

<b>Title</b>	<b>Establish, manage, and maintain customer data for direct marketing</b>		
<b>Level</b>	<b>4</b>	<b>Credits</b>	<b>5</b>

<b>Purpose</b>	<p>This unit standard is for people who seek to offer, or provide advice on, direct marketing services.</p> <p>People credited with this unit standard are able to: identify and explain principles and applications of direct marketing data; and manage a direct marketing database.</p>
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<b>Classification</b>	Marketing > Direct Marketing
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<b>Available grade</b>	Achieved
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**Guidance Information**

- 1 Performance of outcomes of this unit standard will require adherence to the New Zealand Marketing Association Codes of Practice, or equivalent codes: <http://www.marketing.org.nz/>.
- 2 Assessment guidance  
Assessment will be based on candidate management of data for a minimum of fifty customers.
- 3 *Data* is an organised collection of comprehensive information about individual existing or prospective customers including geographic, demographic, psychographic, and behavioural information. Data can be managed in a formatted spreadsheet, or in a large purpose-built database.
- 4 References  
Kotler, P. & Armstrong, G. *Principles of Marketing*. Prentice Hall: Various international editions.  
Lamb, C.W., Hair, J.F., McDaniel, C., Summers, J., & Gardiner M. (2009) *MKTG*, (1st Asia Pacific Ed.). Cengage Learning: Australia.
- 5 Legislation relevant to this unit standard includes but is not limited to the:  
Commerce Act 1986  
Consumer Guarantees Act 1993  
Fair Trading Act 1986  
Privacy Act 1993  
Sale of Goods Act 1908  
Unsolicited Electronic Messages Act 2007.

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## Outcomes and performance criteria

### Outcome 1

Identify and explain principles and applications of direct marketing data.

#### Performance criteria

- 1.1 Principles and applications of direct marketing data are identified and explained in relation to collection, analysis, selection, and use of database information.
- 1.2 Data requirements for direct marketing are identified in terms of accuracy, simplicity, comprehensiveness, relevance, and flexibility.

### Outcome 2

Manage customer data for direct marketing.

#### Performance criteria

- 2.1 Provisions of privacy legislation and codes of ethics are identified in relation to the establishment and use of direct marketing databases.
- 2.2 Objectives are established for the collection, retrieval and maintenance of direct marketing data.
- 2.3 Information needs are identified and processes are developed for the selection and analysis of data relevant to the direct marketing activity.
- 2.4 Processes are established to collect feedback from customers and relevant external data to improve the quality of direct marketing data.  
  
Range processes may include but are not limited to – questionnaires, lists, sales data, accounts data, returns, sales force input, telemarketing input, internet, social media.
- 2.5 Data are retrieved and information is provided in accordance with organisational requirements and information needs.

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**This unit standard is expiring. Assessment against the standard must take place by the last date for assessment set out below.**

**Status information and last date for assessment for superseded versions**

Process	Version	Date	Last Date for Assessment
Registration	1	24 September 1997	31 December 2016
Revision	2	16 January 2001	31 December 2016
Review	3	19 November 2010	31 December 2016
Rollover and Revision	4	16 April 2015	31 December 2022
Review	5	12 December 2019	31 December 2022

**Consent and Moderation Requirements (CMR) reference**

0113

This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.