

Specification of Competency Standards of the Insurance Industry

**Unit of Competency**

**Functional Area: Marketing**

Title	Create promotional gifts
Code	105508L4
Range	This unit of competency is applicable to those who are responsible for creating promotional gifts to support marketing or advertising plans. It involves creation of gift ideas and engaging suppliers to produce the actual gifts.
Level	4
Credit	3 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> <li>1. Possess knowledge in marketing promotion <ul style="list-style-type: none"> <li>• Understand corporate marketing strategy</li> <li>• Comprehend marketing plan</li> <li>• Comprehend advertising campaign</li> <li>• Familiar with processes to source gift suppliers</li> </ul> </li> <li>2 (a). Create promotional gift ideas <ul style="list-style-type: none"> <li>• Define objectives of promotional gifts, e.g. to improve brand visibility, to promote key message of marketing plan/advertising campaign</li> <li>• Identify target segments</li> <li>• Determine how gifts are to be given out</li> <li>• Identify quantity required, budget and time allowed for production</li> <li>• Identify gift options</li> <li>• Evaluate promotional effectiveness of each option</li> <li>• Obtain approval from supplier on gift option</li> </ul> </li> <li>2 (b). Engage supplier to produce gifts <ul style="list-style-type: none"> <li>• Identify potential suppliers</li> <li>• Communicate gift requirements with potential suppliers to obtain quotations</li> <li>• Obtain samples from potential suppliers</li> <li>• Negotiate unit rates with suppliers</li> <li>• Evaluate suppliers to meet production, budget and schedule requirements</li> <li>• Obtain approval from superior to start production</li> <li>• Engage supplier with legal contract/purchase order</li> <li>• Monitor production of gifts</li> </ul> </li> <li>2(c). Review gift idea <ul style="list-style-type: none"> <li>• Provide gifts in intended quantities</li> <li>• Review gift idea based on staff and customer feedback.</li> </ul> </li> <li>3. Create promotional gifts to effectively achieve intended marketing objectives <ul style="list-style-type: none"> <li>• Develop gift ideas that clearly convey key messages of marketing plan/advertising</li> <li>• Engage competent supplier to produce gift items that adhere to gift requirements, budget and production timeline</li> <li>• Evaluate gift idea based on staff and customer feedback.</li> </ul> </li> </ol>
Assessment Criteria	<p>The integrated outcome requirements of this unit of competency are:</p> <ul style="list-style-type: none"> <li>• Able to identify objectives of developing promotional gifts</li> <li>• Able to identify potential gift options and determine the gift idea that best achieve the intended objectives</li> <li>• Able to engage competent supplier to produce actual gifts in accordance to predefined requirements</li> <li>• Able to review gift idea based on staff and customer feedback.</li> </ul>
Remark	This unit of competency is also applicable to general insurers and life insurers.