

Marketing Executive L4 Apprenticeship Standard

End-Point Assessment Plan (ST0596)

May 2018

2. Introduction and Overview

The Marketing Executive apprenticeship is designed to develop the professional standard required of people working in Marketing Executive roles in organisations across the private, public and third sectors. The Marketing Trailblazer Group made up of small, medium and large employers has developed the standard and this end-point assessment plan. The Trailblazer received backing and support from the Chartered Institute of Marketing (CIM), with additional support coming from other stakeholders such as Training Providers and Universities. This document sets out the requirements for end-point assessment (EPA) for this apprenticeship standard. It will be of interest to apprentices and their employers, training providers and end-point assessment organisations.

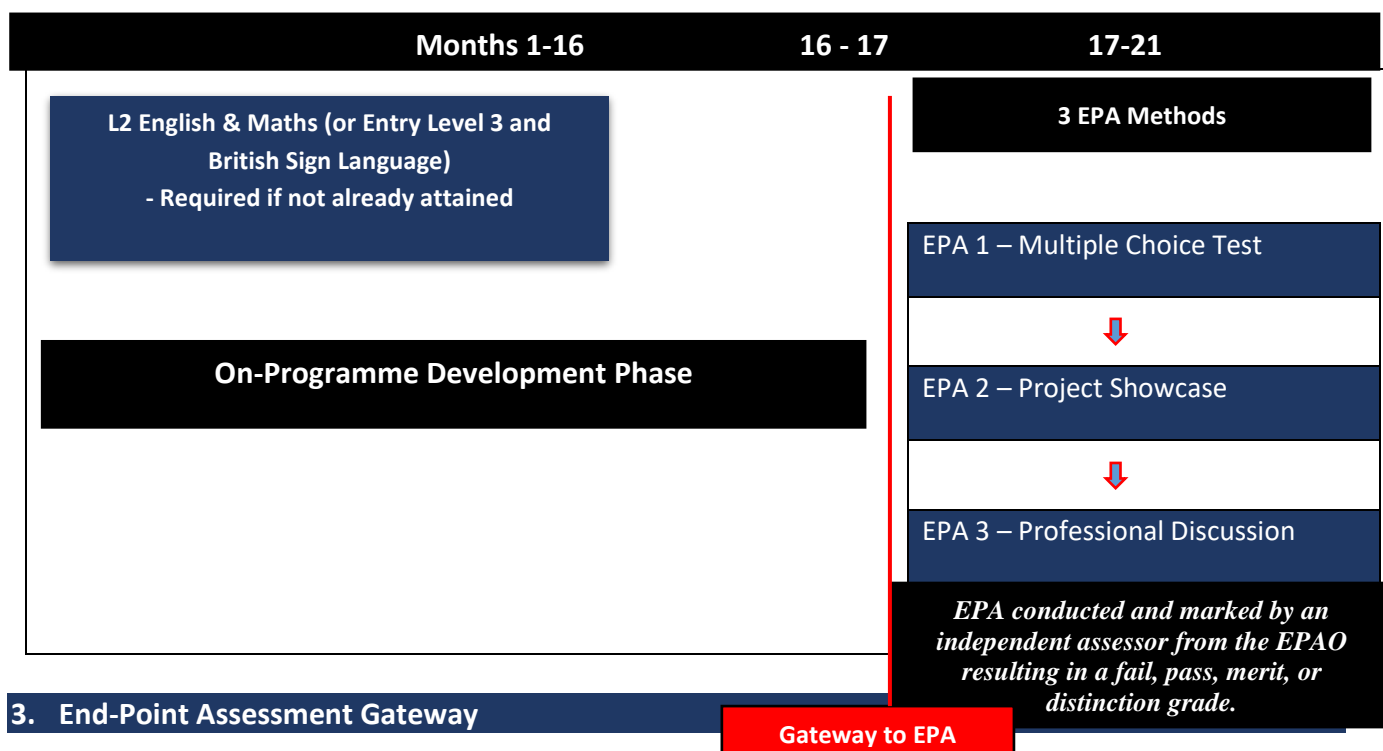
Full time apprentices will typically spend around 16 months on-programme working towards the apprenticeship standard, with a minimum of 20% off-the-job training. Performance in the EPA will determine the apprenticeship grade of fail, pass, merit or distinction.

The EPA should only start once the employer is satisfied that the requirements for EPA have been met and can be evidenced to an EPA organisation, and that the apprentice is consistently working at or above the level set out in the standard. The EPA will typically be completed within a 5 month period, with a maximum total assessment time of 7 months permissible to account for any re-sits/re-takes that are agreed.

EPA must be conducted by an organisation approved to offer services against this standard, as selected by the employer, from the Education & Skills Funding Agency's Register of End-Point Assessment Organisations (RoEPAO).

The EPA consists of 3 distinct assessment methods:

- Multiple Choice Knowledge Test
- Project Showcase
- Professional Discussion

Diagram 1 – Example of On-Programme and EPA Timescales

The EPA should only start once the employer is satisfied that all requirements for EPA have been met and can be evidenced to an end-point assessment organisation; and that the apprentice is consistently working at or above the level set out in the standard. Employers may wish to take advice from their apprentice’s training provider.

Apprentices without English and mathematics at level 2 must achieve level 2 prior to taking their EPA. For those with an education, health and care plan or a legacy statement the apprenticeships English and maths minimum requirement is Entry Level 3, and British Sign Language qualifications are an alternative to English qualifications for those whom this is their primary language.

The apprentice’s project plan for the Project Showcase should also be discussed and agreed at EPA gateway by the apprentice and their line manager. A short Project plan summary should then be submitted to the EPAO for approval to ensure comparability of level of demand and scope with other projects. The EPAO will provide a one page template for submission of the project plan summary – which should be a maximum of 350 words. The EPAO will notify the employer within 7 working days of receipt that the project is acceptable.

Submission of the project plan summary will also act as notification of the apprentice entering the EPA to aid planning and delivery.

4. End Point Assessment – Methods, Timescales and Location

3.1 End-point Assessment Methods

The apprentice will be assessed against the apprenticeship standard using **three** complementary end-point assessment (EPA) methods. The assessment is synoptic, i.e. takes a view of the overall performance of the apprentice in their job and will take up to 5 months to complete following the gateway.

The assessment process is made up of 3 distinct assessment methods:

1. **EPA 1: Multiple Choice Test (MCT)** - 90 minute Online Knowledge MCT (see S3.2). The MCT should be taken during the EPA period prior to Project Showcase's Presentation with Q&A component and EPA 2.
2. **EPA 2: Project Showcase** – This method combines 3 components – a Project Report, a Presentation and a Q&A, the purpose of which are to showcase the apprentices' work-based project, and these are marked and awarded a grade. The project report will be submitted to the EPAO for remote assessment prior to the 10 minute Presentation and 20 minute Question and Answer (see S3.2)
3. **EPA 3 – Professional Discussion** - 50 minute discussion between the apprentice and Independent Assessor (see S3.3)

The apprentice will not pass through to Project Showcase's Presentation and Q&A or the Professional Discussion if they have not achieved a pass grade for the MCT and met the fundamental pass criteria specified in Annex B (S.1) for the Project Report component of EPA2. The End-Point Assessment Organisation (EPAO) will inform the employer, apprentice and training provider if this is the case within 10 days of taking the MCT and within 10 days from receipt of the Project Report. The Presentation and Q&A components of EPA 2, and EPA 3 (the Professional Discussion) will take place on the same day either face to face (at the apprentice's place of work or venue operated/approved by the EPAO) or using video technology (e.g. video-conferencing or Skype). EPA 3 should take place last. The apprentice will be informed of their grades for each method and overall on completion of their EPA once marking and moderation are complete. See section 4.3 for criteria for re-sits/re-takes.

3.2 EPA1: Multiple Choice Test (MCT)

The MCT is designed to test the apprentice's underpinning knowledge as defined in the standard and Annex A. If the apprentice does not pass the MCT they will not progress onto the other stages of the EPA. The EPAO will notify the employer if this is the case, and the Re-sit criteria laid out in section 4.3 will apply.

Requirements for the MCT:

- Apprentices have a maximum of 90 minutes to complete the test consisting of knowledge-based questions
- The MCT will be designed to cover the knowledge contained within the standard and a range of questions will be used to test that. Questions should allow for 50 marks to be awarded in total and should cover all areas of knowledge mapped to this assessment method in Annex A
- The MCT will be made up of 50 single answer responses each worth one mark (with 4 answer options for each)
- The MCT is closed book i.e. the apprentice can't refer to reference books or materials
- Delivered online and marked by the EPAO. The results of the test should be made available to the EPAO only, for distribution to the apprentice prior to EPAs 2 and 3. If the apprentice fails the MCT they will not be able to progress to the other stages of EPA.
- Conducted in examination conditions, requiring invigilation of 1 per 30 apprentices, but this may be delivered at the apprentice's workplace or provider location as long as the conditions meet the exam conditions defined by the EPAO (i.e. a quiet room, free from distraction and influence, invigilators with no prior involvement with apprentices). Alternative solutions to invigilation that achieve the same requirements can also be utilised to increase cost effective delivery e.g. online invigilation systems that ensures that the opportunity to manipulate learner's results is still eliminated.
- Questions must be determined and standardised by EPAOs.
- The question bank for the MCT should be reviewed and refreshed every 12 months (to avoid apprentice familiarity with the questions and to ensure they are up to date e.g. in terms of things such as marketing practice/legislation/regulation). EPAOs must develop and maintain a knowledge test question bank of sufficient size to prevent predictability.

3.3 EPA 2: Project Showcase

The Project Showcase has three marked components (the Project Report, Presentation and Q&A) that together should evidence the Knowledge, Skills and Behaviours (KSBs) mapped to this assessment method in Annex A. The Project Showcase is based upon a Work based project which is undertaken by the apprentice during the EPA period.

The Work based project will be a substantive piece of work, requiring the apprentice to demonstrate their Marketing skills through the actual delivery of a marketing activity appropriate to the role of a Marketing Executive. The approach to this marketing activity should be based upon a recognised planning framework. The project will be a real activity done in the role, and should demonstrate the aspects of the standard mapped to this method in Annex A.

The EPAO will provide appropriate guidance/criteria and templates to support production of the Work based project. Employers, with the support of their training provider, if requested, will use this project guidance/criteria to support the apprentice to develop the project plan at the EPA gateway, which is then submitted to the EPAO for approval (as described above).

The Work based project should:

- Be the delivery of a specific marketing project, activity, event or campaign
- Examples of this could include:
 - Marketing campaign to support an existing product or service or promote a launch.
 - Event or series of events such as a conference, training session/s or celebratory event.
- The chosen project should be within the remit of the apprentice's role, and should be his or her own work
- Be based on a real business requirement (i.e. not simulated) to best test competence.

Project Showcase - Project Report Component

The Apprentice will be given 4 months after the gateway to complete the defined marketing activity and the resulting project report. The Project report should take the form of a formal business report of 3500 words (+/- 10%), not including annexes, tables, and charts.

The Project Report should demonstrate how they delivered the marketing activity from planning, research, delivery, evaluation and reflection, including describing how the apprentice:

- Defined the project context, the apprentice's responsibilities, action taken by the apprentice (planning, research, execution and evaluation) and results
- Analysed the external and internal factors which may influence the project
- Set objectives to direct the project and measure success upon completion.
- Made decisions and chose options – providing reasons for their decisions, for example by using underpinning marketing theories, information, evidence, market research
- Worked and communicated with stakeholders to develop and deliver the activity/project
- Evaluated the outcomes of the marketing activity – understanding and reflecting on what worked well, any benefits, and lessons learned for next time (these may only be early indicators due to length of project)
- Carried out the project within an agreed set of parameters e.g. time, budget.

The Project report should include annexes, which provide evidence of how the project was delivered and the outcomes achieved e.g. relevant emails or client/stakeholder/manager feedback, marketing materials/content produced, press releases, web analytics, other marketing tools used. This list is not definitive and other evidence sources are permissible. The report annexes must contain a maximum of 10 pieces of evidence relating to the project, and a minimum of 8. The evidence must be attributable to the apprentice, in part or in full. Evidence must be accompanied by a statement outlining the apprentice's contribution, signed by the apprentice and their employer. The annex must include a mapping of the evidence to the KSBs assessed by the Project Report.

The Project Report will be sent by the employer to the EPAO to be marked remotely by the EPAO's Independent Assessor (IA). This should be at least 4 weeks before the end of the initial 5 month period allocated for the EPA. This will allow the IA sufficient time to assess the Project Report against the assessment criteria in Annex B. If the apprentice does not meet the minimum pass criteria for the Project Showcase's Project Report component of this method they will not progress onto the Project

Showcase's Presentation with Q&A, nor EPA 2, the Professional Discussion. The EPAO will notify the employer if this is the case, and the Re-sit/Re-take criteria laid out in section 4.3 will apply.

Project Showcase - **Presentation and Q&A Components**

EPAOs must schedule the Presentation and Q&A components to take place within 3 weeks of submission of the Project Report to the EPAO and within the maximum 5 month EPA period, giving an apprentice a minimum of 2 weeks' notice of the time, date and venue.

The presentation with questioning must take place on a one-to-one basis in a single session between an independent assessor and the apprentice; this may be delivered using technology such as video-conferencing.

Prior to the presentation and Q&A, the independent assessor (IA) must have reviewed and assessed the apprentice's Project Report against the criteria in Annex A and B, and prepared questions for the Q&A. These questions can be built on and modified to take account of the presentation evidence. The EPAO should provide guidance and sample questions for the IAs on this.

The focus of the 10-minute (+/-10%) presentation is for the apprentice to give an evaluation of their work and progress during the project. The presentation should give a competency-based example demonstrating each of the following:

1. How they developed a marketing skill during delivery the project
2. How they will change their future performance or delivery based on learnings from delivery of the project.

The presentation should aim to evidence the Knowledge, Skills and Behaviours (KSBs) mapped to this method in Annex A.

It is left to the apprentice to use their creativity to select the most appropriate delivery aides and method/s for their presentation. For example apprentices can use presentation aides such as power point, video clips, flip chart, work products, notes. EPAOs must ensure any reasonable presentational requirements are in place e.g. power-point facilities; apprentices must make any requirement requests at least one week prior to the scheduled date for the presentation and Q&A.

The IA will not only assess the content of the presentation but also the delivery and communication skills (as required in the standard).

The presentation will be followed by a 20 minute (+/-10%) Q&A session with the IA, this will allow the IA to further discuss and test elements of their presentation. It will also test any areas of the Work based project highlighted by the IA during assessment of the project report as needing further investigation/testing and seek to explore any KSBs mapped to this assessment method that are yet to be evidenced. The independent assessor must ask the apprentice 5-7 open questions; follow up questions are allowed to seek clarification. Questions must seek to assess KSBs mapped to this

method not evidenced through the project report and presentation, and/or depth of understanding to assess performance against the distinction criteria. Apprentices may refer to their project report, evidence contained with the project report annexes, presentation or presentation aides when answering the questions.

EPAOs must produce sample questions and guidance on the Q&A for independent assessors. The presentation and questioning should be video recorded, subject to the apprentice's agreement; where permission is not given, or special considerations apply, it is permissible for another independent assessor to be present to document evidence presented. Independent assessors must holistically assess the Project Showcase using the grading criteria in Annex B.

If the apprentice does not pass the Presentation with Q&A component they are still able to progress onto the Professional Discussion.

3.4 EPA 2 - Professional Discussion

The Professional Discussion will conclude the end point assessment process. Over the course of 50 minutes (+/-10%) the IA will assess the candidate's knowledge, skills and behaviours (KSBs) that are mapped to this method in Annex A. The IA will typically ask 4 competency-based questions (e.g. asking for examples of...) enabling the apprentice to explain how KSBs were personally achieved in role, and 4 scenario-based questions (e.g. asking for their response in/to a certain professional situation, how would you deal with.... what would you do if...). The IA can ask follow-up questions for clarification - to elicit further evidence that the KSBs have been attained, or otherwise, and to enable accurate assessment against the pass/distinction criteria. The Professional Discussion will particularly provide the apprentice with an opportunity to evidence the Behaviours in the standard as mapped to this assessment method Annex A.

A structured brief and question bank will be developed by the EPAO, and they will provide their IAs with training and CPD in the art of professional discussions and reaching consistent judgements. The question bank should cover the areas of competence mapped to this method in Annex A and should be reviewed and refreshed every 12 months (to avoid apprentice familiarity with the questions and to ensure they are up to date e.g. in terms of things such as marketing practice/legislation/regulation). EPAOs must develop and maintain a knowledge test question bank of sufficient size to prevent predictability

4. Grading the End-point Assessment

4.1 Final Grading

The apprenticeship for Marketing Executive has **four** possible **overall grades**: fail, pass, merit and distinction.

However independent assessors must individually grade each assessment method only against the criteria for a fail, pass or distinction, according to the grading criteria set out below and in Annex B. No restrictions on grading apply where apprentices re-sit/re-take an assessment method – see re-sit section below.

In the event of an appeal against the grade awarded, the EPAO will carry out a further review of the evidence to confirm or modify the grade in line with their standard procedures.

The IA will make the judgment on the grade to be awarded to the apprentice, for each individual assessment method against the criteria in Annex B for Fail, Pass or Distinction. These individual grades are then weighted and combined as described below to reach the overall apprenticeship grade of fail, pass, merit or distinction

An apprenticeship **pass** represents full competence against the standard i.e. fully competent in the role as described in the standard and Annex A.

A premium has been placed on the Project Showcase due to the importance of this method and the number of KSBs mapped to it; meaning distinction must be achieved here for merit or distinction to be applied overall.

The grade of **distinction** is to recognise apprentices who are outstanding Marketing Executives who consistently demonstrate they have excelled in application of the knowledge, skills and behaviours to the benefit of their organisation, having achieved a distinction grade in all three of the assessment methods.

In addition, the grade of **merit** will be awarded to recognise apprentices who achieved a distinction in their Project Showcase (on which a premium is placed), and one other assessment method, and a pass grade in the third.

The final apprenticeship grade is based on performance across the 3 assessment methods. An independent assessor must combine the grades of the three assessment methods to determine the EPA grade. The **overall grade** is based on the following principles:

- To achieve **pass grade overall** the apprentice must achieve a **pass** in **all three of the** end-point assessment methods.
- To achieve **merit grade overall** the apprentice must achieve a **distinction** in the Project Showcase **and one other** assessment method
- To achieve **distinction grade overall** the apprentice must achieve a **Distinction** in **all three** end-point assessment methods.

Where more than one independent assessor is involved, the independent assessor responsible for the assessment method completed last will be responsible for combining the grades.

Independent assessors' decisions must be subject to moderation procedures by the EPAO – see internal quality assurance section below. Decisions must not be confirmed until after moderation.

For the avoidance of doubt this equates to the following when calculating the overall apprenticeship grade:

| MCT Grade | Project Showcase Grade | Professional Discussion Grade | Overall Grade |
|-----------------------------------|------------------------|-------------------------------|--------------------|
| Fail in one method or more | | | Fail |
| Pass | Pass | Pass | Pass |
| Distinction | Pass | Pass | Pass |
| Pass | Distinction | Pass | Pass |
| Pass | Pass | Distinction | Pass |
| Distinction | Pass | Distinction | Pass |
| Distinction | Distinction | Pass | Merit |
| Pass | Distinction | Distinction | Merit |
| Distinction | Distinction | Distinction | Distinction |

4.2 Grading Criteria (refer to Annex B)

The detailed tables in **Annex B** show the grading criteria used to determine the individual grades for each of the EPA methods. It provides criteria for fail, pass and distinction, which the EPAO should use to develop the marking structure to deliver the Final Grading outcomes detailed above.

4.3 Re-sits/Re-takes of EPA

Apprentices that fail one or more EPA method will have the opportunity to re-sit. Re-sits are not to be offered to apprentices wishing to move up to a higher apprentice grade. Re-sits/re-takes can take the apprenticeship up to 2 months over the initial 5 months allocated for EPA – therefore a total permissible EPA time is 7 months.

Re-sits of the EPA methods are permissible based on the following criteria:

- In all cases the apprentice's employer will need to agree that a re-sit/re-take is the appropriate course of action and it is the employer's decision as to how many resits/takes are permitted, based on the criteria below
- A re-sit does not require further learning, whereas a re-take does
- All re-sits/re-takes will still be graded fail/pass/distinction (so no limit to grades on re-sit/re-takes) and combined with the grades for the other assessment methods to determine the EPA

grade as per grading procedure described above.

- Apprentices should have a supportive action plan to prepare for the re-sit or re-takes
- **MCT:** If the apprentice fails the MCT they will not progress to the other stages of the EPA until a pass grade is achieved
- **Project Showcase:** If the Project Report component of the Project Showcase does not meet the fundamental criteria in Annex B (S1.1) they will not progress to the Presentation with Q&A component of this method, nor the Professional Discussion. Apprentices are able to improve their project report and formally re-submit this to the EPAO (to be clear this should be based on the same work based project). If the apprentice fails the Presentation with Q&A component of the Project Showcase they are permitted to re-sit this.
- **Professional Discussion:** If the apprentice fails the Professional Discussion they are permitted to re-sit this.
- EPAOs must ensure that apprentices complete a different MCT and receive different questions in the Project Showcase's Q&A and for the professional discussion when taking a re-sits/re-takes.
- Where it is considered that further learning is required, or a different project needs to be undertaken for an apprentice to pass the apprenticeship it will be a matter for the employer to decide if this is the appropriate course of action

5. End-point Assessment Organisations (EPAOs)

5.1 EPAO Criteria

Employers must choose an independent EPAO approved to deliver the EPA for this apprenticeship from the Education & Skills Funding Agency's (ESFAs) Register of End-Point Assessment Organisations (RoEPAO). The responsibility for developing and delivering the end-point assessment rests with the independent End-Point Assessment Organisations (EPAOs) that are approved to offer their services to employers for the Marketing Executive standard.

EPAOs approved to operate the Marketing Executive end-point assessments must as a minimum:

- Develop and provide all required material and resources required for the EPA (i.e. Multiple choice test question bank, multiple choice test drawn from the question bank, multiple choice test Instruction script, project criteria and guidance, presentation & questioning guide, sample questions for the Q&A, professional discussion question bank and guidance, assessment recording documentation).
- On receipt of notification from employer and/or training provider that an apprentice has passed the gateway, should contact the employer and arrange dates, times and locations for the required EPA.
- Ensure all required material is present at the EPA venue.
- Provide appropriate and qualified staff to enable completion of all aspects of the EPA. This includes the provision of independent invigilators as required for the MCT.

- Confirm result of EPA to apprentice and employer.
- Arrange for certification.
- Maintain robust internal quality assurance procedures and moderation – including those defined in section 7 below
- Support as requested the activities of the nominated external quality assurance body.
- Have experience of development and design of assessments
- Provide evidence of working with or have the potential to train and develop a field force of Independent Assessors that meet the requirements specified in Section 4.2 below
- Provide evidence of IT infrastructure and/or on line facilities for the secure collection of learner data for the purpose of registration and the process for applying for end assessment appointments
- Ensure sufficient geographical coverage of their services (may be supported through use of technology).
- Ensure appropriate safeguards in place to avoid cheating

5.2 Independent Assessors

EPAOs must appoint Independent Assessors (IAs) with:

- At least 4 years' experience of working at at least one level above the apprenticeship within the Marketing profession
- Breadth of experience that covers the standard and must maintain the currency of their skills, knowledge and behaviours via evidenced continuous professional development (CPD)
- A relevant marketing qualification at least at the equivalent level to the apprenticeship.

IAs will be required to attend at least 2 full days of continuing professional development (CPD) and training each year as a minimum requirement of their role. IAs must have no connection with the apprentice and the apprentice's employer or training provider. The EPAOs will coordinate the IAs across the regions and ensure their independence and suitability of the role.

6. Professional Body Recognition

This apprenticeship is designed to prepare successful apprentices to meet the requirements for registration as an Affiliate Member with the Chartered Institute of Marketing (CIM).

7. Internal and External Quality Assurance

7.1 Internal Quality Assurance (IQA)

The responsibility for the robustness and IQA of the EPA process is held by the End-Point Assessment Organisation (EPAO). The EPAO will provide robust validation and quality assurance processes to ensure that all assessments are robust, that they assess fully against the Standard and are undertaken consistently and to the same standard.

The overall IQA responsibilities required of the EPAO are summarised below:

- Ensures there are robust processes in place to deliver assessments to the required standard, and that they are appropriate for the sector
- Trains and certifies all individual assessors to be able to assess consistently against the Standard and ensure they have the requisite skills and industry experience
- Applies robust quality assurance processes to the assessments this should include moderation of assessors work on a sampling basis. This should be risk based, with a minimum of 50% of each IAs work reviewed for the first 12 months of an EPAO's delivery to ensure consistency and quality in this initial period. With a reduction of required sampling as delivery establishes, a normal rate set at a minimum of 20%. The minimum 50% moderation should also apply to new IAs, whose work should be more heavily moderated for the first 6 months of their work, before being sampled at usual 20% minimum levels following that (as long as no issues have arisen in the first 6 months). Reviews of IAs work should include a moderator reviewing the marking and grading of each component, but also observations of Professional Discussions and Q&As. Moderation of scoring should be applied as needed based on those reviews.
- Runs the appeal process for any appeals that arise from grading decisions
- Reports to the Employers on any issues that arise
- Organises twice yearly update and training events for its assessors to ensure a consistent and comparable approach to the end point assessment. – the events will provide updates and training as required in EPA processes, guidance and tools, provide an opportunity to share and develop good practice
- Develops and maintains a set of Assessment Tools that are used by all to carry out assessments, detailed.
- Provides information and other requirements requested by the External Quality Assurance body.
- Seeks feedback from employers, apprentices and training providers in order to shape future service improvements.

7.2 Assessment Tools and Materials

The EPAO will also be responsible for creating and then maintaining the required Assessment Tools, to ensure continuing robustness (independent, consistent, accurate). It is recommended that EPAOs develop assessment tools in consultation with representative employers; where they do this they must put measures in place to ensure question security. The assessment methods are designed to produce assessment outcomes that are consistent and reliable, allowing fair and proper comparison between apprentices employed in different types and sizes of organisations. At the core of this will be the set of Assessment Tools that are used by all assessors for that EPAO. The EPAO will be

responsible for creating and maintaining the tools, guidance, materials and techniques to be used in the assessments to support the delivery of the EPA defined in this Plan. These tools should include:

- The full assessment criteria based on the defined learning outcomes;
- The detailed scoring and grading mechanism for each of the assessment methods, and the overall apprenticeship, based on the grading criteria set out in this plan;
- Clear guidance for conducting the Professional Discussion and Q&A;
- Full criteria and guidance for projects based on the criteria given in this plan.
- A short template for submission of the initial project plan to the EPAO
- MCT Knowledge test question bank as defined above
- Professional Discussion question bank as defined above
- Example questions for the Q&A component of the Project Showcase
- Documentation for recording assessment evidence and decisions
- Guidance for independent assessors on conducting the EPA
- Guidance for apprentices, their employers and training providers on the EPA

All assessors will be required to have the skills and experience outlined in section 5.2. They will be trained and approved by the EPAO to ensure that they are capable of using the tools developed for assessment in a fair and consistent manner to make reliable judgments. Immediate and appropriate action will be taken where any quality concerns are identified. EPAOs should also ensure processes and resources are in place to allow equity of access to the EPA for those with special requirements.

7.2 External Quality Assurance

External quality assurance arrangements will ensure that EPA organisations delivering EPA for this apprenticeship operate consistently and in line with this plan. External Quality Assurance for this apprenticeship standard will be undertaken by the Institute for Apprenticeships (IFA).

8. Implementation

8.1 Affordability

The cost of the end-point assessment will be no more than 20% of the maximum funding band for this apprenticeship, which is set at xxxx.

The flexibility and affordability built into this assessment model is critical to its ability to cater for all types and sizes of business. Employers have the opportunity to design a programme with their training provider that meets the requirements of the standard but delivered in way that suits their business' requirements. Employers also have the option to optimise the amount of support required from the training provider. This can be discussed and tailored (utilising the training provider's expertise) during contract discussions.

The following factors should ensure the EPA is affordable:

- Employer and/or training provider premises should be used for EPA venues where possible and alternative invigilation arrangements such as on-line invigilation systems may be used
- Remote assessment is permissible (e.g. video-conferencing to conduct the Presentation, Q&A and Professional Discussion), reducing travel costs
- The Work Based project is based on real work completed for the apprentices employer, adding value to the employer
- The Work Based Project should be submitted online

8.2 Volumes

The Marketing apprenticeship is expected to attract 50-100 starts in 2018/19, with a target of 200 starts during 2019/20, further delivery is expected to grow as the apprenticeship embeds, and delivery is established, with numbers estimated at around 1500 per annum.

Annex A - Knowledge, Skills and Behaviour Mapping to Assessment Methods

A Marketing Executive will work in a wide range of organisations including private, public and third sector and must demonstrate the core knowledge, skills and behaviours detailed below. The Methods of Assessment Grid shows which of the assessment methods are expected to demonstrate competence in each of the defined KSBs of the standard. The KSBs mapped to the Project Showcase will be assessed holistically across both components with one grade awarded. However to aid consistency, enable apprentices to focus their efforts, and support IAs to better assess the different components of the Project Showcase, KSBs have a primary and secondary component indicated (primary shaded in light blue below). So the primary component indicated is more likely to be where that KSB is evidenced. It is also expected that the apprentice's knowledge will be tested via MCT, but also demonstrate practical understanding/application in the second method mapped to that area of knowledge.

| Title | Method | Key |
|-------------------------|--|---------------|
| Multiple Choice Test | Online MCT to test knowledge | MCT |
| Project Showcase | - Project report based on the delivery of specific marketing project, activity, event or campaign - 10 Minute Presentation - 20 Minute Q&A | PR PQA |
| Professional Discussion | 50 Minute competency based discussion | PD |

Methods of Assessment Grid

| Ref | Knowledge to be assessed | Method of assessment | | | |
|-----|---|----------------------|----|-----|----|
| K1 | The fundamentals of marketing theory that support the marketing process e.g. the extended marketing mix (7P'S: Product, Price, Place, Promotion, Physical environment, Process, People), product development, and segmentation. | MCT | PR | PQA | |
| K2 | The concepts of brand positioning and management and implementing process to support corporate reputation | MCT | | | PD |
| K3 | The principles of stakeholder management and customer relationship management (CRM), both internal and external, to facilitate effective cross functional relationships | MCT | PR | PQA | |

| | | | | | |
|-----|---|-----|----|-----|----|
| K4 | The characteristics and plans of the business and sector they work within, including their vision and values | | PR | PQA | |
| K5 | How marketing contributes to achieving wider business objectives | MCT | PR | PQA | |
| K6 | The target audience's decision making process and how that can influence marketing activities | MCT | PR | PQA | |
| K7 | The sector specific legal, regulatory and compliance frameworks within which they must work, including current Data Protection regulations. | MCT | | | PD |
| K8 | The principles of effective market research and how this can influence marketing activity e.g. valid data collection sources and methodologies and usage, including digital sources and when to use quantitative and qualitative methods. | MCT | PR | PQA | |
| K9 | Basic principles of product development and product/service portfolios | MCT | | | PD |
| K10 | The marketing landscape and how routes to market interplay most efficiently, e.g. franchise model, distribution | MCT | | | PD |
| K11 | The features and benefits of different marketing communications channels and media (both digital and off line) and when and how to apply these | MCT | PR | PQA | |

| REF | Skills to be assessed | Method of assessment | | | |
|-----|---|----------------------|----|-----|--|
| S1 | Coordinate and maintain key marketing channels (both digital and offline) | | PR | PQA | |
| S2 | Plan and deliver tactical campaigns against SMART objectives | | PR | PQA | |
| S3 | Manage the production and distribution of marketing materials, e.g. digital, print and video content as appropriate. Including the ability to divide time effectively between reporting, planning and delivery. | | PR | PQA | |
| S4 | Produce a wide range of creative and effective communications, including ability to write and proofread clear and innovative copy, project briefs, and give confident presentations | | PR | PQA | |

| | | | | | |
|-----|---|--|----|-----|----|
| S5 | Able to engage and collaborate with a wide range of clients/stakeholders, across departments internally and with clients/suppliers externally to support marketing outcomes as required | | PR | PQA | |
| S6 | Use good project and time management to deliver projects/tasks/events effectively, as appropriate | | PR | PQA | |
| S7 | Coordinate several marketing campaigns/projects/events to agreed deadlines. | | | | PD |
| S8 | Effectively liaise with, and manage, internal and external stakeholders including suppliers to deliver required outcomes | | PR | PQA | |
| S9 | Monitor project budgets within their scope of work using appropriate systems and controls | | PR | PQA | |
| S10 | Assimilate and analyse data and information from a range of sources to support marketing activities | | PR | PQA | |
| S11 | Evaluate the effectiveness of marketing campaigns by choosing the appropriate digital and offline data sources | | PR | PQA | |
| S12 | Evaluate data and research to derive insights to support improvements to future campaigns. | | PR | PQA | |
| S13 | Effectively use appropriate business systems and software to deliver marketing outcomes efficiently, for example to analyse data, produce reports and deliver copy | | PR | PQA | |
| S14 | Use appropriate technologies to deliver marketing outcomes e.g. digital/web analytics, social media, CRM. | | PR | PQA | |

| REF | Behaviours to be assessed | Method of assessment | | | |
|-----|---|----------------------|----|-----|----|
| B1 | A tenacious and driven approach to see projects through to completion | | | | PD |
| B2 | Being a proven 'self-starter' and have an adaptable approach to meet changing work priorities | | | | PD |
| B3 | A creative and analytical mind, with a willingness to think of new ways of doing things | | PR | PQA | |
| B4 | They come up with ideas and solutions to support the delivery of their work | | PR | PQA | |
| B5 | A willingness to learn from mistakes, as not all activities go to plan, and | | | | PD |

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| | improve their own performance as a result | | | | |
| B6 | A high level of professionalism, reliability and dependability with a passion for the customer | | | | PD |
| B7 | A collaborative approach is central to how they work, showing empathy and being mindful to the needs/views of others | | PR | PQA | |
| B8 | Ethical behaviour in the way they approach marketing activities and their work, valuing equality & diversity. | | | | PD |

Annex B – Grading Criteria

As noted above although the overall apprenticeship grade is awarded fail, pass, merit or distinction, the 3 individual assessment methods will only be graded fail, pass or distinction. It is the combination of grades that determines the overall grade, rather than the requirement for separate 'merit' grading descriptor/criteria.

| Area of Standard | Grading Criteria for Multiple Choice Test | | |
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| | Fail (Score less than 24) | Pass grade (Scored 25-34) | Distinction grade (Scored 35-50) |
| Marketing Concepts and Theories | The apprentice has: Answered less than 24 questions correctly (K1, K2, K3, K5, K6, K7, K8, K9, K10, K11) | The apprentice has: Answered between 25 and 34 questions correctly (K1, K2, K3, K5, K6, K7, K8, K9, K10, K11) | The apprentice has: Answered more than 35 questions correctly (K1, K2, K3, K5, K6, K7, K8, K9, K10, K11) |
| Business Understanding & Commercial Awareness | | | |
| Market Research | | | |
| Products and Channels | | | |

| Grading Criteria for Project Showcase | | | |
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| Area of Standard | Fail | Pass grade | Distinction grade |
| | | The apprentice has demonstrated all the following criteria for the Project Report and Presentation and Q&A: | In addition to the pass criteria , the apprentice has also demonstrated at least 10 of the following criteria: |
| <p>Note – The Project Showcase is one assessment method, made up of the 2 individual components. One grade will be awarded for this assessment method. However the fundamental criteria for the Project Report component noted in the Section 1 below are essential for success overall, and apprentices will only be allowed to proceed to the Presentation with Question & Answer component once these criteria are confirmed as met.</p> | | | |
| Section 1 – Fundamental Criteria for Project Report Component | | | |
| | The apprentice has not met the pass criteria. | <p>They have prepared, submitted and presented a project that delivers marketing activity/event/campaign to agreed timescales using a recognised planning framework (S2, S6).</p> <p>The project report includes reference to at least 3 recognised marketing theories/frameworks and demonstrates consideration of these when</p> | <p>Demonstrates that they have undertaken some evaluation of the recognised theories/frameworks as part of their project, for example they have compared and contrasted theories, or provided an</p> |

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| | | <p>designing/delivering the marketing activity. (K1)</p> <p>Provides evidence that the delivery of the project demonstrates contact and collaboration with at least one internal and one external stakeholder (as appropriate for role/project). (K3, S5, B7)</p> <p>The marketing project's activity/event/campaign is at least 2 SMART objectives set for it, and is designed to achieve and measure these. (S2)</p> <p>Articulate an understanding of the business and its plans, and shows that the project's marketing activity, outcome and objectives have clear links to the employer's business requirements. (K4, S6)</p> | <p>evaluation of which are best suited to their project. (K1)</p> <p>Can articulate how they have engaged a range of stakeholders in delivery of the project both within and outside of the marketing function/organisation, and can provide an example of how stakeholder input helped shape their project (K3, S5, B7)</p> <p>Can show a more in-depth understanding of the business and /or the sector - for example they can show how they have considered sector issues or competitor activities in preparing their project. (K4, S6)</p> |
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| | | <p>The marketing project's activity/event demonstrates good co-ordination of digital and offline marketing channels. (S1)</p> <p>Demonstrates collection and analysis of data and information from at least two sources during their project. (S10)</p> <p>Demonstrates that appropriate systems were used to evaluate the success of the marketing activity/campaign/event. (S11, S14)</p> | <p>Can demonstrate that their data analysis went further – for example by utilising a range of more complex data sources, identified new sources, or that they looked outside of the organisation for that data (S10, B3)</p> |
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| Section 2 – Project Showcase - other criteria | | | |
| | The apprentice has not met the pass criteria. | The project evidences and provides examples of suitable content or collateral that has been produced for the marketing activity/event. (S3, S4, B3) | The examples of content/collateral show innovation and creativity, for example the content/collateral shows evidence of creative integration and of being informed by target audience insight and/or demonstrate an understanding of selecting the appropriate creative channel/messaging/design for the task, working within constraints applicable. (S3, S4, B3) |
| | | Have articulated an understanding of how the marketing activity/campaign/event contributes to marketing's overall goals and the organisation's goals. (K5, B8) | Evidence to show that the project's activities/outputs had demonstrable benefits to the apprentice's employer. (K5, B8) |

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| | | <p>The marketing activity/campaign/event is designed to meet customer needs and to take stakeholder requirements into account. (K3, K6, S8, B7)</p> <p>Can articulate how the marketing activity/campaign/event takes into account the stages of the customer decision-making process in its design and delivery. (K6)</p> | <p>They can demonstrate that the outcome of their project had a positive contribution towards the organisation's goals (may be of a particular department or part of the business) (K4, S6, S11)</p> <p>The report provides evidence of significant insight into the stakeholder groups impacted by the marketing activity/project demonstrated. (K3, K6, S8), for example the apprentice may have taken steps to gather new or additional stakeholder or customer feedback/insights as part of the project and used these to better shape the project. (B7)</p> <p>Demonstrates that Information has been shared, with evidence that supportive working relationships were established with colleagues inside and outside the marketing function, to achieve the goals of the project and meet customer needs</p> |
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| | | | as relevant to the project. (K4, S8, B7) |
| | | <p>Demonstrates that the marketing project is built on reliable market research including the use of both quantitative and qualitative data (K8, S13).</p> <p>Demonstrates the use of at least two separate suitable sources of data in planning the marketing activity. (K8, S10)</p> | <p>Demonstrated a clear understanding of data collection /market research methods and gives reasoned analysis of their suitability for the project (K8, S10, S13).</p> <p>Can demonstrate the use of a range of data sources and/or research methods, including digital, in the development of the project, and/or the use of their own market research to support the project (K8, B4)</p> |
| | | <p>Demonstrates that the marketing channels selected for the activity/campaign/event show a good understanding of the features and benefits of the tools and media used. (K11)</p> <p>Provides evidence that products and channels were selected after</p> | <p>Provides clear rationale as to the choice of channels, and the way they are coordinated to meet the marketing - defined activity's objectives. (K11, S1, S3)</p> <p>Provides evidence that they have fed in creative and imaginative ideas during the development and implementation of the marketing</p> |

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| | | consideration of new ideas and ways of doing things. (B3, B4) | campaign/event. (K11, B3, B4). For example by consideration of new or emerging trends or technology in marketing and/or their sector. |
| | | <p>Provides evidence that appropriate business systems, software and processes were used to deliver the objectives of the project in an efficient and effective manner. (S13, S14)</p> <p>Can articulate that they considered which technologies (if any) were suited to the delivery of their project (S13, S14)</p> <p>Demonstrates that the project was monitored on an ongoing basis to ensure it was within budget – this will include use of appropriate systems of processes to do this. (S9, S13)</p> <p>Demonstrates that software or systems used by the business were used to</p> | <p>Significant understanding of using systems and processes to evaluate progress and recommend improvements is evident throughout the project, and not just at the end. (S11, S12, S14)</p> <p>Can articulate that they created their own system or process to deliver project or to collect or analyse the data/information in support of their project (S10, B3)</p> <p>Provides evidence that strong analytical skills are used to measure their project's success, for example they have analysed project outcomes against the objectives that they set. (S10, S11)</p> |

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| | | analyse and identify areas for improvement for the future (S12, S13) | |
| | | <p>A presentation is prepared using suitable creative methods to demonstrate the development of both marketing skills and personal performance in the future. (K1, K2, B2)</p> <p>The presentation is delivered to a 10-minute timeframe. (S6)</p> <p>Professional communication skills are demonstrated during the presentation and Q & A session. (S4). For example the presentation is clearly structured and uses appropriate presentation aides to support, when questioned they can clearly articulate the detail of their project and provide the reasons for the decisions/actions they took in relation to the marketing activity delivered</p> | <p>Presentation is made with confidence and reasoned answers to questions are given to justify elements of the presentation, as well as elements of marketing used. (K1, K2)</p> <p>Presentation and answers to questions demonstrate insight into customer needs, stakeholder requirements, and the way in which they have considered these when planning and delivering their marketing activity. (S5, S8, S11, S12, B7)</p> |

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| | | <p>Can describe how they used project and time management to deliver the project for example they can articulate any systems of processes used to plan delivery, monitor progress or manage their time (S2, S6)</p> <p>The presentation provided clear competency-based examples that demonstrate:</p> <p>At least one example of how they have developed their Marketing skills as a result of the project</p> <p>At least one example of improvements planned for their performance and/or future delivery as a result of the project (B3, B4).</p> <p>Can articulate an example of their creativity used during the project – for example where they have brainstormed new ideas, considered new ways of working, or come up with alternative solutions when they haven't worked (B3, B4)</p> | <p>Can demonstrate that they undertook risk analysis as part of their project planning – showing consideration of potential risks for the project or the business' reputation (S2, S6, B4)</p> <p>Can demonstrate that improvements made as a result of the project have wider impact, for example have potential impact for the wider marketing department or business. (S12, B3, B5)</p> |
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| Grading Criteria for Professional Discussion | | | |
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| Area of Standard | Fail | Pass grade | Distinction grade |
| | The apprentice has demonstrated any of the following criteria: | The apprentice has demonstrated all the following criteria: | In addition to the pass criteria , the apprentice has also demonstrated at least 3 of the following criteria: |
| Explains the relevance of brand positioning and management and how this might impact marketing plans (K2) Demonstrate an understanding of the need to comply with relevant legislation and regulation. (K7) | The apprentice has not met the pass criteria. | Provided evidence during questioning that they understand and consistently use the knowledge, skills and behaviours mapped to this assessment method. | Provided reasoned / justified answers to questions, and evidence that they can apply their knowledge effectively in the workplace. For example, proactively illustrating their reasons or referring to the wider marketing context or theories. |

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| <p>Explain how they would develop new products and routes to market (K9, K10)</p> <p>Explain the actions they would take to co-ordinate several campaigns to meet deadlines (S7)</p> <p>Use examples to explain how they will:</p> <ul style="list-style-type: none"> • Drive projects to completion (B1) • Adapt and be flexible in changing situations (B2) • Act professionally and show emotional intelligence (B6, B7, B8) • Show resilience and continuous improvement (B5) | | <p><i>Answered questions on the following areas using either relevant examples to demonstrate their marketing knowledge and skills at the appropriate level,</i></p> <p><i>Or</i></p> <p><i>How they would apply this in the given scenarios:</i></p> <p>Can articulate the concepts of brand positioning and management, and can illustrate why this is important for their organisation's corporate reputation (K2)</p> <p>Can describe the legal, regulatory and compliance frameworks that are relevant to their organisation/sector and the need to comply with those (K7)</p> <p>Can describe why data protection regulations are relevant for marketing (K7)</p> | <p>Used examples that demonstrate an understanding during the discussion that goes beyond their role, and their requirements of the standard, proactively discusses and demonstrates a wider understanding of the challenges and issues facing organisations in the sector and how those impact on their work.</p> |
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| | | <p>They can give an overview of the principles of new product development and describe what that product's different routes to market might be (K9, K10)</p> <p>Can explain the actions they would take to co-ordinate several campaigns/activities/events to meet deadlines (S7)</p> <p><i>Provide evidence that they meet the criteria for the following behaviours in the Standard by giving examples of how they demonstrate these behaviours in the workplace, or how they would apply these in the given scenarios:</i></p> <p>Provide evidence that a driven approach is evident in personally seeing projects or task to completion – which can be illustrated through the use of examples where actions were required to ensure the project, did not stall. (B1)</p> <p>Adapt and be flexible in changing situations (B2) – can illustrate through the use of examples how they have adapted an approach or activity to a</p> | <p>Can provide an example of where they have exceeded KPIs, timings or objectives for a given task – for example illustrating through performance management feedback, customer feedback, awards achieved (B1/B2).</p> <p>Can articulate through an example of where they have proactively</p> |
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| | | <p>new situation such as a competitor activity, sector news story, political event etc</p> <p>Show resilience and continuous improvement (B5) – can illustrate how they have demonstrated tenacity in the face of challenging circumstances, and articulate how they have improved their own performance as a result of past experience.</p> <p>They can articulate examples of where they have delivered consistent customer service, or put the customer first (B6).</p> <p>They can demonstrate emotional intelligence - in the way they deal with others, for example consideration of other’s views. (B6, B8)</p> <p>Can articulate why ethical behaviour in marketing are important – and describe how they have considered equality and diversity in the work they have delivered (B8)</p> | <p>identified barriers to completion and take the initiative to deal with these appropriately, for example taking actions to address, developing contingencies and/or escalating (B1)</p> <p>Demonstrated through examples that they regularly go beyond expectations for their level/role – and deliver more than expected, for example they can show how they have acted as a role-model for marketing within the department/business, can show that they have acted in a consultative fashion – to give marketing advice or supported others in the development of their performance or skills (B5, B6)</p> <p>Can provide evidence of where Customer/stakeholder expectations are consistently exceeded, for example through customer feedback received (K6)</p> |
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End