for the production phase
- Demonstrated ability to oversee the production of nominated brochures and/or marketing materials including responding to production issues, checking the finished product and finalising payment and other internal and operational requirements.

Context of Assessment

Assessment must ensure:

- Actual or simulated workplace application of skills and knowledge to manage the development and production of actual brochures and marketing materials, including consultation and interaction with external service providers however, there is no necessity for the brochures and marketing materials to be produced by an external professional provider.

Resource Implications

Training and assessment must include identification of one or more real objectives for the brochures and marketing materials and interaction with real service providers, real internal staff with relevant expertise, where appropriate, real materials and a real industry context.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Observation of practical candidate performance
- Analysis of hard copy materials produced as part of the project including draft items, contracts, sample materials, action plans, proofs and final products
- Discussions with members of target audiences to identify the effectiveness of materials that have been produced
- Role plays
- Oral and written questions

<ul style="list-style-type: none"> • Third party reports completed by a supervisor • Project and assignment work. <p>Key Competencies in this Unit</p> <p><i>Level 1 = competence to undertake tasks effectively</i></p> <p><i>Level 2 = competence to manage tasks</i></p> <p><i>Level 3 = competence to use concepts for evaluating</i></p>		
Key Competencies	Level	Examples
Collecting, organising and analysing information	2	Validate information for inclusion in brochures and marketing materials
Communicating ideas and information	1	Share organisational requirements with development staff and external service providers
Planning and organising activities	2	Organise staff activities and the services of external service providers to produce brochures and marketing materials
Working with others and in teams	2	Assist colleagues and provide resources to develop copy, layout and content for draft items
Using mathematical ideas and techniques	3	Determine the acceptability of quotations received from service providers
Solving problems	2	Resolve copy, content and production issues
Using technology	2	Determine the technologies to be used in the production of brochures and marketing materials

Oral questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Coordinate production of brochures and marketing materials D2.TCS.CL5.06
Instructions	<ol style="list-style-type: none"> 1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	Response	
	PC	NYC
1. How do you determine factors that apply to the production of brochures and marketing materials you produce?	<input type="checkbox"/>	<input type="checkbox"/>
2. Give me an example of plans you have prepared for the production of brochures and marketing materials.	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
3. What detail/information do you include in action plans for the development of brochures and marketing materials?	<input type="checkbox"/>	<input type="checkbox"/>
4. What action have you undertaken to determine the target market/s for the production of a specific brochure/marketing material?	<input type="checkbox"/>	<input type="checkbox"/>
5. For the item referred to in your previous answer what was the content and why was it selected?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
6. For the item referred to in your previous answer what format and layout was used and why?	<input type="checkbox"/>	<input type="checkbox"/>
7. What factors do you take into account when deciding the language to use for a marketing item/brochure?	<input type="checkbox"/>	<input type="checkbox"/>
8. For a brochure/ marketing material, how do you determine the prices which will be listed?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
9. Tell me of the process you might follow to determine what copy will be included on a marketing brochure you are going to produce.	<input type="checkbox"/>	<input type="checkbox"/>
10. When seeking quotations for the production of marketing materials what resources do you provide to those from whom you are sourcing quotes?	<input type="checkbox"/>	<input type="checkbox"/>
11. How do you proof read materials provided to you by printers?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
12. How might you circulate a draft advertising/marketing document to others for their comment and feedback?	<input type="checkbox"/>	<input type="checkbox"/>
13. Give me an example of an instance where you have needed to revise draft copy after it has been proof read: why was the amendment necessary?	<input type="checkbox"/>	<input type="checkbox"/>
14. Tell me about an initial meeting you have had with a service provider who was asked to produce brochures/marketing materials for you: where did it take place? What was covered at the meeting? Who was there?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
15. Describe the detailed specifications you give to providers who will produce brochures/marketing materials for you.	<input type="checkbox"/>	<input type="checkbox"/>
16. How do you seek a quotation from providers for the production of brochures/marketing materials?	<input type="checkbox"/>	<input type="checkbox"/>
17. Give me an example of a situation where you have evaluated a quotation for the production of brochures/marketing materials: what did you consider/take into account?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
18. What is involved (apart from price) in finally selecting the provider who will print your brochures/marketing materials?	<input type="checkbox"/>	<input type="checkbox"/>
19. Tell me about monitoring production activities of a service provider you have chosen to print marketing items: what is involved in the process?	<input type="checkbox"/>	<input type="checkbox"/>
20. How do you follow up to ensure those who have produced materials are properly and fully paid? Why is this important?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
21. What alternate service providers do you know of to produce marketing materials? How can you identify others?	<input type="checkbox"/>	<input type="checkbox"/>
22. What is involved in authorising final production of marketing brochures/items?	<input type="checkbox"/>	<input type="checkbox"/>
23. How and why do you check the final work/production of those who supply you with marketing materials/brochures?	<input type="checkbox"/>	<input type="checkbox"/>

Written questions

Coordinate production of brochures and marketing materials – D2.TCS.CL5.06

Student Name: _____

Answer all the following questions and submit to your Trainer.

1. List four examples of brochures and marketing materials.

2. Identify four factors which need to be taken into account when considering new marketing materials to be produced.

3. Give four reasons the procedure of developing brochures and marketing materials is important.

4. List four keys in relation to planning.

5. Name four factors which can determine brochures/marketing materials which may need to be produced.

6. Present four reasons action plans are needed for each individual brochure/marketing item to be produced.

7. Name four considerations which have emerged as being relevant to the development of action plans for the production of brochures/marketing items.

8. Give four important points to bear in mind about targets for brochures/items.

9. How are demographic characteristics' used in relation to target markets?

10. Name four ways a staff member might identify the target markets for a business or for a nominated brochure/marketing items.

11. List four examples of **generic** marketing materials.

12. Name four examples of important/primary information that would be included on Conference programs, registration/advertorial forms and event prospectus.

13. Identify and describe the two possible uses/definitions of the word 'format' in relation to brochures.

14. Name four different types of fold which can be applied to brochures.

15. List four factors which can determine size, quality and colour of stock used for brochures.

16. What is identified in the notes as being 'essential' when brochures are to be produced using a foreign language?

17. Answer True or False to the following statement:

"It is standard practice to use local idiom and terms when producing brochures for foreign readers."

18. When is it acceptable to use jargon in marketing materials?

19. List four considerations which should be taken into account when including prices in any form of marketing materials.

20. What is the name of the internal document which governs requirements relating to printed material produced by the organisation? (Circle the correct answer)

- (a) Writing Directives
- (b) Style Guide
- (c) Project Brief
- (d) None of the above

21. In relation to brochures what is 'copy'?

22. List four common writing styles used in brochures.

23. What does the acronym 'AIDA' stand for in relation to the recognised marketing principle?

24. Answer True or False to the following statement: “In relation to writing copy for marketing brochures ‘less is more’”.

25. Name the four basic classifications of resources in relation to the production of marketing items.

26. In your own words define ‘proof reading’.

27. Name four things to check when proof reading.

28. Describe four keys to proof reading.

29. List four reasons to circulate draft marketing items for comment before they are sent for production.

30. Name four classifications of people to whom draft marketing materials may/should be circulated for comment.

31. Identify four keys/essentials when revising marketing materials in readiness for presentation to the printer/provider.

32. Give four examples of service providers who may be needed/involved in the preparation of marketing items.

33. Identify four important considerations when meeting and discussing development/production of marketing with service providers.

34. What is a quotation'?

35. List four items/topics which should be contained in specifications prepared for service providers in relation to marketing materials required by an organisation.

36. Explain four ways a business may ask a service provider/supplier for a quotation.

37. What does the acronym 'RFT' stand for?

38. Identify four activities involved in the generic term 'finishing' as this applies to marketing brochures.

39. What do the three As stand for in the triple-A approach to the evaluation of quotations?

40. Name four factors which are critical in the decision to select the successful tenderer for the production of marketing materials.

41. List four activities involved in accepting a tender/quotation.

42. What is the name of the document written out by the organisation and given to a provider which authorises them to provide the products/services listed on it?

43. List three key points to be observed when monitoring activities relating to the production of marketing items.

44. Give three reasons to ensure service providers are properly paid.

45. List three considerations which should be complied with when paying providers.

46. What is meant by a 'Plan B'?

47. What is a 'proof' and why do service providers forward them to organisations that have ordered marketing materials?

48. Name four activities that may be required in order to authorise production of required marketing materials from a provider.

49. List four activities which are necessary when checking marketing items supplied by service providers.

50. What are the three generic options for distributing marketing materials?

Answers to written questions

Coordinate production of brochures and marketing materials – D2.TCS.CL5.06

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

1. List four examples of brochures and marketing materials.

- Product and service brochures
- Destination guides
- Promotional flyers (or 'fliers') and leaflets
- Conference programs, registration/advertorial forms and event prospectus
- Display material
- Information kits
- Product support materials
- Advertising materials
- Direct mail items
- Invitations
- Merchandising goods.

2. Identify four factors which need to be taken into account when considering new marketing materials to be produced.

- Objectives
- Target market/s
- Required type and style of materials
- Time parameters
- Budget
- In-house production capabilities of the organisation
- Distribution of final materials/items.

3. Give four reasons the procedure of developing brochures and marketing materials is important.

- It is a complex activity
- It often involves the expenditure of substantial amounts of money
- There is frequently a need to liaise with numerous other business/stakeholders to coordinate the final/finished product
- The end product is an essential sales tool for the organisation and the revenue of the business rely on these items to a significant extent
- What is produced must be correct – there is no room for errors or omissions
- All items must reflect the image, standards and reputation the organisation wants to portray for the specific item for a given target market.

4. List four keys in relation to planning.

- Planned action always stands a much higher chance of success than unplanned action
- Planning underpins coordination – and developing these items demands coordination with many other people and organisations
- Plans need to be in writing – so others can see them and they can be shared with others for their information, comment, feedback and for them to follow
- 'If you fail to plan, you plan to fail'
- All plans which are developed need to be flexible – plans need to be 'set in jelly and not in concrete'.

5. Name four factors which can determine brochures/marketing materials which may need to be produced.

- Level of stock on hand
- Time of the year
- Age/currency of brochures and other materials
- Level of brochures and materials present in agencies and other outlets where brochures and materials are normally available
- Available alternatives
- Special promotions or campaigns being undertaken
- Extent of organisational participation in exhibitions to promote the business
- Extent of sales presentations scheduled for the future.

6. Present four reasons action plans are needed for each individual brochure/marketing item to be produced.

- The needs of each item (content, prices, information, dates, times) are usually different
- The factors (budget, timelines, quantities required) impacting each item vary
- Individual plans enable better control and optimise the likelihood of a more effective/successful outcome
- Different items are often produced by different external providers – so a plan for each product facilitates more effective management of the process for each item
- This allows better tracking of progress
- It enables more efficient management of resources for each item
- This approach supports better evaluation of outcomes.

7. Name four considerations which have emerged as being relevant to the development of action plans for the production of brochures/marketing items.

- Identifying, detailing and clarifying individual steps to be undertaken in the development and production phases
- Allocating resources to the development and production phases
- Identifying individual responsibilities
- Specifying parameters for the plan
- Incorporating relevant data
- Communicating the contents of action plans.

8. Give four important points to bear in mind about targets for brochures/items.

- There is no limit to the type/nature of targets
- A brochure/marketing item may be targeted at one or more than one market/target
- The anticipated/expected outcome for the item need to correspond to what is produced and to align with the target (market) the item is aimed at
- Market research data should guide/govern production
- Target markets for are likely to change over time as the organisation grows, expand their business, introduce new products/services.

9. How are demographic characteristics' used in relation to target markets?

They are used alone or in combination to describe and define the different categories/classifications of target markets.

10. Name four ways a staff member might identify the target markets for a business or for a nominated brochure/marketing items.

- Talking to management – to get their input
- Talking with relevant stakeholders – to obtain their comment and to coordinate and align organisational items with items they may be producing
- Referring to relevant plans – to identify the targets as described in those documents which will indicate the direction the business wants to take in this regard
- Analysing market research data – to identify emerging markets and to refresh knowledge regarding changing and/or ongoing requirements as they apply to existing/established markets.

11. List four examples of generic marketing materials.

- Travel bags
- T-shirts
- Key rings
- Pens
- Luggage tags
- Give-away merchandising items
- Any item intended for the mass market.

12. Name four examples of important/primary information that would be included on Conference programs, registration/advertorial forms and event prospectus

- 'This event is sponsored by XYZ' or a similar statement of support for the event/conference
- Name of the organisation
- Brief description/overview of the services provided
- Street address/es
- Telephone number/s
- Web site.

13. Identify and describe the two possible uses/definitions of the word 'format' in relation to brochures.

- First – it can mean the underlying basis of the item.

For example, advertising/promotional/marketing material can come in several formats – it can be:

- Paper-based (such as brochures, flyer, mail-outs, newspaper and magazine adverts and hard copy schedules, price lists and itineraries)
 - Electronic – such as SMS texts, websites, Facebook posts, blogs or tweets
 - Merchandise – such as travel bags, caps and T-shirts.
- Second – it can refer to the formatting of a page.

This includes the layout of the page (that is the physical position of items on a page) but also includes several other features of what appears on the page such as:

- Fonts which are used
- Choice of font sizes
- Whether photographs are used or whether pictures/graphics are used
- Selection and use of colour.

14. Name four different types of fold which can be applied to brochures.

- Half-fold/bi-fold
- Tri-fold
- Accordion fold
- Z-fold
- Accordion fold
- Quarter fold
- Gate fold.

15. List four factors which can determine size, quality and colour of stock used for brochures.

- Demands/requirements of those who are going to display the item – see above
- Type of product/item being developed – for example, there are certain higher expectations of quality for a brochure that do not exist for a flyer
- Overall ‘look’ to be achieved by the item
- Traditional/non-negotiable requirements of the organisation and stakeholders involved in the initiative
- Budget
- End-use of the finished product – if the item is to be used by staff inside the business or at another organisation/agency then the emphasis must be on practicality and ‘useability’ of the item rather than ‘show and appearance’
- The theme of the product/service – there needs to be a resonance between what is being promoted (in terms of quality, value, reliability and other emotional criteria/factors) and the way it is promoted.

16. What is identified in the notes as being ‘essential’ when brochures are to be produced using a foreign language?

Where a foreign language is used it is ESSENTIAL a person whose mother tongue is that language is employed to proof read and amend the draft version of the item before it is approved for final printing in order to avoid unintended linguistic gaffs.

17. Answer True or False to the following statement:

“It is standard practice to use local idiom and terms when producing brochures for foreign readers.”

False.

18. When is it acceptable to use jargon in marketing materials?

When materials are developed for internal consumption/use by organisational staff, partners and/or industry personnel who will know what it means.

19. List four considerations which should be taken into account when including prices in any form of marketing materials.

- Ensure the accuracy of prices quoted
- Ensure prices listed are comprehensive
- Ensure time limitations for stated prices
- Determine organisational requirements regarding need to include a statement highlighting prices and charges are subject to change without notification
- Incorporate prices relevant to the specific target audiences of the brochures or marketing materials
- Ensure the currency used in the items is relevant to the language being used and/or target market audiences or destinations
- Highlight the value-for-money represented by the price being charged
- Verify with management prices to be included in items are correct.

20. What is the name of the internal document which governs requirements relating to printed material produced by the organisation? (Circle the correct answer)

(b) Style Guide.

21. In relation to brochures what is 'copy'?

The words/content of the brochure.

22. List four common writing styles used in brochures.

- Factual
- Imaginative
- Authoritative
- Whimsical
- Contemporary
- Emotional.

23. What does the acronym 'AIDA' stand for in relation to the recognised marketing principle?

- A = grabs Attention
- I = appeals to the peoples' self-Interest
- D = arouses the Desire to buy
- A = urges people to take Action

24. Answer True or False to the following statement: “In relation to writing copy for marketing brochures ‘less is more’”.

True.

25. Name the four basic classifications of resources in relation to the production of marketing items.

- Funding/financial resources
- Physical resources
- Staff/human resources
- Information.

26. In your own words define ‘proof reading’.

Proof-reading is checking the material to ensure everything is ‘right’.

27. Name four things to check when proof reading.

- Grammatical errors
- Spelling mistakes
- Typographical errors
- Omissions (things left out)
- Language used
- Inaccuracies
- Mistakes
- Flow
- Readability
- Clarity.
- Prices
- Figures/numbers
- Addresses, telephone numbers, and email addresses
- Names of people to contact
- Check to ensure materials do not give unintended offence
- Verify the inclusion of all required information.

28. Describe four keys to proof reading.

- Allocate time for it
- Do it more than once
- Leave time between readings
- Get more than one person to do it
- Have someone who has not been involved in the development process read the materials
- If funding allows, use the services of a professional proof reader and editor.

29. List four reasons to circulate draft marketing items for comment before they are sent for production.

- Keep management informed and up-to-date
- Give those who were involved in the development process an opportunity to check what has been produced
- Get input from those who have not been involved in development process
- Add another dimension for Proof reading, Fact checking and Identification of errors and omissions.

30. Name four classifications of people to whom draft marketing materials may/should be circulated for comment.

- Management
- Business and strategic partners
- Agencies and sub-branches
- Intermediaries who will be involved in promoting/selling the product/service being featured
- Sales staff within the organisation
- Accounts and financial department.

31. Identify four keys/essentials when revising marketing materials in readiness for presentation to the printer/provider.

- There should be a face-to-face meeting of the stakeholders
- Everyone should have an opportunity to present their case for change
- No idea/suggestion should be ignored
- Revisions must be based on a legitimate reason to do so
- Agreed suggestions for revisions need to be undertaken, circulated and considered in the same way the original item was
- There can be a need to revise the revisions
- The final approved version needs to be signed off by management.

32. Give four examples of service providers who may be needed/involved in the preparation of marketing items.

- Graphic artists
- Graphic designers
- Printers
- Stock/paper suppliers
- Colourists/colour coordinators
- Image makers/consultants
- Brand strategists
- Brand managers.

33. Identify four important considerations when meeting and discussing development/production of marketing with service providers.

- Schedule sufficient time for this stage of the operation
- Make sure the organisation has clearly and fully explained to the other party exactly what it wants to achieve
- Involve relevant others from the organisation in the discussions
- Obtain samples of previous work done by potential providers
- Evaluate the samples/previous work done by the potential suppliers
- Develop a personal relationship/rapport with the businesses.

34. What is a quotation'?

A quotation (or 'quote') is an estimated cost provided by the supplier for the items ordered.

35. List four items/topics which should be contained in specifications prepared for service providers in relation to marketing materials required by an organisation.

- Quantity required
- Size and weight of finished brochure
- Type or weight of paper to be used
- Number of colours
- Number of photographs
- Layout and style of text
- Whether brochure is to be printed on one or both sides
- Number of pages
- Requirement for proofs to be forwarded
- How the original material is going to be provided to the printer/producer
- Additional requirements required for the job
- Deadline for delivery of proofs
- Deadline for delivery of finished product
- Budget limitations/parameters
- Delivery location/s for drafts/proofs and finished products.
- Terms and conditions.

36. Explain four ways a business may ask a service provider/supplier for a quotation.

- A formal letter requesting a quote
- An email
- An informal telephone call
- An in-person face-to-face request
- RFT.

37. What does the acronym 'RFT' stand for?

Request For Tender.

38. Identify four activities involved in the generic term 'finishing' as this applies to marketing brochures.

- Folding
- Trimming
- Stitching
- Stapling.

39. What do the three As stand for in the triple-A approach to the evaluation of quotations?

- Acknowledging
- Assessing
- Accepting.

40. Name four factors which are critical in the decision to select the successful tenderer for the production of marketing materials.

- Quality of the finished product
- Ability of the tenderer to deliver the product by the required timeline
- Cost
- Terms and conditions
- Capacity of the business to provide any identified additional work (such as finishing, distribution, securing access to displays or gaining exposure to target markets).

41. List four activities involved in accepting a tender/quotation.

- Consensus agreement among selection team
- Notifying the successful tenderer about the decision which has been made
- Communicating the decision to others
- Advising the unsuccessful tenderers
- Paying a deposit
- Finalising last-minute issues.

42. What is the name of the document written out by the organisation and given to a provider which authorises them to provide the products/services listed on it?

Purchase Order.

43. List three key points to be observed when monitoring activities relating to the production of marketing items.

- Never ignore problems
- Respond promptly – to questions and issues raised by the printer
- Keep providers on their toes.

44. Give three reasons to ensure service providers are properly paid.

- If the organisation wants to deal with them again it has to have developed a reputation as a 'good payer'
- If they are not paid they will tell other providers/printers about the situation
- If they are not paid they may/will take legal action to recover the money they are owed.

45. List three considerations which should be complied with when paying providers.

- Pay on or before the agreed date
- Pay the amount specified
- Pay in the manner specified/agreed to.

46. What is meant by a 'Plan B'?

An alternative plan.

47. What is a 'proof' and why do service providers forward them to organisations that have ordered marketing materials?

- Sample/draft of the work to be produced/printed
- Provided so organisations can check/verify/make necessary changes.

48. Name four activities that may be required in order to authorise production of required marketing materials from a provider.

- Check revised proofs if this was required
- Organise additional changes
- Obtain official authorisation from designated management to proceed
- Sign-off on a document provided by the printer/producer
- Confirm certain details
- Make an agreed payment
- Note any communication pertinent to requirements for changes
- File all documentation.

49. List four activities which are necessary when checking marketing items supplied by service providers.

- Use a team to do the checking – as opposed to doing the job alone.
- Compare the finished product/s to the specifications and the approved proof/s
- Check the quality of the final product
- Check colours used match what was required/agreed
- Check there is no 'colour bleed'
- Check print clarity
- Check required finishing has been applied
- Check the quantities supplied
- Confirm the paperwork for the job is correct
- Authorise final payment.

50. What are the three generic options for distributing marketing materials?

- The organisation distributes items themselves – this means the organisation maintains sole control over the process but also has sole responsibility for organising the work to be done.
 - The printer/producer distributes them for an additional charge – according to a distribution schedule provided by the organisation
 - Use a different business to handle distribution – such as a distribution house, distributor or courier service.
-

Observation checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Coordinate production of brochures and marketing materials D2.TCS.CL5.06
Dates of observation	
Instructions	<ol style="list-style-type: none"> 1. Over a period of time observe the student completing each of the following tasks: <ol style="list-style-type: none"> a) Identify the context for brochures and marketing materials b) Manage inclusions for brochures and marketing materials c) Administer activities relating to the production of draft items d) Obtain quotations for production of brochures and marketing materials e) Administer activities relating to the production of final items 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	Yes	No
Element 1: Identify the context for brochures and marketing materials		
Determine the factors that apply to the production of brochures and marketing materials	<input type="checkbox"/>	<input type="checkbox"/>
Plan the production of items	<input type="checkbox"/>	<input type="checkbox"/>
Develop action plans for individual brochures and marketing materials	<input type="checkbox"/>	<input type="checkbox"/>
Element 2: Manage inclusions for brochures and marketing materials		
Determine the target(s) for the items	<input type="checkbox"/>	<input type="checkbox"/>
Determine the content for the items	<input type="checkbox"/>	<input type="checkbox"/>
Determine format and layout for the items	<input type="checkbox"/>	<input type="checkbox"/>

Did the candidate	Yes	No
Determine language for the items	<input type="checkbox"/>	<input type="checkbox"/>
Determine the prices to be stated in the items	<input type="checkbox"/>	<input type="checkbox"/>
Determine the copy for the items	<input type="checkbox"/>	<input type="checkbox"/>
Element 3: Administer activities relating to the production of draft items		
Provide resources for the production of draft items	<input type="checkbox"/>	<input type="checkbox"/>
Proof read material	<input type="checkbox"/>	<input type="checkbox"/>
Circulate items for comment and feedback	<input type="checkbox"/>	<input type="checkbox"/>
Revise brochures and marketing materials	<input type="checkbox"/>	<input type="checkbox"/>
Element 4: Obtain quotations for production of brochures and marketing materials		
Meet and discuss the proposal with service providers	<input type="checkbox"/>	<input type="checkbox"/>
Provide detailed specifications as the basis for obtaining a quotation for work to be done	<input type="checkbox"/>	<input type="checkbox"/>
Obtain quotations from a range of service providers	<input type="checkbox"/>	<input type="checkbox"/>
Evaluate quotations received to make a purchasing decision	<input type="checkbox"/>	<input type="checkbox"/>
Select the service provider(s) to supply services and lodge official order	<input type="checkbox"/>	<input type="checkbox"/>
Element 5: Administer activities relating to the production of final items		
Monitor production activities undertaken by selected service providers	<input type="checkbox"/>	<input type="checkbox"/>
Ensure payment to service providers, as agreed	<input type="checkbox"/>	<input type="checkbox"/>
Identify and use alternative service providers where production timelines are not being met	<input type="checkbox"/>	<input type="checkbox"/>
Proof read material that is produced as final items for approval prior to full production	<input type="checkbox"/>	<input type="checkbox"/>
Authorise production of final items	<input type="checkbox"/>	<input type="checkbox"/>
Check items supplied by service providers as final items	<input type="checkbox"/>	<input type="checkbox"/>
Did the student's overall performance meet the standard?	<input type="checkbox"/>	<input type="checkbox"/>

Feedback to student and trainer/assessor			
Strengths:			
Improvements needed:			
General comments:			
Candidate signature		Date	
Assessor signature		Date	

Third Party Statement

Student name:			
Name of third party:		Contact no:	
Relationship to student:	<input type="checkbox"/> Employer <input type="checkbox"/> Supervisor <input type="checkbox"/> Colleague <input type="checkbox"/> Other <i>Please specify: _____</i> <i>Please do not complete the form if you are a relative, close friend or have a conflict of interest]</i>		
Unit of competency:	Coordinate production of brochures and marketing materials D2.TCS.CL5.06		
<p>The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.</p> <p>Please answer these questions as a record of their performance while working with you. Thank you for your time.</p>			
Do you believe the trainee has demonstrated the following skills? <i>(tick the correct response]</i>	Yes	No	Not sure
Determines requirements and plans production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies target markets and material content for same	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Determines format/layout and content of items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oversees the production process including proof reading of materials and completion of necessary revisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discusses production requirements with suppliers supplying them with detailed specifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Obtains quotations for work, negotiates contracts and selects appropriate provider	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administers and completes activities related to the production and acceptance of final items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments/feedback from Third Party to Trainer/Assessor:

--

Third party signature:

Date:

Send to:

Competency recording sheet

Name of Student		
Name of Assessor/s		
Unit of Competency	Coordinate production of brochures and marketing materials	D2.TCS.CL5.06
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Identify the context for brochures and marketing materials						
Determine the factors that apply to the production of brochures and marketing materials						
Plan the production of items						
Develop action plans for individual brochures and marketing materials						
Element 2: Manage inclusions for brochures and marketing materials						
Determine the target(s) for the items						
Determine the content for the items						
Determine format and layout for the items						
Determine language for the items						
Determine the prices to be stated in the items						
Determine the copy for the items						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 3: Administer activities relating to the production of draft items						
Provide resources for the production of draft items						
Proof read material						
Circulate items for comment and feedback						
Revise brochures and marketing materials						
Element 4: Obtain quotations for production of brochures and marketing materials						
Meet and discuss the proposal with service providers						
Provide detailed specifications as the basis for obtaining a quotation for work to be done						
Obtain quotations from a range of service providers						
Evaluate quotations received to make a purchasing decision						
Select the service provider(s) to supply services and lodge official order						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 5: Administer activities relating to the production of final items						
Monitor production activities undertaken by selected service providers						
Ensure payment to service providers, as agreed						
Identify and use alternative service providers where production timelines are not being met						
Proof read material that is produced as final items for approval prior to full production						
Authorise production of final items						
Check items supplied by service providers as final items						
Candidate signature:			Date:			
Assessor signature:			Date:			

William
Angliss
Institute | Specialist centre
for foods, tourism
& hospitality



**Australian
Aid** 