



# **Core Curriculum Competency Requirements**

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## 1 INTRODUCTION

To help ensure the highest level of professionalism and competency in the practice of marketing research in Canada, the MRIA is advocating a comprehensive marketing research exam (CMRE) leading to the Certified Marketing Research Professional (CMRP) designation.

### 1.1 Purpose

The purpose of this document is:

- to prescribe the skills and knowledge required of Marketing Research professionals;
- to explain the objectives and structure of the Comprehensive Marketing Research Exam (CMRE);
- to prescribe the boundaries on examinable subject matter on the CMRE; and
- to describe the Maintenance of Certification – also known as Mandatory Continuing Education – requirements.

### 1.2 Users of this Document

This document is intended to be useful to

- the MRIA *Institute for Professional Development* and its instructors, in the design and delivery of professional education programs;
- the MRIA *Certification Advisory Committee*, by providing the framework within which it sets the CMRE and the Maintenance of Certification requirement;
- candidates, in preparing for the CMRE; and
- employers of candidates, in the design and delivery of in-house training and practical experience programs that prepares candidates for the CMRE.

## 2 CRITERIA FOR ADMISSION TO THE PROGRAM

There are two paths to be qualified to write the CMRE:

1. Complete the MRIA Certification Program
  - Possess a university degree from a recognized university.

- Complete the MRIA's Institute for Professional Development 12 Core Courses or equivalent.
  - Have a minimum of two (2) years of marketing research work experience.
2. Challenge the exam (write the CMRE without completing the 12 Core Courses):
- Have successfully completed the MRIA Core Course 102-Ethical Issues and Privacy in Marketing Research.
  - For candidates holding a university degree from a recognized university: Have a minimum of eight (8) years of work experience at a professional level in the marketing research and intelligence industry at the time of application.
  - For candidates without a university degree from a recognized university: Have a minimum of twelve (12) years of work experience at a professional level in the marketing research and intelligence industry at the time of application.

*Equivalents:*

- a) Graduates of the following programs are not required to take any of the MRIA Core courses and are fully qualified to write the CMRE, provided they possess a university degree from a recognized university and at least two (2) years of marketing research work experience:
- Georgian College, Research Analyst Program
  - Algonquin College, Marketing and Business Intelligence Research Program
- b) Graduates of the University of Georgia (Marketing Research Institute International) Principles of Marketing Research course are qualified to write the CMRE provided they possess a university degree from a recognized university, have at least two (2) years of marketing research work experience and have completed the MRIA Core course "102-Ethical Issues and Privacy in Marketing Research"
- c) Other university, college and professional development courses will be assessed on a case by case basis.

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## 3 COMPREHENSIVE MARKETING RESEARCH EXAMINATION

### 3.1 Responsible Bodies

The CMRE is administered on behalf of the *MRIA Institute for Professional Development* by the Certification Advisory Committee. This committee comprises one MRIA staff—the Manager – Professional Development & Certification—and six MRIA volunteers. The list of the current members of the MRIA Certification Advisory Committee can be found on the MRIA website at <http://www.mria-arim.ca/COMMITTEES/Examiners.asp>.

### 3.2 Objective

The objective of the CMRE is to ascertain whether candidates possess the core skills, knowledge, and competency required for careers as professional marketing researchers.

### 3.3 Structure

The CMRE consists of two papers of 3.5 hours each. The passing mark for each paper is 65%; both sections must receive at least 65% to pass the exam. Candidates who fail the CMRE must successfully rewrite both sections at a later date if they wish to obtain the CMRP designation, unless they have received a mark of 80% or higher for the other section. In such instance, they will be allowed to rewrite only the failed section.

### 3.4 Types of questions

The examination includes the following three types of questions:

Type of Question	Range of Marks Allocated
Part A: Marketing research proposal in response to a specific case study	100
Part B: 20 to 25 single subject & multi subject short essay type questions	100*

\*NOTE: The sum of the marks allocated to each question may exceed 100 but the total will then be adjusted to a score out of 100 to calculate the final exam mark.

### **3.5 Process**

The CMRE is a closed-book examination, and no reference materials are permitted. The exam is proctored and all necessary material will be supplied on location. Candidates are not permitted to bring their own calculators, computers, or electronic data storage devices into the examination room.

Exam writers complete Part A in the morning and Part B in the afternoon.

## **4 CORE SKILL REQUIREMENTS**

Marketing Researchers must exercise certain core skills in performing professional work. The CMRE therefore tests the candidate's ability to demonstrate the seven (7) interrelated skills described below. Both parts of the CMRE are equally important at assessing whether the candidate sufficiently masters these core skills. Neither Part A nor Part B are designed to be responded solely with memorized information.

### **4.1 Application of Core Knowledge**

The CMRE consists of a series of questions designed primarily to simulate assignments that Marketing Researchers encounter in professional practice. Accordingly, the CMRE evaluates the ability of candidates to draw upon relevant core knowledge and to apply that knowledge to the specific facts and requirements presented in each question. Responding solely with memorized information is not sufficient to constitute a satisfactory professional response.

### **4.2 Identification of Issues**

In identifying, defining and ranking problems and issues, candidates are required to take the following factors into account:

- the specific facts and other information explicitly or implicitly presented in the question;
- the stated and underlying requirements of the question; and
- the users' explicit and implicit needs.

### 4.3 Analysis

Analysis is defined in general terms as the ability to break something down into its component parts. In critically analyzing problem situations that may be encountered in the CMRE, candidates are expected, as necessary, to be able to:

- distinguish between facts and opinion;
- identify cause-and-effect relationships
- make logical inferences;
- identify relevant assumptions and underlying conclusions;
- identify limitations of given information; and
- distinguish relevant from irrelevant information and reliable from unreliable information.

In some CMRE questions the problems or issues posed may be implicit, rather than explicit. In these cases, candidates will have to analyze the qualitative and quantitative information given in order to identify, define or diagnose the problems embedded in the question.

There is no necessary relationship between the depth of analysis and the type of question (comprehensive, multi-subject, or single-subject). Given the content and requirements of the question, candidates are expected to do as much analysis as is necessary to provide a professional response.

### 4.4 Integration

Integration may be defined in general terms to mean the forming or combining of parts into a whole, or the viewing of the parts of something as a whole. In the context of CMRE, integration has two distinct but interrelated implications: integration of knowledge and integration of issues.

The CMRE emphasizes the integration of knowledge from more than one subject area or topic. Candidates are required to combine knowledge of topics from different syllabus subject areas, or knowledge of different topics within the same subject area, and apply that knowledge as a whole to the solution of problems.

Integration in response to CMRE questions, however, goes beyond the integration of knowledge from more than one subject area or topic. As stated earlier, CMRE questions are designed to simulate assignments that Marketing Researchers encounter in professional practice. Accordingly, each question may contain a number of issues that must be examined in relation to one another and as a whole. It is not acceptable to treat

a question as though it contains a series of separate, unrelated problems arbitrarily “bundled” together.

#### **4.5 Professional Judgement**

Judgement can generally be defined as the process of making a choice or decision leading to action. Professional judgement is judgement exercised within a framework provided by applicable professional standards and

- involves a meaningful choice
- involves a process from perceiving the problem to making the decision
- involves expertise, due care, and professional objectivity; and
- involves recognition of situations where referral to specialist is appropriate.

Candidates are expected to exercise professional judgment to the extent appropriate in responding to most CMRE questions. Frequently there is no single, irrefutable answer to a business problem, so the exercise of professional judgement becomes critical.

#### **4.6 Responding to Users’ Needs**

In many instances, the preparation of a satisfactory professional response requires the evaluation of alternatives and the presentation of practical solutions and recommendations that meet, to the extent possible, the requirements and objectives of the parties to which the candidate is responsible within the context of the question. These user needs will vary with the scenario presented in each question, and the candidate must determine the effect that such requirements and objectives have on the priority of and approach to be taken to the issues presented.

#### **4.7 Effective Communication**

A requirement in the work of Marketing Researchers, and therefore a fundamental skill tested in the CMRE, is the ability to communicate effectively. Limited in scope to written communications, the CMRE evaluates the ability of candidates to convey their ideas clearly, concisely, and logically. Effective communication in responding to the questions necessitates that candidates:

- present ideas in a logical sequence;
- clearly explain the application of principles and theories; and
- present arguments that are relevant and reasoned.



Communicating effectively means conveying relevant information in a manner suited to the role assigned by the question and designed to meet the users' needs. If, for example, the question requires the candidate to write a memo to a fellow marketing researcher, then it may be acceptable to omit explanations of technical concepts/terminology that the researcher is certain to know. If, however, the question requires the candidate to write a report to a non-researcher, then more explanation may be necessary and non-technical language should be used to the extent appropriate.

## 5 CORE COMPETENCY REQUIREMENTS

The topics listed in the subject areas section constitutes the core competencies (knowledge, skills and abilities) that candidates are expected to possess. In addition, candidates must possess a broad understanding of the business environment in which professional marketing researchers operate. This background knowledge is necessary in order to understand and apply knowledge of the topics listed in the subject area section. Candidates will be expected to draw upon this background knowledge in formulating a professional response.

### 5.1 Levels of Understanding

Entry-level marketing research professionals are expected to have a more extensive knowledge of some topics than of others. One of three “levels of expectations” is therefore specified for each topic (identified in Subject Areas section). These expectation levels provide guidance on the depth of knowledge that candidates are expected to possess. The three levels, A, B, and C, are defined below.

### 5.2 Expectation Level Definitions

Expectation Level A (Thorough knowledge)

- Candidates are expected to have a thorough and detailed knowledge and comprehension of topics classified as Level A.
- Level A topics are fundamental to the practice of Marketing Research.
- Candidates are expected to fully understand the complexities of Level A topics.

Expectation Level B (Working knowledge)

- Candidates are expected to have a working knowledge and comprehension of the topics classified as Level B.
- Level B topics are central or mainstream to and arise frequently in day-to-day professional practice.
- Candidates are not expected to fully understand the complexities of Level B topics at this stage of their careers.

Expectation Level C (General familiarity)

- Candidates are expected to have a general familiarity with the topics classified as Level C

- Level C topics either arise less frequently in day-to-day professional practice or are emerging, specialty or peripheral topics. For these reasons, neither a thorough nor working knowledge of Level C topics is crucial to entry-level Marketing Researchers.
- Candidates are expected to be familiar with these topics and understand their broad implications.

## 6 SUBJECT AREAS

A listing follows of the specific topics that a candidate must know for the CMRE. Levels of expectation (A, B, or C) are specified for each topic.

<b>I. PROFESSIONAL PRACTICE</b>			
This subject area sets out the topics related to ethics and quality control. These core knowledge requirements are of relevance to Marketing Researchers in all areas of practice. Candidates are expected to possess, at the expectation level specified, knowledge of professional ethics and quality controls in all areas of professional activity. Knowledge in this area can be acquired through the education program, professional practice, and through the MRIA code of professional conduct.			
	<b>A</b>	<b>B</b>	<b>C</b>
1. Rules of Conduct & Good Practice			
1.1 General Rules for the Conduct of Research			
1.1.1 Integrity and Due Care	✓		
1.1.2 Competence	✓		
1.1.3 Objectivity	✓		
1.1.4 Quality Control	✓		
1.1.5 Projectability of Research Results	✓		
1.1.6 Documentation of Work Performed	✓		
1.1.7 Access to Documentation	✓		
1.1.8 Recruitment	✓		
1.1.9 Use of Marketing Research Information	✓		
1.1.10 Using the Services of Others	✓		
1.1.11 Professional Development	✓		
1.2 The Responsibility of Members to the Public			
1.2.1 Treatment of Respondents	✓		
1.2.2 Respondents' Rights	✓		
1.2.3 Respondent Confidentiality and Privacy	✓		
1.2.4 The Use of Monitoring Tools	✓		
1.2.5 Research with Minors	✓		

<b>I. PROFESSIONAL PRACTICE</b>			
1.2.6 Selling and Fundraising Under the Guise of Marketing Research	✓		
1.3 The Responsibility of Clients to Practitioners			
1.3.1 Competitive Bids		✓	
1.3.2 Ownership of Research Techniques		✓	
1.3.3 Dissemination of Research Results	✓		
1.3.4 Liability		✓	
1.3.5 Fees and Remuneration		✓	
1.4 The Responsibility of Practitioners to Clients			
1.4.1 Privacy and Confidentiality	✓		
1.4.2 Multi-Client Projects	✓		
1.4.3 Verification of Interviews	✓		
1.4.4 Disclosure of Research Methodology	✓		
1.4.5 Security of Information	✓		
1.4.6 Fees and Remuneration		✓	
1.4.7 Use of Clients Name	✓		

<b>II. MARKETING RESEARCH DESIGN</b>			
This subject area sets out the topics related to the design of marketing research studies. Candidates are expected to possess, at the expectation level specified, knowledge of the marketing research design concepts, practices, and methods associated with each line item			
	<b>A</b>	<b>B</b>	<b>C</b>
1. The Need for Marketing Research			
1.1 Value of Marketing Research	✓		
1.2 Reducing Uncertainty	✓		
1.3 Problem Solving	✓		
1.4 Monitoring Trends and Performance	✓		
1.5 The Cost vs. Value of Marketing Research	✓		
2. Defining the Research Objectives	✓		

<b>II. MARKETING RESEARCH DESIGN</b>			
3. Research Designs			
3.1 Exploratory, conclusive, and tracking research	✓		
3.2 Cross-sectional and longitudinal design		✓	
3.3 Secondary and Primary Research	✓		
3.4 Quantitative and Qualitative Research	✓		
3.5 Tools for Data Collection			
3.5.1 Surveys (Mail, Telephone, In-person, Omnibus)	✓		
3.5.2 Research Panels	✓		
3.5.3 In-depth Interviews	✓		
3.5.4 Focus Groups	✓		
3.5.5 Experimental Designs	✓		
3.5.6 On-line vs. other data collection methods	✓		
4. Designing a Research Project			
4.1 Criteria for Selecting a Research Design			
4.1.1 Determining the Specific Information Needs	✓		
4.1.2 Identifying the sources of the required information.	✓		
4.2 Appropriate use of Data Collection Tools	✓		
4.3 Elements of a Research Plan/Proposal			
4.3.1 Background	✓		
4.3.2 The Research Problem	✓		
4.3.3 Objectives of the Research	✓		
4.3.4 Need for External Resources	✓		
4.3.5 Research Techniques Used	✓		
4.3.6 Scope of the Study	✓		
4.3.7 Deliverables	✓		
4.3.8 Limitations	✓		
4.3.9 Timeline	✓		
4.3.10 Costs	✓		

### III. STATISTICAL METHODS FOR MARKETING RESEARCH

This subject area sets out the topics related to the statistical methods used in analyzing marketing research data. Candidates are expected to possess, at the expectation level specified, knowledge of the statistical concepts. Candidates are not responsible for knowledge of specific proprietary hardware and software products practices and methods associated with each line item.

	A	B	C
1. Sampling Methods			
1.1 The Need for Sampling	✓		
1.2 Defining the Study Population			
1.2.1 Element	✓		
1.2.2 Population	✓		
1.2.3 Sampling Unit	✓		
1.2.4 Sampling Frame	✓		
1.2.5 Study Population	✓		
1.3 Sampling Methodologies			
1.3.1 Random Samples	✓		
1.3.2 Stratified Random Sampling	✓		
1.3.3 Cluster Sampling		✓	
1.3.4 Systematic Sampling		✓	
1.3.5 Random Digit Dialing		✓	
1.3.6 Quota Sampling		✓	
1.3.7 Nonprobability Sampling	✓		
1.3.8 Choosing a Sampling Method	✓		
1.4 Determine the Size of the Sample			
1.4.1 Calculating Sample Statistics			
1.4.1.1 Margin of Error	✓		
1.4.1.2 Level of Confidence	✓		
1.4.1.3 Response Rate	✓		
1.4.1.4 Completion Rate	✓		
1.4.1.5 Sample Distribution	✓		

<b>III. STATISTICAL METHODS FOR MARKETING RESEARCH</b>			
1.4.2 The Effect of Sample Size on Precision	✓		
<b>2. Analyzing Research Data</b>			
2.1 Assessing the quality of the sample for making inferences back to a universe			
2.1.1 Expected or Known Biases	✓		
2.1.2 Weighting to Correct for Possible Biases (Advantages and Disadvantages of Weighting)	✓		
<b>2.2 Characteristics of Data</b>			
2.2.1 Types of Data			
2.2.1.1 Nominal, Ordinal, Interval and Ratio	✓		
2.2.1.2 Categorical vs. Continuous	✓		
2.2.2 Data Considerations for Analytical Procedures	✓		
<b>2.3 Tabulation of Research Data</b>			
2.3.1 Specifying a set of tables for preliminary analysis	✓		
2.3.2 Tables for specific hypotheses	✓		
<b>2.4 Measures of Central Tendency &amp; Dispersion</b>			
2.4.1 Mean	✓		
2.4.2 Median	✓		
2.4.3 Standard Deviation	✓		
2.4.4 Standard Error	✓		
2.4.5 Skewness		✓	
<b>2.5 Significance Testing and Strength of Relationships</b>			
2.5.1 Confidence Intervals boundaries for categorical and continuous data	✓		
2.5.2 Significant difference testing for categorical and continuous data	✓		
2.5.3 T-Tests	✓		
2.5.4 Chi Square	✓		
2.5.5 Correlation	✓		
<b>2.6 Multivariate Analysis</b>			
2.6.1 Multi-Dimensional Scaling		✓	
2.6.2 Correspondence Analysis		✓	



<b>III. STATISTICAL METHODS FOR MARKETING RESEARCH</b>			
2.6.3 Regression		✓	
2.6.4 Analysis of Variance		✓	
2.6.5 Discriminant Analysis		✓	
2.6.6 Factor Analysis		✓	
2.6.7 Cluster Analysis		✓	
2.6.8 Classification Tree Analysis		✓	
2.6.9 Conjoint and Discrete Choice Analysis		✓	
2.6.10 Structural Equation Modeling		✓	

<b>IV. QUESTIONNAIRE DESIGN</b>			
<p>This subject area sets out the topics related to the design of a survey instrument. Candidates are expected to possess, at the expectation level specified, knowledge of the questionnaire design concepts, practices and methods associated with each line item</p>			
	<b>A</b>	<b>B</b>	<b>C</b>
1. Questionnaire Types			
1.1 Range of Types	✓		
1.2 Advantages & Disadvantages	✓		
2. Questionnaire Components			
2.1 Questionnaire Sections	✓		
2.2 Typical Content of Each Section	✓		
3. Question Comprehension			
3.1 Survey Atmosphere	✓		
3.2 Respondent Understanding	✓		
3.3 Respondent Agendas	✓		
4. Question Sequencing			
4.1 Logical Flow	✓		
4.2 Psychological Flow	✓		
4.3 Question Order Effects	✓		

<b>IV. QUESTIONNAIRE DESIGN</b>			
5. Types of Questions			
5.1 Behavioural Measures	✓		
5.2 Attitudinal Measures	✓		
5.3 Open Ended	✓		
5.4 Hybrid	✓		
5.5 Closed Ended			
5.5.1 Dichotomous	✓		
5.5.2 Multiple Choice (multichotomous)			
5.5.2.1 Types	✓		
5.5.2.2 When to Use Prompted/Unprompted		✓	
5.5.2.3 When to Rotate or Not (primacy & recency effects)		✓	
5.5.3 Rating Scales			
5.5.3.1 Ranking		✓	
5.5.3.2 Likert Scale	✓		
5.5.3.3 Semantic-Differential Scale	✓		
5.5.3.4 Scale Design	✓		
6. Wording			
6.1 Effective Wording of Questions			
6.1.1 Clarity	✓		
6.1.2 Use of Specialized Terms	✓		
6.1.3 Neutral Questions	✓		
6.1.4 Behaviour questions	✓		
6.1.5 Personal or Private Questions	✓		
6.1.6 Question Involving Pride	✓		
6.1.7 Question Length	✓		
6.2 Wording to Avoid		✓	
7. Questionnaire Format			
7.1 Effective questionnaire format			
7.1.1 Self-Administered	✓		

<b>IV. QUESTIONNAIRE DESIGN</b>			
7.1.2 Interviewer-Administered	✓		
7.1.2.1 Show Cards	✓		
7.2 Formatting to avoid	✓		
8. Pre-Testing		✓	

<b>V. QUALITATIVE MARKETING RESEARCH</b>			
This subject area sets out the topics related to the use of qualitative marketing research. Candidates are expected to possess, at the expectation level specified, knowledge of the qualitative marketing research concepts, practices and methods associated with each line item			
	<b>A</b>	<b>B</b>	<b>C</b>
1. Qualitative Research			
1.1 Uses of Qualitative Research	✓		
1.2 Limitations	✓		
2. Types of Qualitative Research			
2.1 Focus Groups (Uses/Advantages/Disadvantages)	✓		
2.2 Dyads/Triads (Uses/Advantages/Disadvantages)		✓	
2.3 Mini Groups (Uses/Advantages/Disadvantages)		✓	
2.4 Mega Groups (Uses/Advantages/Disadvantages)		✓	
2.5 In-Depth Interviews (Uses/Advantages/Disadvantages)	✓		
2.6 Observational Techniques (Uses/Advantages/Disadvantages)	✓		
2.7 Impact of Technology			
2.7.1 Use of Interactive Devices	✓		
2.7.2 Telephone Groups	✓		
2.7.3 Internet Focus Groups	✓		
2.7.4 Long Distance Observation	✓		
3. Designing a Focus Group Study			
3.1 Group Composition	✓		
3.2 Geographic Location	✓		
3.3 Group Size	✓		

<b>V. QUALITATIVE MARKETING RESEARCH</b>			
3.4 Number of Groups	✓		
3.5 Recruitment	✓		
3.6 Screener questions			
3.6.1 Design	✓		
3.6.2 Purpose	✓		
3.7 Selection of Focus Group Types	✓		
3.8 Costing		✓	
3.9 Facilities (Features of a Good Facility)		✓	
3.10 Developing the Discussion Guide			
3.10.1 Purpose	✓		
3.10.2 Content	✓		
3.11 Moderators			
3.11.1 Role of the Moderator	✓		
3.11.2 Qualities of a Good Moderator	✓		
3.11.3 Special Considerations			
3.11.3.1 Gender		✓	
3.11.3.2 Ethnic Background		✓	
3.11.3.3 Age		✓	
3.11.3.4 Special Knowledge		✓	
3.11.4 Moderating Skills & Techniques			
3.11.4.1 Projective Techniques	✓		
3.11.4.2 Use of Stimuli	✓		
3.11.5 Group Dynamics vs. Group Interviewing	✓		
3.12 Role of Observers	✓		
4. Communicating the findings of Focus Groups			
4.1 Reporting Techniques	✓		
4.2 Cautions to Readers	✓		
4.3 Items that should not be included	✓		

## VI. Market Intelligence and Competitive Intelligence

This subject area sets out the topics related to the concepts, methods and process of understanding and implementing Market Intelligence (A), and, specifically, the distinct discipline of Competitive Intelligence (B). This knowledge requirement is relevant to Marketing Researchers in all areas of practice. Candidates are expected to possess, at the expectation level specified, knowledge of the Intelligence area and understanding of how to incorporate Market Intelligence with the other areas of Marketing Research practise.

<b>(A) MARKET INTELLIGENCE</b>	<b>A</b>	<b>B</b>	<b>C</b>
1. Defining Market Intelligence			
1.1 Role and purpose of Market Intelligence in business	✓		
1.2 Components of MI	✓		
1.3 Strategic and competitive reasons for using MI	✓		
1.4 MI's fit within Marketing Research	✓		
1.5 How to ensure effective MI		✓	
1.6 How MI is defined across business organizations	✓		
1.7 MI champion development, role & challenges			✓
2. MI Management			
2.1 Creating a MI culture in organizations			✓
2.2 Developing MI teams			
2.2.1 Roles to be included			✓
2.2.2 Skills and requirements			✓
2.3 Benefits of MI in organizations			✓
2.4 Users of MI and their individual needs			✓
2.5 Effective decision-making with MI			
2.5.1 Strategic decision making			✓
2.5.2 Tactical decision making			✓
2.5.3 Operational decision making			✓
2.6 Analyzing business environment situations and matching with intelligence needs		✓	

<b>VI. Market Intelligence and Competitive Intelligence</b>			
3. Market Intelligence Process			
3.1 Assessing information needs	✓		
3.2 Issues management and prioritization		✓	
3.3 Analyzing risk		✓	
3.4 Developing valid assumptions		✓	
3.5 Identifying constraints and how to handle them		✓	
4. Market Intelligence Logistics			
4.1 What MI looks like on the user's desk		✓	
4.2 How to communicate MI		✓	
4.3 Sources of MI information		✓	
4.4 Technical considerations			✓
4.5 Systems and software			✓
4.6 Tools used in MI – front end and back end			✓
4.7 Data warehousing			✓
4.8 Data mining, filtering and funnelling			✓
5. Environmental Scanning			
5.1 Macro environmental analysis			✓
5.2 Micro environmental analysis			✓
5.3 Market share			✓
5.4 Market size assessment			✓
5.5 Market saturation			✓
5.6 Situation and SWOT analyses		✓	
6. Internal information used in MI			
6.1 Customer information			
6.1.1 Customer relationship management information usage		✓	
6.1.2 Social media information		✓	
6.1.3 Loyalty and winback information		✓	

<b>VI. Market Intelligence and Competitive Intelligence</b>			
6.1.4 Customer segmentation and targeting information		✓	
7. External Information used in MI			
7.1 Competitive Intelligence	<i>(see section VI B)</i>		
7.2 Competitive Technical Intelligence			✓
7.3 Patents			✓
8. MI Metrics and Key Performance Indicators			
8.1 How to establish key metrics			✓
8.2 Setting and monitoring KPIs			✓
9. Information considerations			
9.1 How to ensure urgency, accuracy, relevance, currency, accessibility, sensitivity		✓	
9.2 Cost considerations		✓	
10. MI Tools and Techniques			
10.1 Trend analysis			✓
10.2 Predictive modeling			✓
10.3 Customer segmentation and valuation			✓
10.4 Dashboards			✓
10.5 Mapping and GIS systems			✓
10.6 Drill down techniques			✓
11. MI Reporting and Monitoring		✓	
<b>(B) COMPETITIVE INTELLIGENCE</b>	<b>A</b>	<b>B</b>	<b>C</b>
1. Understanding Competitive Intelligence			
1.1 Active versus Defensive CI		✓	
1.2 Commonalities and Differences Between CI and Market Research		✓	
1.3 Popular Applications - how organizations use CI and the benefits they get		✓	
1.4 Traditional versus Non traditional competitors		✓	

<b>VI. Market Intelligence and Competitive Intelligence</b>			
2. Ethics			
2.1 Understanding the Differences Between Ethical and Non Ethical Approaches	✓		
2.2 Guidelines for Employees to Follow	✓		
2.3 Guidelines for Suppliers to Follow	✓		
3. Sources			
3.1 Primary		✓	
3.2 Secondary		✓	
3.3 Social Media		✓	
3.4 Tips for Growing Your Network Of Sources		✓	
4. Eliciting Information			
4.1 How to Reach Credible Respondents		✓	
4.2 Tips for Listening, Questioning and Observing		✓	
5. Data Analytical Tools			
5.1 Blind Spot Analysis		✓	
5.2 Data Cell Screening		✓	
5.3 Predicting Techniques		✓	
5.4 Ratio Analysis		✓	
5.5 Win Loss Analysis		✓	
6. Reporting CI			
6.1 Achieving Accuracy - Weeding Out Misinformation, Conducting Verification Checks	✓		
6.2 Templates - In-Depth Assessment, Monthly Monitoring Scan, Quick Turn Around		✓	
6.3 CI Newsletter		✓	
6.4 Tips For Producing Effective Reports		✓	
7. Defensive CI (Preventing Sensitive & Confidential Information From Being Leaked)			
7.1 Understanding Types of Leakage - Accidental, Unintentional, Intentional, Malicious	✓		



<b>VI. Market Intelligence and Competitive Intelligence</b>			
7.2 Guidelines to Eliminate Leakage by Employees, Suppliers, Customers, Website	✓		
8. Setting Up Your CI program			
8.1 Tools To Conduct A Study - Brief, Instructions, Plan Of Attack, Respondent Database		✓	
8.2 How To...			
8.2.1 Conduct a CI Needs Assessment		✓	
8.2.2 Motivate Your Colleagues and Suppliers to Collect and Report CI		✓	
8.2.3 Set up a Database		✓	
8.2.4 Determine if You Need to Purchase CI Software and Which Software To Buy		✓	
8.2.5 Measure the Effectiveness of Your CI Efforts		✓	
9. Understanding Competitor Benchmarking			
9.1 Applications and Benefits		✓	
9.2 Sample Sizes		✓	
9.3 Survey Format		✓	
9.4 Report Formats		✓	
10. Understanding Mystery shopping			
10.1 Applications and Benefits		✓	
10.2 Types - Retail, High End Customer, B2B, Leakage		✓	
10.3 Channels – Call Centre, Onsite, E Support		✓	
10.4 Tips on Recruiting, Briefing and Debriefing Shoppers		✓	
10.5 Report Formats		✓	
11. Special Applications			
11.1 Public Sector CI			✓
11.2 Using CI to Assess New Markets			✓
11.3 War Gaming			✓

<b>VII. MARKETING MANAGEMENT</b>			
This subject area sets out the topics related to the management of marketing. Candidates are expected to possess, at the expectation level specified, knowledge of the marketing management concepts, practices and methods associated with each line item			
	<b>A</b>	<b>B</b>	<b>C</b>
1. Customer Behaviour			
1.1 Decision Making by End Consumers	✓		
1.2 Decision Making by Business Organizations	✓		
1.3 Source of Influence on Decision Making		✓	
2. Marketing Research			
2.1 Using Marketing Research	✓		
2.2 Developing Customer Insight from Data	✓		
3. Customer Focused Marketing			
3.1 Market Segmentation	✓		
3.2 Target Marketing	✓		
3.3 Product Positioning	✓		
4. The Marketing Mix			
4.1 The Product			
4.1.1 Understanding the Product	✓		
4.1.2 Branding	✓		
4.1.3 New Product Development		✓	
4.1.4 Product Mix Decisions		✓	
4.2 Marketing Communications			
4.2.1 Models of Communication	✓		
4.2.2 Marketing Communications Methods		✓	
4.2.3 Advertising Planning		✓	
4.3 Price			
4.3.1 Variables used in pricing decisions		✓	

<b>VII. MARKETING MANAGEMENT</b>			
4.3.2 Pricing Strategies		✓	
4.4 Channels of Distribution			
4.4.1 Variables in Channel Decisions		✓	
4.4.2 Channel Strategies		✓	
5. Marketing Strategy			
5.1 Elements of Strategy Formation	✓		
5.2 Deliberate vs. Emergent Strategies	✓		
5.3 Evaluating Core Competencies	✓		