

# Foundations of Marketing Planning

IB Business Management 4.2 Marketing Planning | Trimester Assessment Worksheet

<b>Worksheet</b>	01 of 12
<b>Recommended time</b>	45 to 55 minutes
<b>Total marks</b>	35
<b>Question types</b>	Multiple choice, short answer, data response / case study, extended response
<b>Focus</b>	Role of marketing planning, main elements of a marketing plan, research, objectives, budget and links with other functions.
<b>Note</b>	Original IB-style practice resource. Full answer key and marking guidance included at the end.

## Student details

Name: \_\_\_\_\_ Class: \_\_\_\_\_ Date: \_\_\_\_\_

## Instructions

Answer all questions. Use the case data where appropriate. Show clear reasoning in 4-mark, 6-mark and 10-mark responses. The answer key appears after the question pages.

## Section A - Multiple choice [5 marks]

- Which option best describes a marketing plan? [1]
  - A forecast of production costs only
  - A document setting out objectives, strategy, budget and activities for marketing
  - A record of past sales only
  - A list of all competitors in the market
- Which statement about market research in planning is most accurate? [1]
  - It is only needed after a product launch
  - It helps decisions become more evidence-based
  - It replaces the need for marketing objectives
  - It is only useful in mass markets
- The marketing planning process usually begins with: [1]
  - Setting the price
  - A marketing audit and market analysis
  - Recruiting extra staff
  - Launching promotions immediately
- Why might a marketing plan need to be amended after launch? [1]
  - Because marketing plans are never linked to objectives
  - Because customers, competitors and the environment can change
  - Because research becomes illegal
  - Because all plans are confidential
- Which business function is most likely to use the sales forecast from a marketing plan to set output targets? [1]
  - Operations
  - Finance
  - Human resources
  - Procurement only

## Section B - Short answer [8 marks]

6. Define the term marketing plan. [2]

---

---

7. State two elements that are commonly included in a marketing plan. [2]

---

---

8. Explain one benefit to a business of carrying out marketing planning before a product launch. [4]

---

---

---

---

### Section C - Data response / case study [12 marks]

#### Case study - Lumina Tea

Lumina Tea is a small beverage start-up preparing to launch a low-sugar bottled herbal tea aimed at gym users and university students. Market research suggests strong interest in healthier drinks and in recyclable packaging. Managers have drafted the following launch information.

Planned item	Details
Objective	Sell 90,000 bottles in the first 12 months and reach 250 outlets.
Promotion budget	\$110,000 for digital promotion, \$45,000 for sampling and \$25,000 for packaging redesign.
Operations capacity	Current filling capacity is 7,000 bottles per month.
Finance constraint	Cash available for launch activities is capped at \$210,000.
HR implication	Six part-time promoters may be recruited for the first eight weeks.

9. Identify two parts of Lumina Tea's marketing plan shown in the case. [2]

---

---

10. Explain one way Lumina Tea's marketing plan will influence another business function. [4]

---

---

---

11. Analyse why Lumina Tea should continue market research after launch rather than rely only on the original plan. [6]

---

---

---

---

---

### Section D - Extended response [10 marks]

12. Discuss whether detailed marketing planning is always worth the time and cost for a small business. [10]

Answer in continuous prose. Use relevant concepts, case/context references and a supported judgement.

---

---

---

---

---

---

---

---

# Answer Key and Marking Guidance - Worksheet 01

## Foundations of Marketing Planning

### Markscheme note

These are original IB-style practice markschemes. Award credit for any other valid, well-applied response. For 4-mark questions, credit explained points. For 6-mark questions, reward developed chains of reasoning. For 10-mark questions, use the level descriptors and reward a supported judgement.

## Section A answers

Q	Answer	Brief rationale
1	B	A marketing plan is forward-looking and normally combines objectives, strategy, budget and planned activities.
2	B	Research should inform planning decisions by providing data on customers, competition and channels.
3	B	Planning usually begins with an audit of the current situation and the market.
4	B	Plans must be reviewed because market conditions and business capabilities can change.
5	A	Operations relies on expected sales to decide volumes and capacity needs.

## Open-response markscheme

### Question 6 [2]

**Indicative answer:** A marketing plan is a document that sets out the marketing objectives, marketing strategy, budget and activities needed to achieve the objectives.

**Marking guidance:** Award 1 mark for a partial idea and 2 marks for a clear, accurate definition including both purpose and content.

### Question 7 [2]

**Indicative answer:** Any two of: executive summary; market analysis; target market; marketing objectives; marketing strategy; marketing budget; resources required; activity timetable; responsibilities.

**Marking guidance:** Award 1 mark per valid element, up to 2 marks.

### Question 8 [4]

**Indicative answer:** One benefit is better coordination. A plan sets clear objectives, budgets and responsibilities, so the business can align production, staffing and finance with the intended launch. This reduces wasted spending and makes it easier to monitor progress and correct problems early.

**Marking guidance:** Award up to 2 marks for identifying the benefit and up to 2 additional marks for linked explanation and business impact.

### Question 9 [2]

**Indicative answer:** Any two of: marketing objective; marketing budget; resources required; staffing implications; implementation activity such as sampling; market research evidence.

**Marking guidance:** Award 1 mark per valid part identified, up to 2 marks.

### Question 10 [4]

**Indicative answer:** The plan will influence operations because the sales objective and sampling activity affect how many bottles must be produced. If promotion succeeds, output may need to rise above current monthly capacity, so operations may need overtime, extra shifts or investment. Equally, HR may need to recruit and train temporary promoters mentioned in the plan.

**Marking guidance:** Award up to 2 marks for identifying a relevant cross-functional link and up to 2 marks for explaining its significance.

### Question 11 [6]

**Indicative answer:** Original research is only a snapshot. After launch, customer response, repeat purchase rates, competitor reactions and channel performance may differ from what was expected. Continuing research allows Lumina Tea to see whether students and gym users are actually buying, whether the packaging and price are working, and whether the sampling campaign is cost-effective. This helps managers revise the plan, redirect spending and prevent the business from persisting with a weak strategy.

**Marking guidance:** Reward a developed chain of reasoning that links updated research to improved decisions, resource use and performance.

Marks	Descriptor
1-2	Basic understanding with limited explanation.
3-4	Some application and analysis, but development is partial.
5-6	Developed, relevant analysis linked clearly to the case or context.

### Question 12 [10]

**Indicative answer:** Indicative content: detailed plans can improve coordination, clarify objectives, control budgets, reduce risk and make progress measurable; small firms often have scarce resources so planning may prevent expensive mistakes; however, small firms may operate in fast-changing markets where long plans become outdated quickly; planning also has time and data costs; very small firms may need a leaner, flexible plan rather than a highly detailed document; the best answer should weigh structure against flexibility and reach a judgement about when detailed planning adds enough value.

**Marking guidance:** Use the 10-mark rubric. Reward balanced discussion and a supported judgement about circumstances.

Marks	Descriptor
1-2	Limited relevant knowledge; response is mostly descriptive or generic.
3-4	Some understanding and some application, but analysis is thin or uneven.
5-6	Clear understanding with relevant application and some developed analysis.
7-8	Good analysis with balanced discussion of benefits and limitations.
9-10	Well-developed, well-applied evaluation with a supported judgement or recommendation.