

No. 103

8 February 2008

**SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)**

In accordance with Regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Marketing

registered by Organising Field 03 – Business, Commerce and Management, publishes the following Qualification for public comment.

This notice contains the title, field, sub-field, NQF level, credits, and purpose of the Qualification. The full Qualification can be accessed via the SAQA web-site at www.saqqa.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, SAQA House, 1067 Arcadia Street, Hatfield, Pretoria.

Comment on the Qualification should reach SAQA at the address below and **no later than 7 March 2008**. All correspondence should be marked **Standards Setting – Marketing** and addressed to

The Director: Standards Setting and Development
SAQA

Attention: Mr. D. Mphuthing

Postnet Suite 248

Private Bag X06

Waterkloof

0145

or faxed to 012 – 431-5144

e-mail: dmphuthing@saqa.org.za

DR. S. BHIKHA

DIRECTOR: STANDARDS SETTING AND DEVELOPMENT



SOUTH AFRICAN QUALIFICATIONS AUTHORITY

QUALIFICATION:
Certificate: Chartered Marketing

SAQA QUAL ID	QUALIFICATION TITLE		
60429	Certificate: Chartered Marketing		
ORIGINATOR	PROVIDER		
SGB Marketing			
QUALIFICATION TYPE	FIELD	SUBFIELD	
Professional Qualification	3 - Business, Commerce and Management Studies	Marketing	
ABET BAND	MINIMUM CREDITS	NQF LEVEL	QUAL CLASS
Undefined	120	Level 7	Regular-ELOAC

This qualification does not replace any other qualification and is not replaced by another qualification.

PURPOSE AND RATIONALE OF THE QUALIFICATION

Purpose:

The purpose of this qualification is to formalize the criteria against which a professional marketer will be certified in order to be awarded the designation "CM (SA)".

A qualifying learner will be able to:

- Apply a range of financial and/or statistical formulas to plan and measure the results of strategic marketing efforts.
- Plan, prepare, and present high level proposals to role players and stakeholders.
- Integrate all aspects of marketing in meeting the broad objectives of the organisation and ensure that marketing strategies and activities are integrated and co-ordinated with those of other key parts of the organisation.
- Demonstrate that strategic marketing efforts contribute directly towards the bottom line of the organisation.
- Demonstrate professional conduct to ensure sound strategic marketing practices.
- Conduct research into global and/or national marketing practices and use findings to add value the organisation.

Learners qualifying with this qualification also need to subscribe to a code of professional conduct and to ensure that they are affiliated with the body that safeguards the integrity of the code.

Rationale:

This qualification allows learners to qualify as Chartered Marketers in South Africa through the evaluation of their competence at a senior level against standards that have been determined through consultation with the industry.

The definition of a profession is that of an occupation based on a unique scientific body of knowledge, whose practitioners have a service orientation as well as autonomy in the performance of their work. The specialised knowledge for this qualification is acquired through a

formal education process, and the practical skills and experience are obtained through real-time work experience in a formal, recognized mentoring environment. The structured workplace experience also serves to instil the ethical standards essential to any profession.

Marketers who are professionals at this level have either qualified with a formal qualification at NQF Level 7 or have extensive experience, knowledge and skills as professionals in their field. This qualification does not aim at reassessing their knowledge, but, rather takes the assessment to another level in that the applied competence of professionals is evaluated against a set of criteria determined by the marketing industry.

Marketing is about gathering and using confidential information on customers to raise awareness of products and/or services through complex and strategic marketing interventions in a way that leads to the customer investing (and re-investing) in the product and/or services.

Professionalism when gathering and using this information must be supported by the protection of customers from exploitation and abuse by unethical marketers. On the other hand, marketers need to be equipped with the applied, vocational knowledge and skills required to navigate marketing transactions and relationships through the complex South African and global legislative framework.

Successful senior marketing professionals in South Africa need to build their credibility as industry leaders through the continuous enhancing of their skills as well as highlighting their accomplishments. Although individuals might have demonstrated their expertise throughout their career, this qualification offers a concrete measure of their experience and their command of marketing concepts and processes at a strategic and complex level.

RECOGNIZE PREVIOUS LEARNING?

Y

LEARNING ASSUMED IN PLACE

It is assumed that a learner wishing to complete this professional qualification will be competent to:

- Analyse and evaluate global trends and develop a vision for an organization.
- Develop a monitoring system and evaluate and monitor a strategic marketing plan.
- Monitor and control all aspects of an internal or external marketing unit.
- Interpret a brief and develop a public relations and marketing campaign.
- Develop, plan and review alternative marketing opportunities.
- Assess current marketing culture and set marketing culture and ethics objectives to instil a marketing culture and ethics in all stakeholder groups.
- Create and maintain a positive culture of customer service in the supply chain and conceptualise innovative customer service strategies.

Learners also need to be competent in their area of specialisation against the minimum criteria as stated below for each:

Marketing Communications:

- Develop, assess and write research policies and sponsor research activities for market research projects.
- Develop an integrated Marketing Communications strategy and global Marketing Communications strategy.
- Manage specialized areas in Marketing Communications and the Marketing Communications strategies.

Customer Management:

- Develop, assess and write research policies and sponsor research activities for market research projects.
- Design and develop customer acquisition and retention strategies and manage specialized areas in Customer Management processes to meet corporate business objectives.
- Set sales procedures and policies for the organization and develop and monitor annual sales plans and objectives.

Marketing Management:

- Develop, assess and write research policies and sponsor research activities for market research projects.
- Set marketing policy to meet business strategic plan and co-ordinate position and synergize the strategic marketing plan.
- Manage specialized areas in Marketing Management.

Market Research:

- Develop, assess and write research policies and sponsor research activities for market research projects.
- Develop and integrate all aspects of marketing research programmes and manage specialized areas in marketing research to meet corporate business objectives.

Recognition of Prior Learning:

It is assumed that the learner has already been deemed competent at NQF Level 7. Should this not be the case (because it is recognised that successful, senior marketing managers, directors and industry champions do not necessarily have a formal, NQF registered qualification) then the RPL of the NQF Level 7 competences could be integrated into the final summative assessment used to award this professional qualification.

This qualification is aimed at assessing applied knowledge and requires evidence of professional competence through evidence generated in the workplace, over a period of time. Candidates can therefore not be RPL's against this qualification, as this is THE form of assessment used to judge a learner as competent or not.

Access to the Qualification:

The professional marketer wanting to access this qualification should be competent in literacy and numeracy at NQF Level 6 or equivalent. Learners will also need to have a deep understanding of the different specialized activities within marketing that include, but are not limited to, marketing communications, marketing management, customer management, market research and direct marketing.

QUALIFICATION RULES

N/A

EXIT LEVEL OUTCOMES

1. Apply a range of financial and/or statistical formulas to plan and measure the results of strategic marketing efforts.
2. Plan, prepare, and present high level proposals to role players and stakeholders.
3. Integrate all aspects of marketing in meeting the broad objectives of the organisation and ensure that marketing strategies and activities are integrated and co-ordinated with those of other key parts of the organisation.

4. Demonstrate that strategic marketing efforts contribute directly towards the bottom line of the organisation.

5. Demonstrate professional conduct to ensure sound strategic marketing practices.

6. Conduct research into global and/or national marketing practices and use findings to add value to the organisation.

ASSOCIATED ASSESSMENT CRITERIA

Associated Assessment Criteria for Exit Level Outcome 1:

1.1 Financial and/or statistical formulas are applied as an integral component of the marketing effort.

1.2 Financial and/or statistical formulas are used for planning and measuring performance and/or benchmarking and/or comparison against best practice.

Associated Assessment Criteria for Exit Level Outcome 2:

2.1 Objectives of proposal and presentation are identified.

2.2 Appropriate role players and stakeholders are identified.

2.3 Proposal documents are drawn up to be clearly structured, detailed, yet concise and to meet accepted technical, legal and linguistic standards.

2.4 Presentations are prepared and given using appropriate audio-visual tools.

2.5 Presentation is well structured, compelling and presents a convincing argument in favour of the proposal.

Associated Assessment Criteria for Exit Level Outcome 3:

3.1 Rigorous critical and analytical thinking is applied at a strategic level in the organisation.

3.2 "Buy in" is secured from marketing team and other functions and, if necessary, capacity is built within marketing and other functions to ensure marketing's integration throughout the business.

● Range:

○ "Marketing" includes marketing management, marketing research, customer relationship management, marketing communications, brand management, and direct marketing.

○ "Other key parts of the organisation" include other divisions or departments or functions relevant to the strategy at hand, including but not limited to finance, human resources, manufacturing, procurement, research & development, etc.

Associated Assessment Criteria for Exit Level Outcome 4:

4.1 Strategic marketing efforts initiated and managed by the candidate are drawn up and designed to contribute to the profits of the organisation.

4.2 Evidence is collated using key financial indicators over a period of time to indicate the contribution of the marketing strategy to the organisation's bottom line.

Associated Assessment Criteria for Exit Level Outcome 5:

5.1 Appropriate referee reports are gathered and used to show that the marketer demonstrates professional conduct by adhering to the relevant internal and/or external codes of conduct.

5.2 Interactions with employer, employees and customers of the business reflect a consistent adherence to the professional code of conduct.

Associated Assessment Criteria for Exit Level Outcome 6:

- 6.1 Research is conducted into global or national best practice and applied in the SA context.
- 6.2 Research is initiated by defining the problem, setting the research parameters and directly or indirectly briefing the research team.
- 6.3 Evidence of personal decision-making (or contribution to top management decision-making) based on the research is shown.

Integrated Assessment:

Various methods of assessment will need to be integrated into the assessment strategy in order to ensure validity, authenticity, reliability, differentiability and currency of the evidence provided by the learner. The assessment will therefore need to cover all the exit level outcomes and ensure that a portfolio of evidence is one of the components used to assess the learner's competence.

INTERNATIONAL COMPARABILITY

The research on other countries across the globe that certify the professional competence of marketers included the United States of America, the United Kingdom, Canada, the Netherlands and Australia. A summary of what is offered and how it compares to this qualification is presented below.

United States of America:

The American Marketing Association offers the Professional Certified Marketer (PCM) designation to their professional members. The process includes the passing of a comprehensive exam that covers the key areas of marketing. The emphasis is on testing knowledge as well as applied competence gained through experience on the job, as senior marketing manager or director.

Qualified PCM's must maintain their status through continuing professional marketing education and growth and need to complete 36 hours of continuing education activities every three years. The activities include attending seminars, belonging to and serving on a marketing association committee, writing articles, and any other activities that contribute to professional growth and to the industry as a whole.

United Kingdom:

The Chartered Institute of Marketing (CIM) awards the "Chartered marketer" designation. To gain this designation, the professional marketer is required to complete 35 hours of CPD annually for a minimum of two consecutive years; submit the completed card together with the relevant supporting evidence to the CIM.

Once qualified, CM's are required to participate in an annual 35 hours of CPD. However, only 10% of all CM's will be requested each year to make the submission.

Canada:

Two Canadian professional organisations were considered when researching the international comparability of this qualification, namely the Canadian Marketing Association and the Canadian Institute of Marketing.

- The Canadian Institute of Marketing (CIM):

Eight classes of membership exist for this institute. The three that equate to the content of this qualification are:

- Registered Professional Marketer (RPM): Qualifying professionals are required to be a professional member of the institute, have successfully completed the writing of a case study that confirms professional competency, understand the Institute's code of professional ethics, pay their registration fee.
- Professional Member (MCInst.M): Professionals wishing to qualify need to have acquired 5 years experience in a marketing position, the last two at a senior management level, need to have one of the following qualifications: Diploma of an Institute Marketing, BA, MA or PhD with marketing specialisation, diploma or university post-graduate diploma in Management Studies or Business Administration with marketing specialisation, other educational or professional qualification with marketing input.
- Associate Member (ACInst.M): 3 years working experience in a marketing position the last at some level of management, qualifications include sales training managers, area, divisional or assistant managers of marketing and/or sales and similar marketing experience, also qualified are full time lecturers in marketing at a college or university with three years business or consulting experience; any one of the following qualifications: Certification from an institute of marketing, BA or MA in a business related subject with a marketing component, diploma or university post-graduate diploma in Business administration of Management Studies, other educational or professional qualifications approved by the CIM or one of its affiliated institutes overseas.
- Canadian Marketing Association (CMA):

This organisation does not have professional designations that are awarded to marketers. However the CMA does offer various training programmes that contribute toward professional development.

The Netherlands:

The NIMA is a marketing platform for professional marketers in the Netherlands and stimulates marketers to develop and to increase their professionalism in the field of marketing.

To this end, the NIMA recognises the Registered Marketers or RMs. Very little detail was available on the requirements for the awarding of this status, or the process to be followed to maintain the status.

Australia:

The Australian Marketing Institute certifies professional marketers as "Certified Practising Marketers" or CPM's. It is the recognition of both formal education and successful application of the marketers knowledge and skills. To qualify the marketer needs to have a minimum of 5 years practical marketing management experience, a recognised marketing qualification or 10 years marketing management experience or practice. They must also have extensive marketing knowledge and background experience. A minimum of 650 points needs to be accumulated across the three different areas of educational qualifications, practising experience and professional achievements.

The assessment criteria include:

- Education qualifications: Marketing degree or post graduate diploma in marketing.
- Practising experience: Minimum of 5 years broad marketing experience.
- Professional achievement: Provision of a resume of their professional achievements must be submitted with their application.

Qualified CPM's need to maintain their status by undertaking a minimum of 100 CPD hours over a 3 year period.

ARTICULATION OPTIONS

The designation awarded through successful completion of this route to professional recognition is the highest form of professional recognition available at present in South Africa for marketers at NQF Level 7. The nature of this qualification does not allow access to higher forms of traditional learning such as a doctorate. Rather this designation instrument provides the future employer assurance of the professional competence of the marketing professional. It also enhances the credibility and credentials of professional marketers wanting to set themselves apart in the market place.

MODERATION OPTIONS

- Moderators responsible for the moderation of this qualification must be registered with the relevant ETQA and therefore meet their requirements for the registration of constituent moderators at NQF Level 7.
- The moderators must therefore have a minimum of 5 years experience at management level in marketing, an NQF Level 8 qualification in Marketing or equivalent and should be a practicing CM (SA).
- The moderators used to quality assure this process must subscribe to the relevant Code of Professional Conduct for Chartered Marketers.
- A professional marketer that is found guilty of misconduct under this code will not be able to perform the moderating function for the awarding of this qualification.

CRITERIA FOR THE REGISTRATION OF ASSESSORS

Assessors wanting to assess learners against this qualification must be registered as constituent assessors with the relevant ETQA and must be qualified and current Chartered Marketer (SA)'s.

NOTES

N/A

UNIT STANDARDS

This qualification is not based on Unit Standards.

LEARNING PROGRAMMES RECORDED AGAINST THIS QUALIFICATION

None