

**Magill College Pty Ltd Trading as Magill College Sydney**

ABN: 67 090 050 990

CRICOS Provider Code: 01994M RTO No: 91367

Tel: (+61 2) 8061 6980 Fax: (+61 2) 9267 1711 [www.magill.edu.au](http://www.magill.edu.au)**BSB52415 – Diploma of Marketing and Communication****Record of Assessment Outcome**

<b>Unit of Competency:</b>	<b>BSBMKG515 – Conduct a marketing audit</b>		
<b>Student Name:</b>			
<b>Student ID Number:</b>			
<b>Assessor Name:</b>			
<b>Term and Year:</b>			
<b>The student has successfully completed the following assessment task(s):</b>		<b>Yes</b>	<b>No</b>
Assessment 1	Project	<input type="checkbox"/>	<input type="checkbox"/>
Assessment 2	Case Study	<input type="checkbox"/>	<input type="checkbox"/>
Assessment 3	Portfolio of Activities	<input type="checkbox"/>	<input type="checkbox"/>
<b>Overall, the student was assessed as:</b>			
<b>Competent</b> <input type="checkbox"/>		<b>Not Yet Competent</b> <input type="checkbox"/>	
<b>Did the student meet the criteria for the following elements of competency?</b>		<b>Yes</b>	<b>No</b>
1. Prepare for marketing audit		<input type="checkbox"/>	<input type="checkbox"/>
2. Identify form of marketing audit		<input type="checkbox"/>	<input type="checkbox"/>
3. Conduct external marketing audit		<input type="checkbox"/>	<input type="checkbox"/>
4. Conduct internal marketing (self) audit		<input type="checkbox"/>	<input type="checkbox"/>
5. Prepare marketing audit report		<input type="checkbox"/>	<input type="checkbox"/>
<b>The student requires the following skill(s) development before re-assessment:</b>			
<b>Feedback to student on overall performance during assessment:</b>			
<b>The student has been provided with feedback and informed of the assessment result and the reasons for the decision.</b>			
<b>Assessor Name:</b>			
<b>Assessor Signature:</b>		<b>Date:</b>	
<b>I have been provided with feedback on the evidence I have provided. I have been informed of the assessment result and the reasons for the decision.</b>			
<b>Student Name:</b>			
<b>Student Signature:</b>		<b>Date:</b>	

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# **BSB52415 – Diploma of Marketing and Communication**

## **BSBMKG515 – Conduct a marketing audit**

### **Assessment 1 – Project**

Submission Details				
Student ID Number:				
Student Name:				
Assessor Name:				
Due date:				
Student Declaration:	By signing this declaration, I certify that: <ul style="list-style-type: none"><li>• The assessment work is my own work;</li><li>• All sources and materials have been acknowledged where required;</li><li>• I have not copied or plagiarized in any way materials of another person or work of a fellow student and referenced all sources of information.</li></ul>			
Student Signature:				
Assessment Result Details				
Result:	Satisfactory		Not Satisfactory	
Feedback to Student:				
Student Declaration:	I have been provided with feedback on my assessment performance/result from Magill College Sydney assessor.			
Student Signature:				
Assessor Signature:				
Date:				



## Submission details

The assessment task is due on the date specified by your assessor. Any variations to this arrangement must be approved in writing by your assessor.

Submit this document with any required evidence attached. See specifications below for details.

## Performance objective

For this task, you will demonstrate skills and knowledge required to prepare for marketing audit.

## Assessment description

In this assessment task, you are required to prepare for a marketing audit by developing a plan outlining how an internal and external audit can be conducted within the case study organisation. You will need to review the case study business's marketing plan provided with this assessment task, and describe a plan that outlines the scope, approaches, and timelines for the audits. You will need to clearly identify the type of marketing audit and format to be used in conducting the audit and collecting information.

## Procedure

1. Using the case study information provided by your assessor, complete the following steps to provide a summary plan to prepare for a marketing audit.  
Describe:
  - a. the purpose of the marketing audit, including details about micro and macro factors that may affect the marketing operations and strategic goals and refer to the marketing plan
  - b. the scope of the marketing audit that is required
  - c. the methodology required to be used in conducting the audit and when the audit could occur for the organisation
  - d. timeframes for audit in line with the marketing plan
  - e. the participants to be involved in the conduct of the audit and what their involvement would require (their role)
  - f. the main characteristics of the marketing audit and how they meet the audit priorities for the organisation
  - g. the format of the marketing audit, and the main elements to be included
  - h. the form of marketing audit that best meets the requirements of the marketing plan. Describe at least one other form and explain briefly why it is not appropriate.
2. Provide a few written dot points for each of Steps a–h above.



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3. Submit your marketing audit summary plan within the timeframe and format agreed with your assessor.

## **Specifications**

You must submit:

- A completed marketing audit summary plan.

Your assessor will be looking for the following foundation skills:

- Reading skills to identify and evaluate complex textual information and analyse the marketing activities of the case study organisation
- Workplace planning skills to develop plans and use effective time management and organisational skills to complete tasks with an awareness of how they may contribute to longer-term operational and strategic goals.

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# **BSB52415 – Diploma of Marketing and Communication**

## **BSBMKG515 – Conduct a marketing audit**

### **Assessment 2 – Case Study**

Submission Details				
Student ID Number:				
Student Name:				
Assessor Name:				
Due date:				
Student Declaration:	By signing this declaration, I certify that: <ul style="list-style-type: none"><li>• The assessment work is my own work;</li><li>• All sources and materials have been acknowledged where required;</li><li>• I have not copied or plagiarized in any way materials of another person or work of a fellow student and referenced all sources of information.</li></ul>			
Student Signature:				
Assessment Result Details				
Result:	Satisfactory		Not Satisfactory	
Feedback to Student:				
Student Declaration:	I have been provided with feedback on my assessment performance/result from Magill College Sydney assessor.			
Student Signature:				
Assessor Signature:				
Date:				



## Submission details

The assessment task is due on the date specified by your assessor. Any variations to this arrangement must be approved in writing by your assessor.

Submit this document with any required evidence attached. See specifications below for details.

## Performance objective

You will demonstrate the skills and knowledge required to conduct an internal and external marketing audit.

## Assessment description

Using the plan for the organisation developed in Assessment Task 1 and the Marketing Plan included with Assessment Task 1, you will identify relevant criteria for internal and external marketing audits, conduct the audits, and collate the information collected in light of the audit requirements. You will also participate in a role-play to demonstrate communication skills to gathering information in the context of interviewing or conducting focus groups.

Ensure you keep the data you have collected to prepare an audit report in Assessment Task 3.

## Procedure

1. Read the case study information provided with this task and use it to write a short description about preparing to conduct your marketing audit.
  - a. Determine criteria to be used in external audit, such as market characteristics, customer needs, and competitor factors.
  - b. Determine both qualitative and quantitative factors to be used in the external marketing audit, including:
    - i. economic factors
    - ii. demographic factors
    - iii. technological factors
    - iv. political/legal factors.
  - c. Determine criteria to be used in internal audit, such as:
    - i. existing research data; internal sales data; supply chain management and logistics
    - ii. functional efficiency and internal interface with the organisation
    - iii. marketing systems in terms of marketing information, planning and control
    - iv. profitability and cost effectiveness.





- d. Determine a methodology for collecting data in accordance with plans for audit developed in Assessment Task 1 and relevant to the criteria and factors determined in Steps 2–4. Include a number of methods for collecting both quantitative and qualitative data relevant to internal and external audit, including interviews and digital searches.
  - i. Determine how you will conduct online searches using search terms, advanced search features such as operators, and <url> addresses.
  - ii. Include in your methods qualitative data gathering in the form of an interview or focus group research in the case study organisation.
2. Write a short description of your methodology as determined above for submission to your assessor.
3. Arrange with your assessor to role-play an interview or focus group. Your assessor will arrange for others to play the parts of employees or stakeholders of the case study organisation.
4. Prepare interview questions, or focus questions to be put to a focus group.
5. Conduct the role-play to gather relevant data. Ensure you use appropriate verbal and non-verbal communication skills to interact with participants in the roleplay and gather data.
6. Compile your qualitative and quantitative data in an appropriate format, such as a spreadsheet, following your methodology.
  - a. Ensure you label quantitative or qualitative data as satisfying internal or external criteria.
  - b. Provide evidence of basic calculations relevant to effectiveness of external marketing or revenue gains, for example.
7. Submit your methodology and data to your assessor within the agreed timeframe and in the agreed format.

## Specifications

You must submit:

- Submit:
  - A description of your methodology
  - A portfolio of data, labelled appropriately
- Participate in a role-play to gather information through interviewing or conducting focus groups.

Your assessor will be looking for the following foundation skills:



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- Numeracy skills to interpret numerical data and make basic calculations to audit external marketing, quantify data and determine financial gains
- Oral communication skills to participate in verbal exchanges using appropriate language and non-verbal features
- Workplace internal and external auditing skills to:
  - gather information and identify and evaluate several choices against a set of criteria
  - recognise and use a range of relevant digital language and symbols, such as search terms and operators



## **Appendix 1 – Case study: Made Marketing and Sarto's Gourmet Pasta**

Ready-Made Marketing has engaged you to conduct a marketing audit on their client, Sarto's Gourmet Pasta.

### **Excerpt from letter of appointment**

- You are to use various methodologies to obtain the widest possible view of Sarto's marketing operations, including interviews with the key participants.

### **Excerpt from meeting with Rose Ready of Ready-Made Marketing**

Rose stressed that they were looking for a variety of methodologies to be used in the marketing audit, including one-on-one interviews with the key participants, use of customer focus groups that she could facilitate, and research of data available for market research firms and government agencies.

You met with the owner of Ready-Made Marketing, Rose Ready, who explained that their client had agreed to the marketing audit but wanted an external person like you to conduct it so that all points of view could be canvassed from an independent perspective to minimise the chance for subjectivity.

When you asked for an opinion why she thought that the client had not achieved the objectives, Rose replied that there was no one big issue, but that many little factors had a cumulative effect on the overall result.

You wanted to understand the micro-environmental factors affecting Sarto's, including buyer and consumer behaviour, competition and market demand, and so asked Rose a series of questions.

She spoke for a while about Ready-Made Marketing's role with the owner Mario Sarto and the fact that he made all the decisions relating to marketing, and mostly without any consultation with them. Rose accepted the position but felt that it was not always in the best interests of Sarto's business or its customers. For instance, Mario had rejected the idea of converting the take-away ordering system to new internet-based technology. Her own experience was that the staff, while being very competent cooks, were not skilled in telephone sales anyway.

Rose was particularly disappointed that Mario did not take up the offer to engage a freelance PR specialist that she had introduced to him after Mario's friends at *Bmag* left the magazine. Which meant there was no write up of the business at all for the entire first year.

Rose indicated that Mario believed that all the business needed was the delivery of regular flyers in local letterboxes but, according to Rose, the feedback from the surveys showed that the majority of customers thought that flyers were mostly junk mail anyway.

Rose had hoped to get information from the accountant about marketing costs but that just did not happen.



### Meeting with Mario Sarto and the accountant

Mario was happy to meet with you to discuss the business and marketing performance of Sarto's Gourmet Pasta and invited his accountant, Eric Yeung, to the meeting to help with answering some of the financial questions.

When asked for an overview of the performance of the business, Mario explained that it has been very difficult from the start. He spoke about the fact that the government had not built the 'Park & Ride' parking area as planned and had stopped the project for another year. Mario said this had a big impact on people having access to the restaurant at night.

Mario also explained that Stella's, one of his local competitors, had built a large 30-seat outdoor eating area and that it seemed to be full every time he went past. Also one of the franchise chains, Pasta Bite, had opened up in the adjacent suburb, giving the local customers greater options.

All this new activity had put pressure on sales, which lead Mario to drop prices on pasta products. The accountant confirmed what Mario had said with the statement that pasta Gross Profit % was only 45%. Mario explained that his strategy to deal with the slow sales was to make the flyers more single product promotion rather than promoting the band and the assortment offer. As far as Mario was concerned, advertising and promotion should be directed at getting next week's sales and nothing more.

When Mario spoke about the flyer, Eric said that there had been a huge increase in flyer unit costs. He believed it was the short print runs and the use of high gloss and full colour that was causing it. Mario explained that he needed the high gloss to show his pasta to the best advantage and short print runs because he was offering different 'specials' every week. Eric then said that according to the figures, it was the take away business that was really growing, not the family groups and family group specials that Mario was targeting with his advertising in *Bmag*. It seemed that these family sit-down specials were bringing down the profitability of the business.

Eric explained that he received all the financial information about the business in preparation for Sarto's tax returns. He then produced the actual sales for 2016, which showed the following.

Segment	Budget – 2016	Actual – 2016
<i>Individual</i>	\$120,000	\$121,000
<i>Take away</i>	\$180,000	\$203,000
<i>Family</i>	\$150,000	\$112,000
<b>Total</b>	<b>\$450,000</b>	<b>\$436,000</b>



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When you asked about new product development and forecasting sales, Mario said that it was too expensive to get market research done and so just used the accountant's tax figures and his own 'gut feeling' to determine the sales forecast.

Mario's response to your question about charging different prices for deliveries was to say that it just good business to charge the rich folk that lived in the gated estate more because they could afford it.

### **Meeting with Adriana Como**

Adriana was in charge of the sales and promotions for Sarto's but worked as a supervisor in the kitchen as well. You asked her about issues she was facing in terms of the sales and marketing operations.

She admitted that her skills and qualifications were more in kitchen management than sales, but Mario had asked her to carry out this function. She said one of the biggest problems was that the phone ordering system was constructed in the kitchen, next to the cook with the most responsibility to compile and check every meal. She said it created real logistics problems in dealing with take-away orders.

When you asked about new product development, she explained that new products were developed based on Mario's assessment of how exotic the new product was or how easy it was to make. Mario felt that testing new products by giving them away was too costly and counterproductive to increasing sales.

In a comment about accessing research data, she explained that there was plenty of research available in the Restaurant Association's monthly magazine, but Mario just left that magazine in the lunch room for staff and never consulted it.

Another issue was that there was no real coordination between the timing of the promotional flyers and preparation in-store in terms of having sufficient stock purchases. Mario and the printer would create a new weekly specials flyer, and sometimes the first Adriana knew about it was when a customer would present the flyer when ordering.

### **Research reports**

In trying to understand the macro factors affecting Sarto's Gourmet Pasta, you researched the following reports to obtain findings on the demographic, economic, ethical, geographic, political/legal, social/cultural, technological influences. You looked through the research reports that Rose Ready had given you to discover the following.

#### **Australian Bureau of Statistics (ABS)**

- ABS statistics on age distribution – Findings are the same as the marketing plan.
- ABS statistics on growth rates – Findings: Growth in young families with a government incentive on new births and an increase in retirees.
- ABS statistics on regional distribution of the population – Findings: Increasing in the Graceville area but were mostly retirees.
- ABS statistics on the population size – 130,000.



### **Australian Treasury report**

- Treasury's current interest rates – Findings: Rising incrementally throughout the year.
- Treasury's current levels of credit availability – Findings: Tightening on credit card limits.
- Treasury's current unemployment levels – Findings: Unemployment falling due to more opportunities created by mothers leaving the workforce.

### **IBSA World – Market research 2016**

- IBSA World industry report on strategies adopted by each of the major competitors – Findings: Expansion by the chains into interstate markets – Price war created due to reducing sales and fight for market share.
- IBSA World industry report material shortages – Findings: Drought conditions in most states sees local produce from Queensland being sent to Sydney creating a local shortage.
- IBSA World industry report on market demand – Findings: Steady.
- IBSA World industry report evolving needs and satisfactions being sought by the buyers in this market – Findings: Growing need for healthy options like salads, and more information on ingredients.
- IBSA World industry report substitutes for this product – Findings: Supermarkets introducing a range of pre-packaged 'heat & eat' pasta products.
- Household Income survey – Findings: Steady, no change.
- Political and legal – Findings: Employees working longer with emphasis on economic growth. New legislation relating to labelling on take-away products delivered to consumers.

### **Focus group**

You organised a focus group from the local community and from some of Sarto's regular customers. The following consensus was reached among the participants.

- Customers want convenience products and more healthy options.
- Take-away and eat-at-home was the preferred dining option rather than sit-down.
- Pasta products should be designed to be low fat. Tomato-based sauces preferred over cream-based sauces.
- Customers want to order via the internet and not be stressed out by the phone system with its delays and difficult to understand accents and noise.
- Customers prefer fewer flyers, which they saw as 'junk mail', and flyers should be more informative about ingredients and offer a full menu.



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- Some customers questioned the ethics of Sarto's Gourmet Pasta, who charged more for delivery into the neighbouring 'gated estate' than to every other home delivery customer.
- Comment: 'They may be great cooks, but they don't know how to handle telephone sales'.

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# **BSB52415 – Diploma of Marketing and Communication**

## **BSBMKG515 – Conduct a marketing audit**

### **Assessment 3 – Portfolio of Activities**

Submission Details				
<b>Student ID Number:</b>				
<b>Student Name:</b>				
<b>Assessor Name:</b>				
<b>Due date:</b>				
<b>Student Declaration:</b>	By signing this declaration, I certify that: <ul style="list-style-type: none"><li>• The assessment work is my own work;</li><li>• All sources and materials have been acknowledged where required;</li><li>• I have not copied or plagiarized in any way materials of another person or work of a fellow student and referenced all sources of information.</li></ul>			
<b>Student Signature:</b>				
Assessment Result Details				
<b>Result:</b>	<b>Satisfactory</b>		<b>Not Satisfactory</b>	
<b>Feedback to Student:</b>				
<b>Student Declaration:</b>	I have been provided with feedback on my assessment performance/result from Magill College Sydney assessor.			
<b>Student Signature:</b>				
<b>Assessor Signature:</b>				
<b>Date:</b>				



## Submission details

The assessment task is due on the date specified by your assessor. Any variations to this arrangement must be approved in writing by your assessor.

Submit this document with any required evidence attached. See specifications below for details.

## Performance objective

You will demonstrate the skills and knowledge essential to preparing written marketing audit reports and presenting outcomes to stakeholders. You will then require to demonstrate knowledge of relevant legislation, practices and underpinning knowledge requirements relevant to conducting marketing audits.

## Assessment description

For this assessment you are required to assess and analyse the information you gathered in Assessment Task 2 and present a report describing and auditing the marketing activities of the case study organisation.

Using the report format specified, prepare a marketing audit report for the case study organisation you have completed internal and external audit of. You will need to refer to the data you gathered and collated and evaluate the marketing plan and the organisation's performance against it, looking for problem areas and areas of opportunity to improve the organisation's marketing.

You will also need to answer range of questions about the marketing audit process and factors.

## Procedure

### Part A

1. Read the case study information provided with this task.
2. Using that information, write a marketing audit report, ensuring you complete the following:
  - a. Present the information as required by the case study.
  - b. Include reference to relevant quantitative and qualitative data you gathered in Assessment Task 2.
  - c. Compare marketing plan assumptions and targets against the data you gathered in the audit conducted in Assessment Task 2. Compare goals and objectives with performance data.
  - d. Make at least two recommendations for improving marketing performance.
3. Arrange a time and place with your assessor to present a summary of your report to an organisational or stakeholder audience.



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4. Present your report. Ensure you use appropriate oral communication skills to engage with your audience and build professional confidence in your role as a marketing professional. Make sure you keep the organisation's marketing goals firmly in mind.
5. Submit your written report and presentation notes to your assessor within the agreed timeframe and in the agreed format.

### Part B

1. Review the written question provided
2. Provide written responses to the questions in Appendix 2
3. Submit your responses within the agreed timeframe and the agreed format.

### Specifications

You must submit:

- Submit:
  - A written marketing audit report
  - Presentation notes
- Deliver presentation to a stakeholder audience on the report.
- Written responses to all questions

Your assessor will be looking for the following foundation skills:

- Writing skills to use clear, accurate and relevant language to organise and record information using suitable organisational formats
- Oral communication skills to participate in verbal exchanges using appropriate language and non-verbal features
- Workplace navigation skills to adhere to organisational policies and objectives, in consideration of own role for its contribution to broader goals of work environment
- Workplace marketing audit reporting skills to:
  - Ensure reporting is reflective of and meets the needs of the marketing plan, including marketing goals and objectives
  - Make at least two recommendations for improvement of marketing performance where relevant.
- Workplace navigation skills to adhere to organisational policies and objectives, including legislative compliance



## **Appendix 1 – Case Study: Ready-Made Marketing and Sarto's Gourmet Pasta**

Ready-Made Marketing has engaged you to conduct a marketing audit on their client, Sarto's Gourmet Pasta.

### **Excerpt from letter of appointment**

- a. You are to map your findings to the headings and assumptions contained in the document 'Marketing Plan – Sarto's Gourmet Pastas – December 2016' to identify problem areas and opportunities. Address both the implementation of strategies and the appropriateness and relevance of the strategies and objectives themselves, given the data gathered in the audit.
- b. The audit is to make findings in relation to the marketing plan, culminating in a report that compares the marketing plan assumptions with actual findings. It is expected that the report will follow the outline of the marketing plan.
- c. The body of the report will include the following sections:
  - Situation Analysis
  - Marketing Strategy
  - Financials, Budgets, and Forecasts
  - Controls.
- d. With the above sections of the marketing plan in mind, it will be important to identify problem areas and opportunities for Sarto's and to recommend a plan of action to improve marketing performance, particularly in a changing technological and digital communications environment. Ensure you make at least two recommendations for improvement of marketing performance where relevant.



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### Appendix 2 – Questions

1. What are the elements of the marketing planning process

2. Describe the impact of government regulations or legislative requirements and how they could impact on the process of conducting a marketing audit:

3. What is the difference between a business plan and a marketing plan?



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4. List three common primary data collection techniques and give a brief description of each.

5. Identify at least two forms of marketing audit

6. Explain the purposes of a marketing audit and the benefit to a business



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7. Explain, in your own words, the following four characteristics of a marketing audit:
- Comprehensive
  - Systematic
  - Independent
  - Periodic

8. Describe at least three major elements of a marketing audit, including their format.

9. How are the environmental factors that affect the business classified, and what is the difference between micro-environmental factors?



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10. List and describe two external environmental factors.

11. Describe how SWOT analysis can be used in the context of an internal audit?