

Trainer Manual & Assessment

Develop Organisational
Marketing Objectives

BSBMKG608

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Develop Organisational Marketing Objectives

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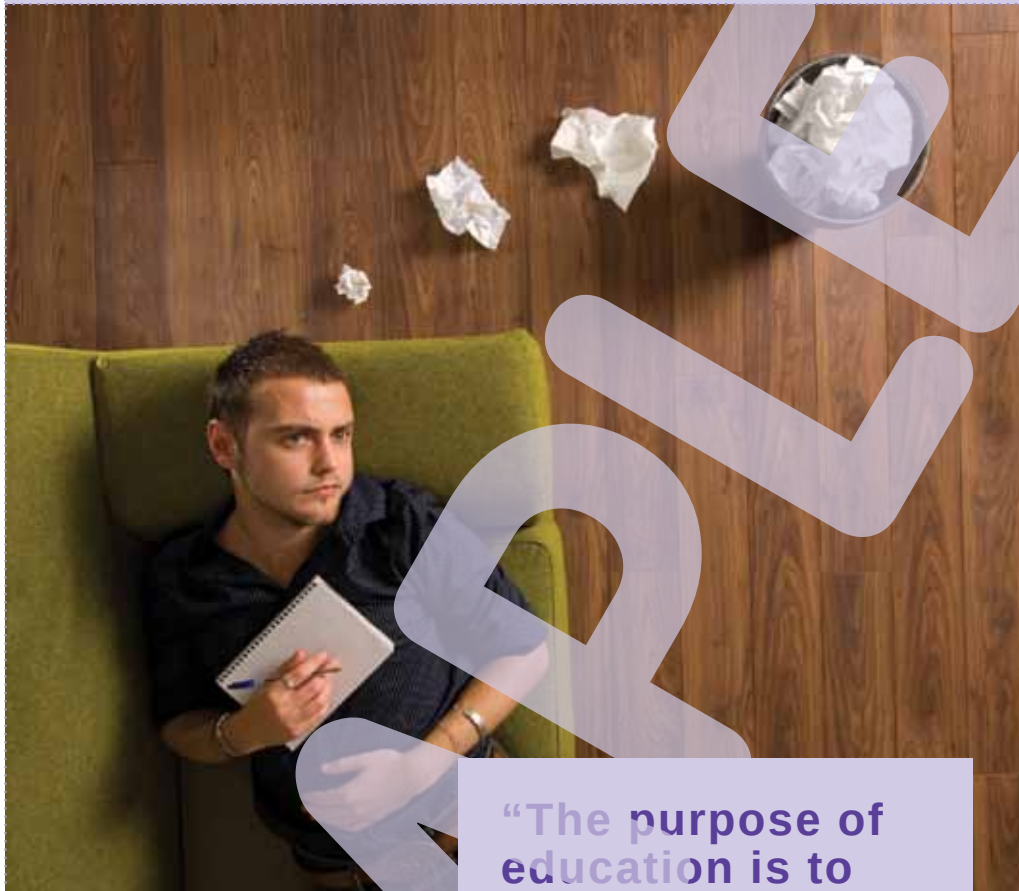
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About BSB Business Services Training Package



“The purpose of education is to replace an empty mind with an open one.” Malcolm Forbes

About the Business Services Industry

The BSB Business Services Training Package covers a diverse range of industries and occupations. Business Services covers a range of cross-industry functions and services supporting the commercial activities of all industries.

Defining Qualifications

When units of competency are grouped into combinations that meet workplace roles, they are called qualifications. These qualifications are aligned to the Australian Qualifications Framework (AQF). Each qualification will have 'packaging rules' which establish the number of core units, number and source of elective units and overall requirements for delivering the qualification.

Delivery and Assessment of Qualifications

RTOs must have the qualifications (or specific units of competency) on their scope to deliver nationally recognised training and assessment. RTOs are governed by and must comply with the requirements established by applicable national frameworks and standards. RTOs must ensure that training and assessment complies with the relevant standards.

Qualification Training Pathways

A pathway is the route or course of action taken to get to a destination. A training pathway is the learning required to attain the competencies to achieve career goals. Everyone has different needs and goals, and therefore requires a personalised and individual training pathway.

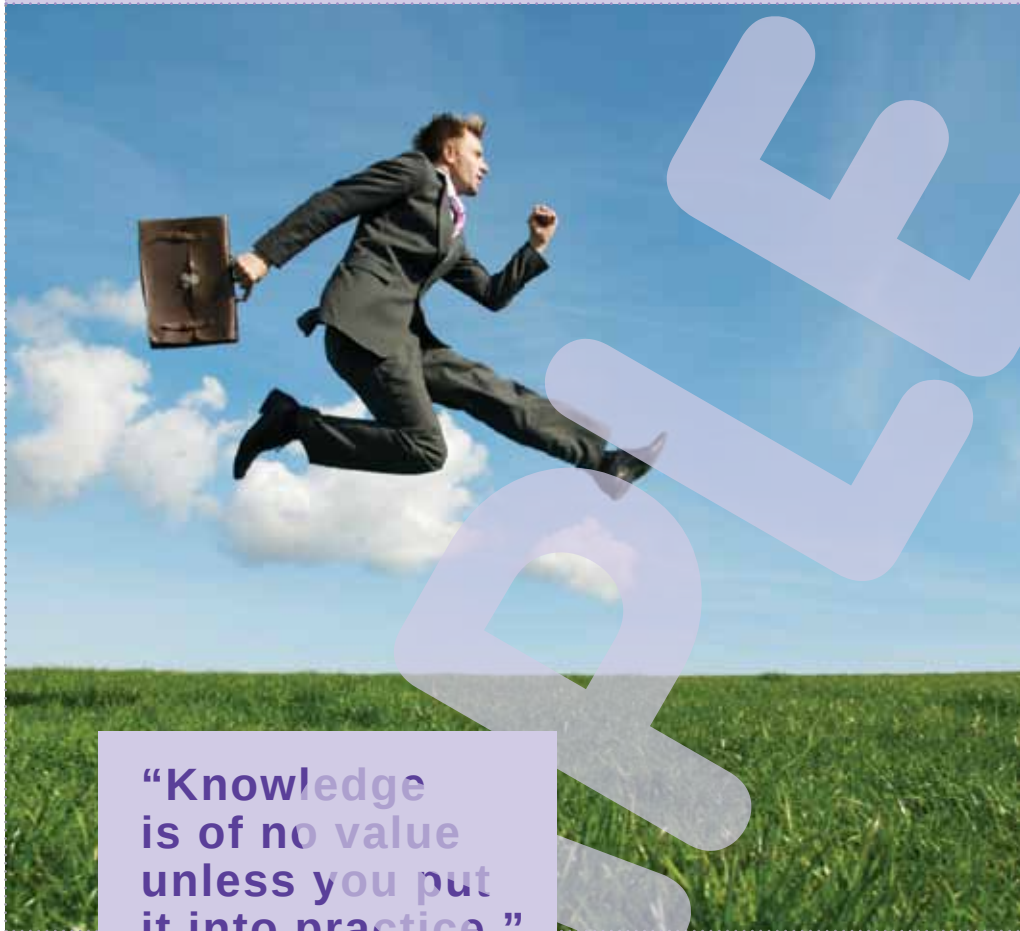
Foundation Skills

Foundation Skills are the non-technical skills that support the individual's participation in the workplace, in the community and in education and training.

Australian Core Skills Framework (ACSF)

This Assessment meets the five ACSF core skills as described in the Foundation Skills mapping.

Introduction



“Knowledge is of no value unless you put it into practice.”

Anton Chekhov

This unit standard, BSBMKG608 Develop Organisational Marketing Objectives is about being able to conduct a strategic analysis to develop organisational marketing objectives. This involves reviewing the organisation’s internal and external environments, evaluating past and current marketing performance, and exploring and evaluating new marketing opportunities. It is provided to meet the requirements.

This manual is broken up into four Elements. They are:

- 1. Identify Strategic Direction**
- 2. Review Marketing Performance**
- 3. Scope Marketing Opportunities**
- 4. Formulate Marketing Objectives**

At the conclusion of this training you will be asked to complete an Assessment Pack for this unit of competency. The information contained in this resource will assist you to complete this task.

You will then have demonstrated your ability to develop organisational marketing objectives.

This unit contributes to the attainment of National Certificates.



ELEMENT 1: Identify Strategic Direction



Performance Criteria Element 1

- 1.1 Confirm organisation's mission, vision, purpose and values from current organisational materials or from owners, directors or senior management
- 1.2 Analyse strategic organisational documents to identify organisational directions and targets
- 1.3 Complete a situational analysis identifying factors impacting the direction and performance of the business
- 1.4 Identify legal and ethical requirements for the organisation
- 1.5 Document and confirm strategic direction of the organisation with owners, directors or senior management, and identify its impact on marketing activities

Identify Strategic Direction

Planning the Journey

Where Do We Want to Be?

The vision, mission, and values of any organisation are the guiding light of the strategic planning. They are the light by which organisations set their course and align their priorities. Well-written vision, mission, and values statements signal to the world your intent and direction. They allow employees the freedom to put their own mark on the implementation, which is essential to motivated execution and good governance.

The mission statement describes the overall purpose of the organisation. It states what the organisation does, who it is done for, how it is done, and why it is done. The mission is the starting point in developing a strategic vision and establishes the boundaries for the organisation's current activities.

The vision statement describes the ideal future and reflects the essence of the organisation's mission and values. It unites the organisation in a common, clearly understood strategic direction and addresses how the organisation wants to impact on society. It conveys the 'bigger picture' of the purpose of the organisation so that employees see themselves as builders of a mansion rather than just laying stones.

The values reflect the core ideology of an organisation, the deeply held values that do not change over time, and answer the question "How do we carry out our mission?". They must be the values that your organisation lives by, not the ones that it would be nice to have.

Analyse Strategic Documents to Identify Targets

Once you know the mission, vision, and values of the organisation, you are in a position to start to analyse them to work out the strategic direction that they indicate should be taken. If the strategic planning was done well, the plan provides a useful focus that energises and moves the organisation toward its mission goals, plus it provides a document to recruit others to the mission.

Once you have established an understanding of the meaning and intent of these documents, it is time to confirm that you are clear and that they do in fact still represent the organisation in an honest way.

This should be done in conjunction with the guardians of the strategic direction – the senior management team. This team may include a Board of Directors, Chief Executive Officer, and other Senior Managers who are Heads of Department. It must be those who have the authority to change the mission, vision, and values. These are the individuals who probably established them in the first place. If they have not been reviewed in a while, they may welcome the opportunity to conduct this analysis.

The strategic organisational documents that may be useful here include:

- Annual reports
- Codes of practice
- Organisational policy
- Customer service charter
- Security and privacy policies
- Strategic marketing plans
- Strategic plans.

You should be able to access all of these, however if you have difficulty, speak with your manager; they may be able to help.

As you conduct your analysis, consider the following in relation to the mission, vision, and values. Do they:

- Clearly define your customers?
- Identify the markets your business operates in?
- Identify the importance of technology?
- Seem concerned for survival, growth, and profitability?
- State your economic objectives?
- Describe your beliefs, aspirations, and values?
- Identify your competitive strengths?
- Include a concern for public image, social community, and environment?
- Outline the importance of your employees?

When the strategic plan is developed, it should not simply be a 'laundry list' of what is currently underway. At least 20% should be new ideas. If there is not a steady stream of new initiatives, then the strategic plan will be more like treading water.

Understanding this, the planning stages conducted before the actual strategic planning should include creative and innovative thinking. Ideas should be explored without constraint using creative tools such as brainstorming or nominal group technique. The new ideas must then be explored, refined, and aligned with the organisational purposes and objectives.

To stimulate the ideas, you could pose questions such as:

- What are the trends being observed in our industry or business sector?
- Referring to these trends, what are three ideas that could be added to our best products or services?
- Understanding the trends, what products or services should be changed or eliminated?
- Understanding the trends, what new products or services could be developed?

Each set of new ideas should be expanded and investigated to determine their potential value to the organisation. While in brainstorming mode, avoid discussing the feasibility or cost of an idea. This time is for creative, not analytical, thinking.

Before you begin, you should consider how you will decide which are good ideas and which are great. There should be criteria to measure each against.

Thinking and exploration might be considered the strategic segment while the planning stage is the tactical segment. During the planning stage the realities of funding and resource constraints are brought to bear in selecting the best ideas for the plan. It is here that decision-making tools, based on desired criteria, are used to select options for the final strategic plan.

For example, criteria can be:

- Cost to set up
- Time required to complete the new service offering
- Fit with current products and services
- Potential for growth and profitability.

In planning, the traditional steps come into play, to include analysing strengths and weaknesses, opportunities and threats (SWOT), competition, and available resources. These latter aspects further guide the decision making, providing a different set of constraints. Note that many of the opportunities in the SWOT will have been considered in the think and explore stage. Here are some questions for this stage:

1. Which of the ideas fit your mission immediately, short term, and long term?
2. What are the time, talent, and resource requirements for the ideas?
3. Which of the ideas have the highest return-on-investment once implemented?
4. What does one have to do to implement the plan, as it pertains to people, skills, technology, and funds?

Consider three interlocking rings of who you are (strengths and weaknesses), what the customer wants (opportunities and threats), and what you stand for (purpose and mission). The central intersection created by these three rings will reveal the unique opportunities that only your circumstance can offer. This distinctive intersection might be called your 'fit', where no other organisation has the same conditions. Don't lose this potential to differentiate from the competition. In reality, strategic planning is a means to find your unique fit.

Document and confirm the strategic direction of the organisation with owners, directors, or senior management, and identify its impact on marketing activities

Complete a Situational Analysis

Before creating marketing objectives, plans, or even making decisions, it is important to 'scan' the external environment conducting a situational analysis. This will assist in defining and interpreting the state of the environment of an organisation. It provides the context and knowledge for planning by describing the competitive position, operating and financial condition of the organisation, as well as the general state of internal and external affairs. This is done to assess the current state before planning to move on.

There are many tools available with which to conduct a situational analysis.

- **SWOT Analysis**

A SWOT analysis is a structured planning method used to evaluate the strengths, weaknesses, opportunities and threats involved in a project or in a business venture.

- **Competitive Analysis**

A competitive analysis is a critical part of your organisational marketing plan. With this evaluation, you can establish what makes your product or service unique and therefore what attributes you play up in order to attract your target market. Google Advanced Search Operators and Google Alerts are competitive analysis tools. The Porter's Five Forces is also a competitive analysis tool.

- **Environmental Analysis**

This is the evaluation of the possible or probable effects of external forces and conditions on an organisation's survival and growth strategies. The PEST or PESTLE are environmental analysis tools.

- **Market Analysis**

A market analysis studies the attractiveness and the dynamics of a special market within a special industry. It is part of the industry analysis and thus, in turn, part of the global environmental analysis. Marketing Analytic programs (Google Analytics), Content Scoring (Kapoost's Content Scoring for example) and Predictive Modelling (Lattice Engines) are all market analysis tools.

- **Productivity or Profitability Analysis**

Profitability analysis is a component of enterprise resource planning (ERP) that allows administrators to forecast the profitability of a proposal or optimise the profitability of an existing project. You can access a fillable Profitability Analysis on the simulated business Bounce Fitness under the document / Finance tab.

- **Market Measurements**

Market measuring and forecasting requires an analysis of the market with an aim of expressing it in quantitative (numeric) quantities both present and in the future. The quantitative measurement and forecasting of the market, together with its qualitative characteristics, are used as a basis for decision making by marketing management. Market measurement and forecasting can be seen as a

subdivision of market research. Once the research is complete, the organisation must measure and forecast the size, growth, and profit potential of each market opportunity.

We will examine 3; the SWOT, PEST and Five Forces analysis.

PEST

The PEST analysis can be useful before the SWOT analysis because PEST helps to identify SWOT factors. PEST and SWOT are two different perspectives but can contain common factors. SWOT stands for strengths, weaknesses, opportunities, threats.

The organisation's marketing environment is made up of:

1. The internal environment, e.g. staff (or internal customers), office technology, wages and finance, etc.
2. The micro-environment, e.g. our external customers, agents and distributors, suppliers, our competitors, etc.
3. The macro-environment, e.g. Political (and legal) forces, Economic forces, Socio-cultural forces, and Technological forces. These are known as PEST factors.

Political Factors

The political arena has a huge influence upon the regulation of businesses, and the spending power of consumers and other businesses. You must consider issues such as:

1. How stable is the political environment?
2. Will government policy influence laws that regulate or tax your business?
3. What is the government's position on marketing ethics?
4. What is the government's policy on the economy?
5. Does the government have a view on culture and religion?
6. Is the government involved in trading agreements such as AUSFTA (Australian–United States Free Trade Agreement), ASEAN (Australia–New Zealand Free Trade Agreement), and SAFTA (Singapore–Australia Free Trade Agreement) to name a few.

Economic Factors

Marketers need to consider the state of a trading economy in the short and long terms. This is especially true when planning for international marketing. You need to look at:

1. Interest rates.
2. The level of inflation and employment levels per capita.
3. Long term prospects for the economy Gross Domestic Product (GDP) per capita, and so on.

Socio-cultural Factors

The social and cultural influences on business vary from country to country. It is very important that such factors are considered. Factors include:

1. What is the dominant religion?
2. What are attitudes to foreign products and services?
3. Does language impact upon the diffusion of products onto markets?
4. How much time do consumers have for leisure?
5. What are the roles of men and women within society?
6. How long are the population living? Are the older generations wealthy?
7. Do the population have a strong/weak opinion on green issues?

Technological Factors

Technology is vital for competitive advantage, and is a major driver of globalisation. Consider the following points:

1. Does technology allow for products and services to be made more cheaply and to a better standard of quality?
2. Do the technologies offer consumers and businesses more innovative products and services such as Internet banking, new generation mobile telephones, etc?
3. How is distribution changed by new technologies, e.g. books via the Internet, flight tickets, auctions, etc?
4. Does technology offer companies a new way to communicate with consumers, e.g. banners, Customer Relationship Management (CRM), etc?

PEST Example

Information that should be sought in each area includes:

Political

- Ecological / environmental current legislation
- Future legislation
- International legislation
- Regulatory bodies and processes
- Government policies
- Government term and change
- Trading policies
- Funding, grants, and initiatives
- Home market pressure - groups
- International pressure - groups
- Wars and conflicts

Economical

- Home economy
- Economy trends
- Overseas economies
- General taxation
- Taxation specific to product / services
- Seasonality issues
- Market / trade cycles
- Specific industry factors
- Market routes trends
- Distribution trends
- Customer / end-user drivers
- Interest / exchange rates
- International trade and monetary issues

Social

- Lifestyle trends
- Demographics
- Consumer attitudes and opinions
- Media views
- Law changes affecting social factors
- Brand, company, technology image
- Consumer buying patterns
- Fashion and role models
- Major events and influences
- Buying access and trends
- Ethnic / religious factors
- Advertising and publicity
- Ethical issues

Technological

- Competing technology development
- Research funding
- Associated / dependent technologies
- Replacement technology / solutions
- Maturity of technology
- Manufacturing maturity and capacity
- Information and communications
- Consumer buying mechanisms / technology
- Technology legislation
- Innovation potential
- Technology access, licensing, patents
- Intellectual property issues
- Global communications

By using the PEST analysis we can analyse the many different factors in a firm's macro environment. In some cases, particular issues may fit in several categories. If a factor can appear in several categories, managers simply make a decision of where they think it best belongs.

Think carefully about which factors are most likely to change and which ones will have the greatest impact on them. You need to clearly identify the factors in your environment. To do this, rank or score the likelihood of a change occurring and also rate the impact if it did. The higher the likelihood of a change occurring is, and the greater the impact of any change, the more significant this factor will be to the firm's planning.

It is also important when using the PEST analysis to consider the level at which it is applied. When analysing huge companies such as BP and TNT, it is important to remember that they have many different parts to their overall business – they include many different divisions and in some cases many different brands. Considering the whole business when using PEST is good in that it may highlight some important factors, but managers may want to narrow it down to a particular part of the business (e.g. a specific division of BP); this may be more useful because it will focus on the factors relevant to that part of the business. They may also want to differentiate between factors which are very local, others which are national, and those which are global.

SWOT

The SWOT analysis is very subjective and should always be focused upon a segment of the market. This will enable you to ask 'What are the Critical Success Factors (CSFs) that are essential to the decision-making process of the buyer in that segment?' Weight the CSFs so that you can separate those drivers that are most important.

Complete the strengths and weaknesses from the customer's point of view including their view in relation to the competition. This will allow you to match key CSFs to opportunities. Then rank those opportunities that are most profitable or sustainable. Finally, factor in the impact of threats.

Once your SWOT is completed, dovetail it with the rest of your strategic thinking. Some basic rules to remember:

- Be realistic about the strengths and weaknesses of the organisation.
- It should distinguish between where the organisation is today and where it could be in the future.
- It should always be specific – avoiding grey areas.
- Always apply SWOT in relation to the competition, i.e. Are we better than or worse than the competition?
- Keep the SWOT short and simple. Avoid complexity and over analysis.
- SWOT is subjective.

SWOT is a very popular tool with marketing teams. Questions that should be considered in each area include:

Strengths

- Price, value, quality?
- Advantages of proposition?
- Capabilities?
- Financial reserves, likely returns?
- Competitive advantages?
- USPs (unique selling points)?
- Marketing – reach, distribution, awareness?
- Resources, assets, people?
- Experience, knowledge, data?
- Innovative aspects?
- Location and geographical?
- Accreditations, qualifications, certifications?
- Processes, systems, IT, communications?
- Cultural, attitudinal, behavioural?
- Management cover, succession?

Weaknesses

- Morale, commitment, leadership?
- Disadvantages of proposition?
- Gaps in capabilities?
- Lack of competitive strength?
- Own known vulnerabilities?
- Continuity, supply chain robustness?
- Effects on core activities, distraction?
- Reputation, presence, and reach?
- Financials?
- Timescales, deadlines, and pressures?
- Cash flow, start-up cash-drain?
- Reliability of data, plan predictability?
- Accreditations, etc.?
- Processes and systems, etc.?
- Management cover, succession?

Opportunities

- Industry or lifestyle trends?
- Market developments?
- Partnerships, agencies, distribution?
- Competitors' vulnerabilities?
- New markets, vertical, horizontal?
- Technology development and innovation?
- Global influences?
- Niche target markets?
- Geographical, export, import?
- Market need for new USPs?
- Market response to tactics, e.g. surprise?
- Major contracts, tenders?
- Business and product development?
- Information and research?
- Market volume demand trends?
- Seasonal, weather, fashion influences?

Threats

- Political effects?
- Legislative effects?
- Environmental effects?
- IT developments?
- Competitor intentions – various?
- Market demand?
- New technologies, services, ideas?
- Vital contracts and partners?
- Obstacles faced?
- Insurmountable weaknesses?
- Employment market?
- Financial and credit pressures?
- Economy – home, abroad?
- Seasonality, weather effects?

SWOT Example

Here is an example of a SWOT to help you understand the concept:

Strengths

- Excellent communication skills
- Exceptional customer service
- Able to provide original and high quality product range
- Manager has completed Diploma in Business Administration and conducted in depth market research
- Start up finance not required
- Ability to expand product range

Weaknesses

- Large distances between potential retailers
- Poor storage in current premises for production and storage of stock
- Little knowledge or experience in mass production of stock

Business Opportunities

- Market research indicates:
 - Very large numbers of potential customers
 - A trends towards 'cottage craft' home decorating as society becomes more environmentally aware
 - Owners of retail outlets say it is difficult to find reliable, friendly, cost efficient suppliers
- Open a market stall to sell products direct to the public and also to see emerging trends first hand
- Immense number of potential raw material suppliers
- No other suppliers in Melbourne who only sell products handmade by Australian craftspeople
- Diversity in product range allows exploration of new outlets as preferred target market

Business Threats

- Some craftspeople may not want to supply me with stock due to decreased profit margin
- Across the board, imported home decorator products and giftware are cheaper in general than Australian made products
- From market research conducted, it was found that products sold in stores are more expensive than those same products sold at specialist craft markets
- At present there are no other wholesalers providing this proposed product or service, there is potential for someone to imitate this business idea within a short space of time

Once key issues have been identified with your SWOT analysis, they feed into marketing objectives.

Five Forces Analysis

Porter's Fives Forces Model is an excellent model to use to analyse a particular environment of an industry. We would use Porter's Model to help us find out about:

1. Competitive Rivalry
2. Power of Suppliers
3. Power of Buyers
4. Threats of Substitutes
5. Threat of New Entrants.

These are the key factors that influence industry performance, hence it is common sense and practical to find out about these factors before you enter the industry. We will discuss each.

- **Competitive Rivalry**

A starting point to analysing the industry is to look at competitive rivalry. If entry to an industry is easy then competitive rivalry will likely be high. If it is easy for customers to move to substitute products (for example, from coke to water) then again rivalry will be high. Generally competitive rivalry will be high if:

- There is little differentiation between the products sold between customers
- Competitors are approximately the same size as each other
- The competitors all have similar strategies
- It is costly to leave the industry, hence they fight to just stay in (exit barriers).

- **Power of Suppliers**

Suppliers are also essential for the success of an organisation. Raw materials are needed to complete the finished product of the organisation. Suppliers do have power. This power emerges:

- If they are the only supplier or one of few suppliers who supply that particular raw material
- If it costly for the organisation to move from one supplier to another (known also as switching cost)
- If there is no other substitute for their product.

- **Power of Buyers**

Buyers or customers can exert influence and control over an industry in certain circumstances. This happens when:

- There is little differentiation over the product and substitutes can be found easily
- Customers are sensitive to price
- Switching to another product is not costly.

- **Threat of Substitutes**

Are there alternative products that customers can purchase over your product that offer the same benefit for the same or less price? The threat of substitute is high when:

- Price of that substitute product falls
- It is easy for consumers to switch from one substitute product to another
- Buyers are willing to substitute.

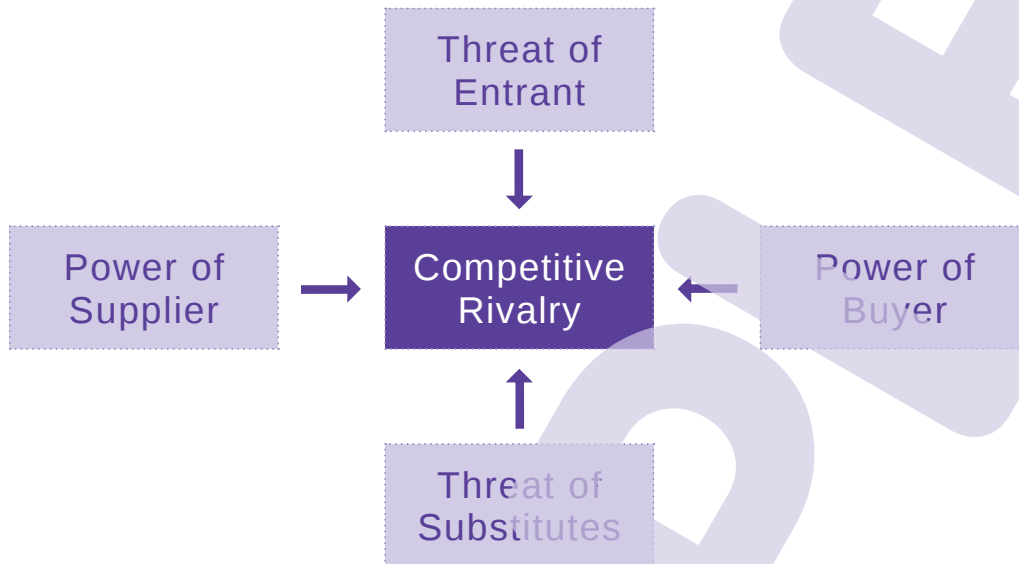
- **Threat of New Entrants**

The threat of a new organisation entering the industry is high when it is easy for an organisation to enter the industry, i.e. entry barriers are low.

An organisation will look at how loyal customers are to existing products, how quickly they can achieve economy of scales, whether they have access to suppliers, and whether government legislation would prevent them or encourage them to enter the industry.



Porter's Five Forces Model



Strategy consultants occasionally use Porter's Five Forces when making a qualitative evaluation of an organisation's strategic position. However, for most marketers, the framework is only a starting point or 'checklist'.

Legal and Ethical Requirements

Organisations must operate in a legal way and are governed by many laws and societal expectations. The actions of all organisations must be positively influenced by:

- **Codes of Practice**

Codes of Practice are sets of guidelines and regulations to be followed by members of some profession, trade, occupation, organisation, etc. They are not usually covered by law, but rather by agreement of participants or members.

Data in the Codes of Practice database consists of several different types – Codes of Practice (Australian & International), Standards (Australian & International), Australian Design Rules and 'Other'. Codes of Practice are published documents that set out commonly agreed sets of guidelines which inform all parties of responsibilities and expectations under the code. Codes of Practice can be:

- Voluntary agreements where a group of companies or an industry sector agree to abide by a particular code
- Quasi-regulation where the code may be developed by industry in cooperation with government
- Co-regulation where the code describes required performance or behaviour or specifies acceptable means of meeting broader performance based obligations and there are penalties for non-compliance with the code.

Standards are published documents that set out specifications and procedures designed to ensure that materials, products, methods, or services are fit for their purpose and consistently perform the way they were intended to. Codes of Practice website (<http://codes.bli.net.au/>) has copies of Codes of Practice available.

- **Cultural Expectations and Influences**

Consumers respond to the purchase with basic decision-making styles. However, understanding cross-cultural decision-making styles can generate insights to reduce the gap. Should managers apply a common or personalised management style to a specific culture? Despite globalisation, people from different nations continue to have their own distinct habits and tastes, their values and norms rooted in their national cultures. There is no evidence to show homogenisation of tastes or the appearance of universal price-minded consumer segments. Culture is dynamic and is constantly influenced by changes in the environment in social institutions (legal, political, commercial, etc.) and in an individual's own values. The shared cultural priorities in society help shape the social and economic reward contingencies to which people must adapt in the institutions in which they spend most of their time (families, schools, businesses, etc.) to function smoothly and effectively. People belonging to a particular national culture are subject to the conflicts and compatibilities between their own value structure and the national cultural priorities, so values and attitudes that are opposed to cultural priorities may be discouraged. Some marketers have become convinced that the role played by people's values is absolutely central to their personal development, to their actions as citizens and to their behaviour as consumers. A country's culture has long been identified as the key environmental characteristic underlying systematic differences in consumer behaviour.

- **Environmental Issues**

A variety of environmental problems now affect our entire world. As globalisation continues and the earth's natural processes transform local problems into international issues, few societies are being left untouched by major environmental problems. Some of the largest problems now affecting the world are Acid Rain, Air Pollution, Global Warming, Hazardous Waste, Ozone Depletion, Smog, Water Pollution, Overpopulation, and Rain Forest Destruction.

- **Ethical Principles**

These are the positions from which guidance can be obtained when making a decision and are important to behave morally, fairly, and equitably. Ethical theories and principles are the foundations of ethical analysis because they are the viewpoints from which guidance can be obtained along the pathway to a decision. Each theory emphasises different points such as predicting the outcome and following one's duties to others in order to reach an ethically correct decision. However, in order for an ethical theory to be useful, the theory must be directed towards a common set of goals. Ethical principles are the common goals that each theory tries to achieve in order to be successful. These goals include beneficence, least harm, respect for autonomy, and justice.

- **Work Health and Safety Act 2011 (WHS Act)**

Work Health and Safety (WHS) legislation is designed to ensure a safe and healthy workplace, and to reduce the number of injuries in the workplace by giving all staff responsibilities. Employers, self-employed people, those in control of work premises, machinery and substances, designers, manufacturers, suppliers and workers all have obligations with regard to workplace health, safety and welfare.

Although it differs in detail from state to state, in general Australian WHS legislation is aimed at achieving:

- Provide and maintain a safe working environment and safe systems of work
- Provide information to employees in relation to health, safety and welfare in the workplace.

Employees also have responsibilities under the health and safety laws:

- Follow instructions and rules in the workplace
- Work and behave in ways which are safe and do not endanger the health and safety of anyone in the workplace.

You can be disciplined by your employer or be prosecuted under the health and safety law in your State or Territory if you do not comply.

WHS Regulations

WHS is regulated by Commonwealth and state and territory government bodies. General information on their roles and responsibilities can be found at the following relevant website:

Workplace Harassment, Victimisation and Bullying:

Workplace harassment, victimisation and bullying are abuses or misuses of power characterised by aggressive behaviour or actions that intimidate, humiliate and/or undermine a person or group. Power can be due to organisational level, or occupation of any position having standing within the organisation, organisational knowledge or experience, gender, age or physical power. Workplace harassment, victimisation and bullying are unacceptable and are not to be tolerated under any circumstances. They may cause emotional damage, reduce morale and subsequently the loss of trained and talented employees.

Federal and state anti-discrimination/equal opportunity laws protect you from harassment and victimisation including: age; breastfeeding or pregnancy status; career status; disability or impairment; gender identity; being a union member (or not); sexual activity; marital status; sexual orientation; physical features (not including 'accessories' like tattoos or piercings); political activity or belief; race; religious belief; and gender.

Harassment is behaviour that another person does not want and does not return and or offends, embarrasses or scares that person. Harassment is against the law if it is about a person's disability, sex, race, colour, national or ethnic origin; any element covered in EEO legislation, or is of a sexual nature.

Harassment refers to behaviour towards an individual or group of individuals, that may or may not be based on the attributes listed above, and could be defined as “the repeated less favourable treatment of a person by another or others in the workplace, which may be considered unreasonable and inappropriate workplace practice (ref. An Employer’s guide: Workplace Bullying, Queensland Department of Employment, Training and Industrial Relations, 1998). It includes behaviour in circumstances where a reasonable person would have anticipated the possibility that the other person would be offended, humiliated or intimidated by the conduct.

Often harassment in the workplace involves a misuse of power. This might be a person in authority who intentionally undermines, humiliates or destroys the confidence and self-esteem of an individual or group. Harassment may occur between people of any gender.

Under federal and state legislation unlawful harassment occurs when someone is made to feel intimidated, insulted or humiliated because of their race, colour, national or ethnic origin; sex; disability; sexual preference; or some other characteristic specified under anti-discrimination or human rights legislation. It can also happen if someone is working in a ‘hostile’ or intimidating environment.

Sexual Harassment is behaviour of a sexual nature that is unwelcome, unsolicited and unreciprocated. The gender and sexual orientation of the perpetrator or victim is irrelevant.

Examples of Harassing Behaviour

Harassment may be subtle or overt and includes, but is not limited to, the following forms of behaviour:

- Abusive and offensive language or shouting
- Constant unreasonable criticism about work or performance, often about petty or insignificant matters
- Deliberate exclusion, isolation or alienation of a staff member
- Allocation of humiliating or demeaning tasks, or sabotaging a person’s work
- Setting of impossible deadlines with unrealistic expectations of work
- Spreading gossip or false and malicious rumours with an intent to cause harm to a person
- Sarcasm or ridicule
- Threatening gestures or actual violence
- Inappropriate comments about personal appearance
- Electronic harassment such as through email, SMS
- Hazing or bastardisation (such as harmful or humiliating initiation rituals).

Victimisation occurs when a person does an act, or threatens to do an act against a person because:

- They have made a complaint, (complainant) or are associated with a person who has made a complaint under this policy, or
- They have had a complaint made against them (respondent) or are associated with a person who has had a complaint made against them under this policy.

Bullying is a form of harassment. Bullying behaviour is based on the misuse of power in human relationships. From an occupational health and safety perspective, workplace bullying is defined as: repeated, unreasonable behaviour directed towards a person or group of persons at a workplace, which creates a risk to health and safety.

“Unreasonable behaviour” is behaviour that is offensive, humiliating, intimidating, degrading or threatening. It includes, but is not limited to:

- Verbal abuse
- Initiation pranks
- Excluding or isolating employees
- Giving a person the majority of an unpleasant or meaningless task
- Humiliation through sarcasm, or belittling someone's opinions
- Constant criticism or insults
- Spreading misinformation or malicious rumours
- Setting impossible deadlines
- Deliberately changing work rosters to inconvenience certain employees
- Deliberately withholding information or resources, that are vital for effective work performance
- Manipulating the impression of others to split the work group into taking sides
- Displaying written or pictorial material which may degrade or offend certain employees

Examples of bullying include yelling, abusive language, continually criticising someone, isolating or ignoring someone, imposing unnecessary pressure with overwork or impossible deadlines and sabotaging someone's work, or their ability to do their job by withholding vital information and resources.

Additional information for managers and supervisors related to workplace harassment can be found in the 'Prevention of Workplace Harassment Advisory Standard 2004' guidelines which are at <https://www.qld.gov.au/law/your-rights/workplace-rights/harassment-and-bullying/> and also at the following websites:

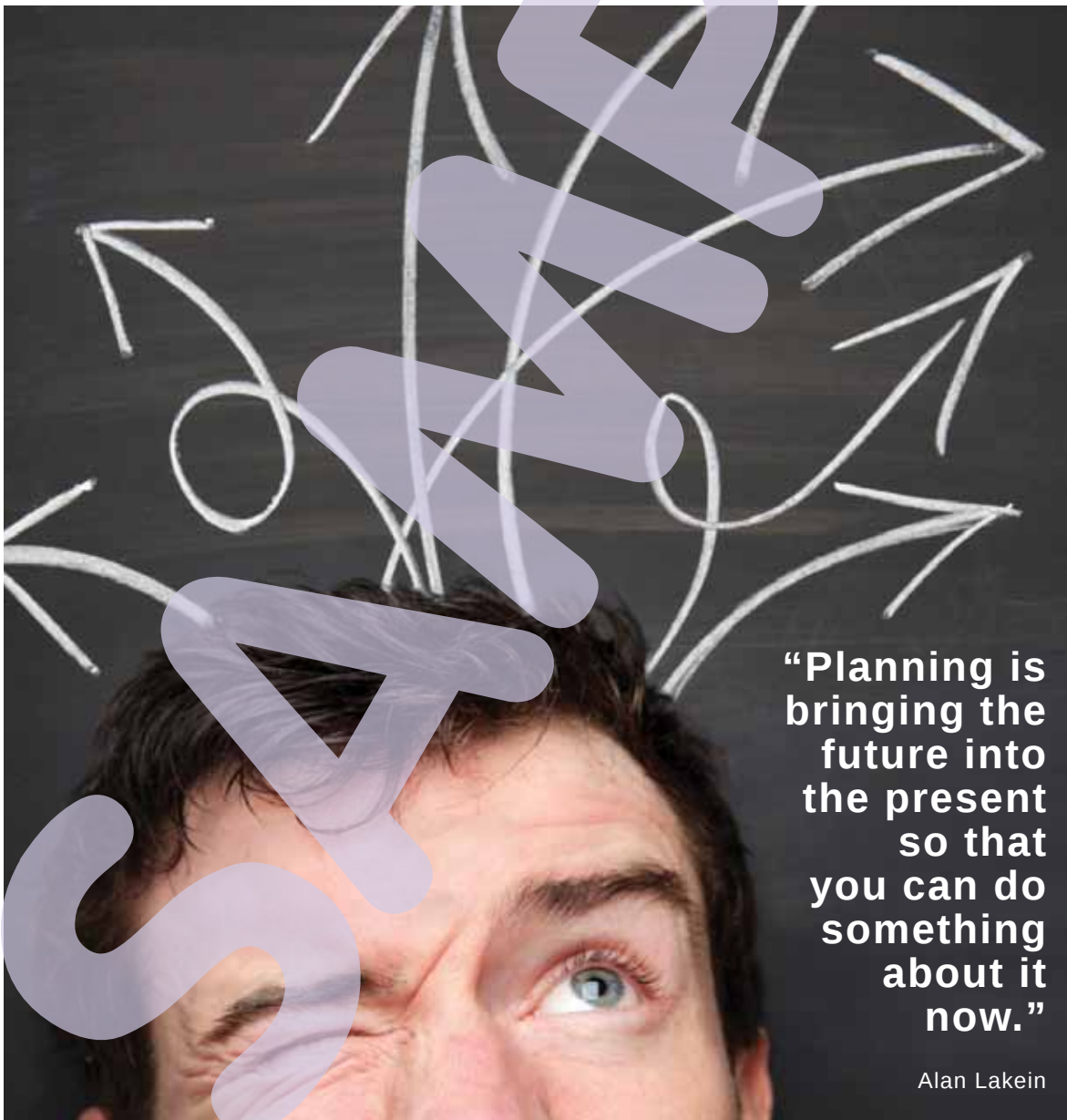
<http://www.safeworkaustralia.gov.au>

- **Legislation**

Legislation is the act of making or enacting laws. When people talk about 'the legislation', they mean a law or a body of laws. The legislation in a state or territory are all the laws enacted specifically to control and administer the state or territory.

- **Policies and Guidelines**

These are written by organisations to ensure that staff and stakeholders act responsibly and make rational, well-informed decisions. They help it to be consistent in its approach to decision making and problem solving across the organisation's locations if appropriate. In order for staff and stakeholders to understand their responsibilities within the organisation, it is very important that policies and procedures are adopted and clearly communicated to everyone.



- **Regulations**

These are administrative 'rules' that describe rights and allocate responsibilities. They can take many forms such as being legal restrictions established by a government authority, a self-regulating mechanism for an industry such as a trade association, social regulations such as 'norms', co-regulation, or market regulation. They are actions of conduct imposing sanctions such as a fine.

- **Security and Privacy Issues**

Customers must be assured about how you are going to protect their personal information and reduce the risk of identity theft. Reasonable security measures to protect customer data and comply with privacy requirements must be included.

You must choose to post privacy policies that describe how consumers' personal information is collected, used, shared, and secured. While not required by law, creating a privacy policy is important if you want people to buy your products, particularly if you are involved in e-commerce.

A privacy policy must ensure that the organisation follows the policy by implementing reasonable security measures to protect your organisation's data.

- **Social Responsibility**

Social responsibility is an ethical framework which suggests that an entity, be it an organisation or individual, has an obligation to act for the benefit of society at large. Social responsibility is a duty every individual has to perform so as to maintain a balance between the economy and the ecosystems.

- **Societal Expectations**

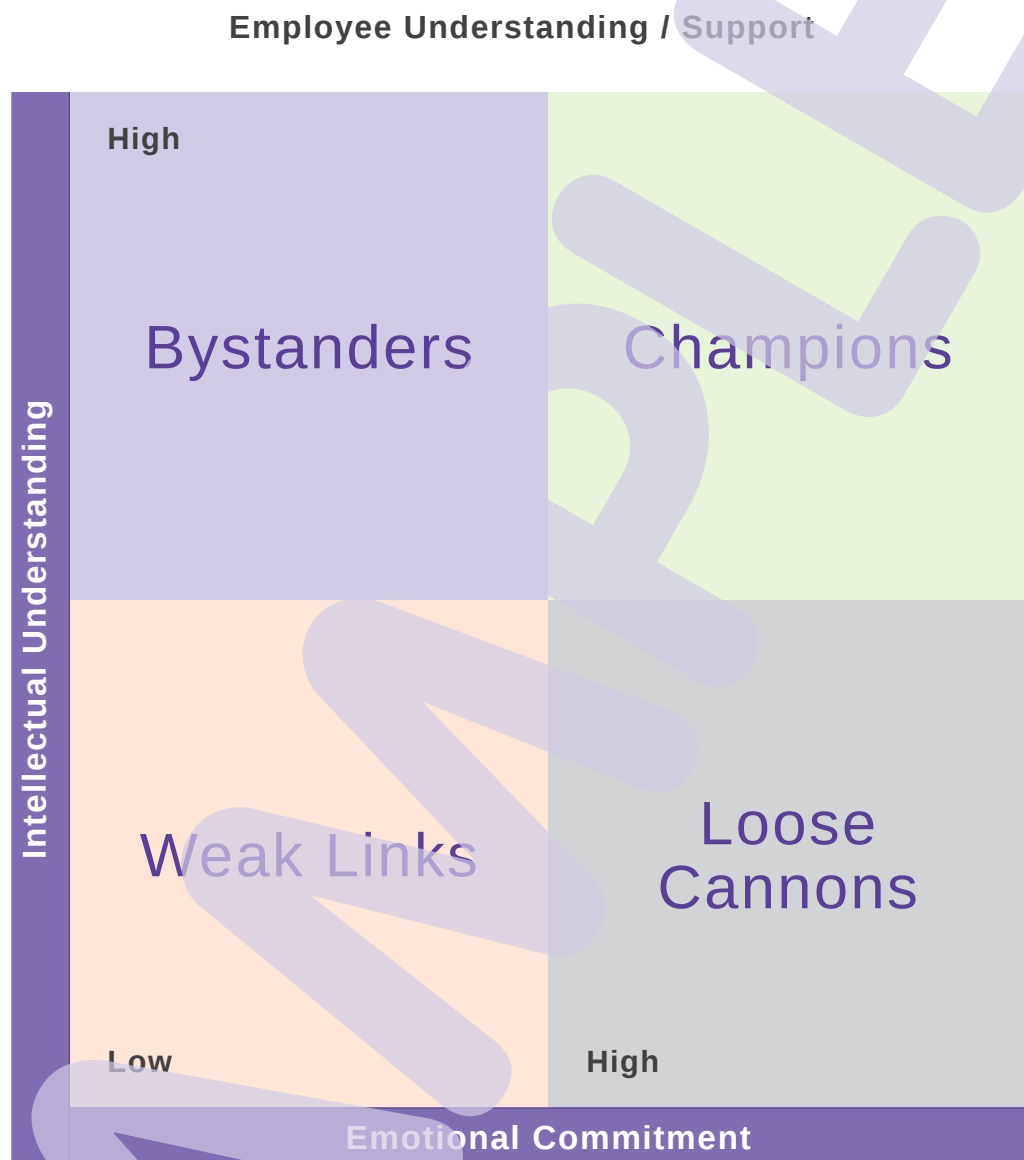
We live within a structure of social expectations, of belief, awareness, and apprehension of how others will react to our behaviour, respond to our acts, play their roles in this human theatre. As we behave toward others, we not only perceive them in roles relative to ourselves but we also apprehend how our behaviour will affect them and what we can expect in return. These expectations clearly modify our dispositions, but how this relation manifests itself, how it finally issues in social behaviour requires a more detailed analysis of social behaviour.

Document and Confirm the Strategic Direction

Once the strategic direction has been decided and is agreed with the senior management, it must be documented and communicated. The documentation means updating or adding to the vision, mission and values. Once this has been attended to, the information must be communicated to the stakeholders.

When spending significant time and money on communicating strategic information, it is important to ensure it is worthwhile and that there is no misinterpretation of the messages you are trying to convey. To be successful, this requires employees and senior management to adopt a combination of self-knowledge and a willingness to listen and think differently about the strategic information, their roles, and commitment to the organisation.

A model for measuring employee understanding and commitment to strategic goals is shown in the diagram following:



Communication gravitates around the audience: without a solid understanding of your audience, you are not communicating – you are merely dropping information into a vacant area and hoping for the best.

There are numerous internal challenges to communicating about the strategic direction to employees, not least appreciating their level of understanding and planning appropriately according to the needs and capabilities of different employee segments.

Use this checklist to ensure you are making your materials sensitive to employees' emotional needs:

- Get all the right people at the table right from the start
- Tone of voice must be very clear and agreed
- Incorporate face-to-face communication into the mix
- Employees need space to review and share
- Manage emotional empathy.

Communicating about the business to employees presents a range of challenges, even with the greatest amount of planning and research. Key to this is how you effectively cascade material in a way that will create a clear line of sight at every level. In a large organisation, how you strike the right balance between global and local strategy, and how you effectively balance local and corporate business priorities, are vital issues. An effective method includes:

- **Planning:** Understand the information, the intent of your communication effort, the employee expectations of it, and the audience's perspective.
- **Quiz yourself and the communication experts:** To ensure everything you are saying will be understood by the audience.
- **Differentiate between 'need-to-know' and 'noise':** Senior leaders often want to disclose too much, which can lead to communication becoming 'noise.' Try to communicate an idea rather than a number.
- **Whose bottom line is it:** Remember, not everyone has the same concept of the 'bottom line,' so concentrate on what your audience wants from the information.
- **Match metaphors to audience:** Remember the professional and personal perspective of the audience, and use key words and phrases to make communication easier to understand.



Activity One – SWOT

Use the following Activity to test your understanding of completing a SWOT analysis on the grid.

Case Study

Bounce Fitness Centre has hired you to help them with their marketing decision making. Perform a SWOT analysis on Bounce Fitness, based upon the following issues:

1. The Brisbane Centre is located within a two-minute walk of the main bus station, and is a fifteen-minute ride away from the local railway station.
2. There is a competition standard swimming pool; although it has no wave machines or whirlpool equipment as do competing local facilities.
3. It is located next to one of the largest shopping centres in Brisbane.
4. It is one of the oldest centres in the area and needs some cosmetic attention.
5. Due to an increase in disposable income over the last six years, local residents have more money to spend on leisure activities.
6. There has been a substantial decrease in the birth rate over the last ten years.
7. In general, people are living longer and there are more local residents aged over fifty-five now than ever before.
8. After a heated argument with the manager of a competing leisure centre, the leader of a respected local scuba club is looking for a new venue.
9. The local council is considering privatising all local government fitness centres by the year 20XX.
10. Press releases have just been issued to confirm that the Brisbane Bounce Fitness Centre is the first centre in the area to be awarded an ISO quality assurance standard.
11. A private joke between staff states that if you want a day-off from work that you should order a curry from the Centre's canteen, which has never made a profit.
12. The Centre has been offered the latest sporting craze.
13. Brisbane Bounce Fitness Centre has received a grant to fit special ramps and changing rooms to accommodate the local disabled.
14. It is widely acknowledged that Brisbane Bounce Fitness has the best-trained and most respected staff of all of the centres in the district.



Activity One – SWOT



Activity One – SWOT



Trainer's Notes for Activity One

All answers may not completely agree. This does not mean that anyone is wrong. It simply means that the results of the analysis are represented in a different way.

Points 2 and 10 are difficult to place.

Point 2 depends on whether or not wave machines or a whirlpool have a distinct competitive advantage over a competition standard pool.

Point 10 is an internal strength and an external opportunity.

However, as a guide:

1. The Brisbane Centre is located within a two-minute walk of the main bus station, and is a fifteen-minute ride away from the local railway station. **Strength**
2. There is a competition standard swimming pool; although it has no wave machines or whirlpool equipment as do competing local facilities. **Strength/Weakness**
3. It is located next to one of the largest shopping centres in Brisbane. **Opportunity**
4. It is one of the oldest centres in the area and needs some cosmetic attention. **Weakness**
5. Due to an increase in disposable income over the last six years, local residents have more money to spend on leisure activities. **Opportunity**
6. There has been a substantial decrease in the birth rate over the last ten years. **Threat**
7. In general, people are living longer and there are more local residents aged over fifty-five now than ever before. **Threat**
8. After a heated argument with the manager of a competing leisure centre, the leader of a respected local scuba club is looking for a new venue. **Opportunity**
9. The local council is considering privatising all local government fitness centres by the year 20XX. **Opportunity**
10. Press releases have just been issued to confirm that Brisbane Bounce Fitness Centre is the first centre in the area to be awarded an ISO quality assurance standard. **Opportunities/Threat**
11. A private joke between staff states that if you want a day-off from work that you should order a curry from the Centre's canteen, which has never made a profit. **Weakness**
12. The Centre has been offered the latest sporting craze. **Opportunity**
13. Brisbane Bounce Fitness Centre has received a grant to fit special ramps and changing rooms to accommodate the local disabled. **Strength**
14. It is widely acknowledged that Brisbane Bounce Fitness has the best-trained and most respected staff of all of the centres in the district. **Strength**

Key Points Element 1



- The organisation's mission, vision, purpose, and values must be confirmed with current organisational materials or from owners, directors, or senior management to ensure you understand the needs
- The strategic organisational documents must be analysed to identify the organisational directions and targets
- A situational analysis must be completed to identify factors that could impact on the direction and performance of the business
- Legal and ethical requirements for the organisation must be noted to ensure the legality of future endeavours
- Document and confirm the strategic direction of the organisation in agreement with the owners, directors, or senior management, and identify its impact on marketing activities.

Element 1 – ‘True’ or ‘False’ Quiz

		True	False
Q	Once you know the vision of the organisation, you are in a position to start to analyse them to work out the strategic direction that they indicate should be taken.		✓
	Once you know the mission, vision, and values of the organisation, you are in a position to start to analyse them to work out the strategic direction that they indicate should be taken.		
Q	If the organisation is working towards building its sustainability, unethical decisions taken can result in dire consequences.	✓	
Q	At least 20% of the strategic plan should be new ideas. If there is not a steady stream of new initiatives, then the strategic plan will be more like treading water.	✓	
Q	If the strategic planning was done well, the plan provides a useful focus that energises and moves the organisation toward its demise.		✓
	If the strategic planning was done well, the plan provides a useful focus that energises and moves the organisation toward its mission goals, plus it provides a document to recruit others to the mission.		
Q	High ethical standards in an organisation aid business managers in making informed, focused, and quality decisions.	✓	
Q	Poor ethics have never been challenged in a legal case.		✓
	Poor ethics have been the basis of many legal cases where people seek compensation for the losses they have suffered as a direct or indirect result of the decisions of business people not following basic ethical standards.		
Q	From a legal perspective, organisations must trade within the requirements of the Australian Law.	✓	
Q	The vision, mission, and values of any organisation are the North Star or guiding light of the subsequent strategic planning.	✓	
Q	In planning, the traditional steps are avoided in favour of brainstorming.		✓
	In planning, the traditional steps come into play and include analysing strengths and weaknesses, opportunities and threats (SWOT), competition, and available resources.		
Q	Strategy consultants occasionally use Porter's Five Forces when making a qualitative evaluation of an organisation's strategic position.	✓	