

<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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### Explanatory notes

- 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 evidence requirements

### Outcome 1

Identify and explain principles and applications of direct marketing data.

#### Evidence requirements

- 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.

#### Evidence requirements

- 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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<b>Planned review date</b>	31 December 2019
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**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	N/A

<b>Consent and Moderation Requirements (CMR) reference</b>	0113
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

**Please note**

Providers must be granted consent to assess against standards (accredited) by NZQA, before they can report credits from assessment against unit standards or deliver courses of study leading to that assessment.

Industry Training Organisations must be granted consent to assess against standards by NZQA before they can register credits from assessment against unit standards.

Providers and Industry Training Organisations, which have been granted consent and which are assessing against unit standards must engage with the moderation system that applies to those standards.

Requirements for consent to assess and an outline of the moderation system that applies to this standard are outlined in the Consent and Moderation Requirements (CMR). The CMR also includes useful information about special requirements for organisations wishing to develop education and training programmes, such as minimum qualifications for tutors and assessors, and special resource requirements.

**Comments on this unit standard**

Please contact NZQA National Qualifications Services [nqs@nzqa.govt.nz](mailto:nqs@nzqa.govt.nz) if you wish to suggest changes to the content of this unit standard.