

Marketing Manager L6 Apprenticeship Standard

End-Point Assessment Plan (ST0612)

May 2018

1. Introduction and Overview

The Marketing Manager apprenticeship is designed to develop the professional standard required of people working in Marketing Manager roles in organisations across the private, public and third sectors. The standard and this end-point assessment plan have been developed by the Marketing Trailblazer Group made up of small, medium and large employers. 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.

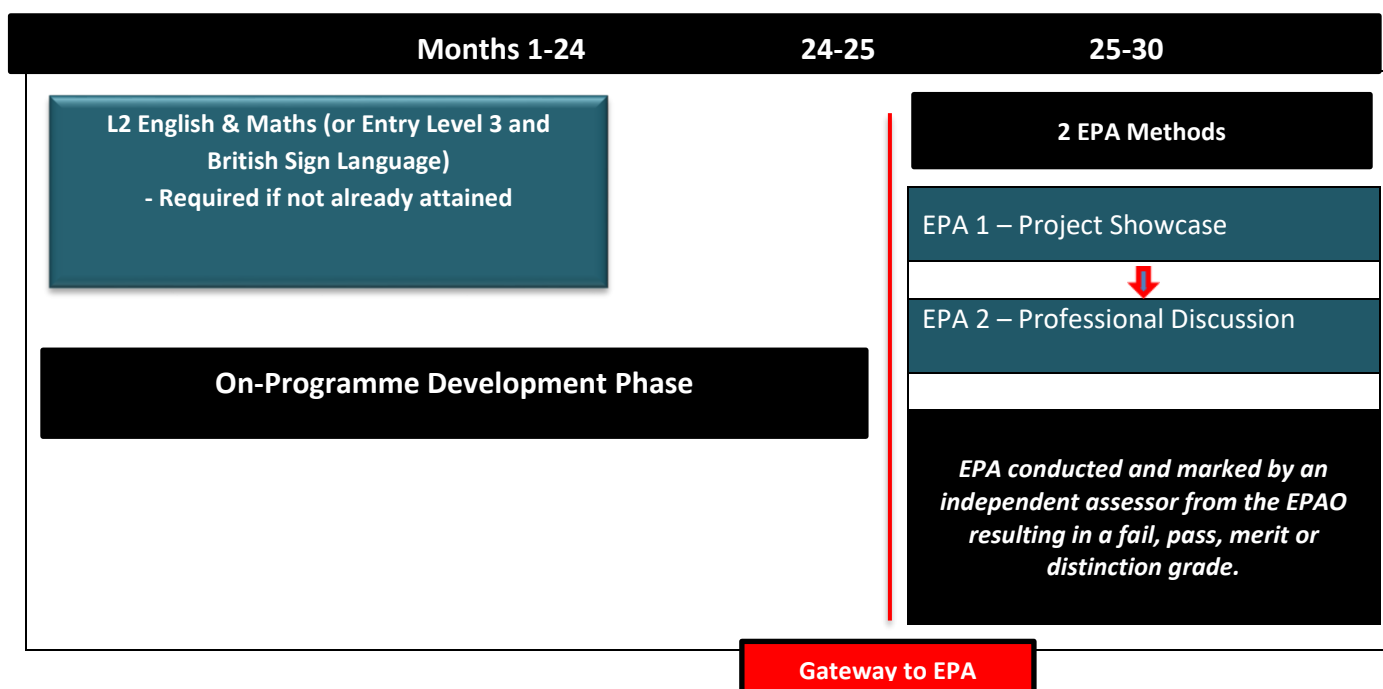
Full time apprentices will typically spend around 25 months on-programme working towards the apprenticeship standard, with a minimum of 20% off-the-job training. Performance in the EPA will determine the apprenticeship grade of fail, pass, merit or distinction.

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 2 distinct assessment methods:

- Project Showcase
- Professional Discussion

Diagram 1 – Example of On-Programme and EPA Timescales

2. End-Point Assessment Gateway

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 apprenticeship's 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 initial 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.

3. End-Point Assessment – Methods, Timescales and Location

3.1 End-point Assessment Methods

The apprentice will be assessed against the apprenticeship standard using **two** 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 is made up of 2 distinct assessment methods:

1. EPA 1: **Project Showcase** – This method combines 3 components – a Project Report, a Presentation and a Q&A which are marked and awarded a grade, the purpose of which are to showcase the apprentice’s Marketing Plan Project. The project report will be submitted to the EPAO for remote assessment prior to the 20 minute Presentation and 30 minute Question and Answer (see S3.2)
2. EPA 2: **Professional discussion** - 70 minute discussion between the apprentice and Independent Assessor (see S3.3)

The apprentice will not pass through to the Project Showcase’s Presentation with Q&A or the Professional Discussion if they have not met the fundamental pass criteria specified in Annex B (S1) for the Project Showcase’s Project Report component. The End-Point Assessment Organisation (EPAO) will inform the employer, apprentice and training provider if this is the case. The Presentation and Q&A components of EPA 1 and EPA 2 (the Professional Discussion), will be taken 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 2 should take place last. They will be notified of their grades for each method, and overall on completion of their EPA. See section 4.3 for criteria for re-sits/re-takes.

3.2 EPA 1: 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 an end-to-end Marketing Plan that the apprentice has designed and developed during the EPA period. To be clear, the Work-based project requires the apprentices to prepare the Marketing Plan (a key skill for a Marketing Manager), it does not require them to implement the activities defined in the plan.

The Work Based project should:

- Be the development of a Marketing Plan, which covers the planning, research and consultation required for that plan
- Be based upon a recognised planning framework, and should demonstrate the aspects of the standard mapped to this method in Annex A.
- Be a substantive piece of work, and linked to a real business-related project or objective.
- Have strategic focus e.g. it shows how what they are proposing and planning will meet a business objective or challenge
- Focus on a challenge that is sizeable, such as the launch or repositioning of the organisation's products or services, a significant change in the way the organisation interacts with customers/other groups of extended stakeholders or an integrated marketing communications plan
- Start with a full audit of the factors influencing the chosen area before developing strategy, objectives and tactics for a full implementation plan.

As the Marketing Plan should be based on something with significant scale and scope, the apprentice is not required to implement the project plan or resulting marketing activity as part of their EPA (as this is likely to require timescales outside that of the EPA). Instead the project's focus is on the development stages of that marketing plan, providing details in the submitted Project Report of how they propose to manage the onward delivery.

Project Showcase - Project Report Component (based on Marketing Plan)

The Apprentice will be given 4 months after the gateway to develop the Marketing Plan and complete the Project Report. The Project Report should take the form of a formal business report of 4000 words (+/- 10%), not including annexes, tables, and charts.

The EPAO will provide appropriate guidance/criteria and templates to support production of projects. Employers, with the support of their training provider if requested, will use this project guidance/criteria to support the apprentice to develop a project plan, the project should be based on a real business requirement (i.e. not simulated) to best test competence. The project plan should be discussed and agreed at EPA gateway by the apprentice and their line manager.

The Project Report should describe how the apprentice has developed the marketing plan, focussing on the actions and decisions taken, critically analysing the reasons for those.

The Project Report should describe how the apprentice:

- Analysed the problem, including demonstrating significant consultation with relevant business stakeholders internally and externally when developing the plan
- Reviewed the challenges presented by the internal and external environment.
- Conducted relevant background research e.g. business requirements/implications, Marketing/industry developments, and any regulatory requirements.

- Researched and developed options for potential solutions, giving reasoned explanations as to their inclusion or rejection. E.g. assess the pros and cons of using a particular type of campaign or marketing channel
- Considered the underpinning theories and evidence when making decisions
- Considered resources that would be needed if the plan were to be implemented, including system needs, people skills, time, and money
- Collaborated and consulted with colleagues and the business in the development of the agreed solution and business case, also indicating how they would deliver onward collaboration and 'buy-in' if the plan were to be implemented
- Would implement the plan if taken forward e.g. explain how the Marketing activities defined in the plan would be delivered, describing how they would account for any changes in time, resource, processes and budgetary requirements that maybe required
- Would manage and lead the project if the plan were to be implemented.
- Would evaluate the delivery of the marketing plan/activities if implemented – may include planned methods for measuring Return on Investment (ROI), added value to customers or business improvements as a result of the marketing strategy.
- Evaluated the development of their marketing plan for lessons learnt and things to improve upon for next time.

The Project Report should include annexes which provide evidence of how the plan would be delivered/achieved e.g. marketing planning documents, relevant emails or client/stakeholder/manager feedback, marketing tools used, research/data analysed. 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. A statement outlining the apprentice's contribution signed by the apprentice and their employer must accompany the evidence. 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 assessed 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 Report components of this method they will not progress onto the Presentation with Q&A, nor EPA2, 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 Work based 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 component 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 with 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 also based on the requirements for this method in Annex A and B. 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 20-minute (+/-10%) presentation is for the apprentice to effectively 'pitch' their business case for their Marketing Plan (as if presenting to the 'board' to gain backing for the plan).

The presentation should focus on demonstrating:

- The key business benefits to be gained if their marketing plan were to be implemented
- How they would be applying the marketing activities defined in their plan to support business strategy/objectives.

The presentation should also:

- Highlight any resource issues that they would need support for
- Highlight any potential areas of risk, and how these would be handled/contingency plans
- How they would engage key stakeholders in the delivery, how they would use advanced stakeholder management to facilitate the delivery of the marketing 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 aids 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 of this – looking at their delivery style, clarity and communication skills (as required in the standard).

The presentation will be followed by a 30 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 10-12 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 Work based project with presentation and Q&A 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 EPA 2, the Professional Discussion, on that day.

3.3 EPA 2: Professional Discussion

The Professional Discussion will conclude the end-point assessment process. Over the course of 70 minutes (+/-10%) the IA will holistically assess the candidate's knowledge, skills and behaviours (KSBs) that are mapped to this method in Annex A. The IA will typically ask 5 competency-based questions (e.g. asking for examples of...) enabling the apprentice to explain how KSBs were personally achieved in role, and 5 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 have a focus on testing the behaviours in the standard, as mapped to this assessment method in Annex A, providing the apprentice with an opportunity to evidence these.

A structured brief and question bank will be developed by the EPAOs, 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 (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 maintain a question bank of sufficient size to prevent predictability.

4. Grading the End-point Assessment

4.1 Final Grading

The apprenticeship for Marketing Manager 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 Managers 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 both 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 a pass in their Professional Discussion.

The final apprenticeship grade is based on performance across both the assessment methods. An independent assessor must combine the grades of the two 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 **both of the** end-point assessment methods.
- **To achieve merit grade overall** the apprentice must achieve a **distinction** in the Project Showcase and **pass** in the **professional discussion**.
- **To achieve distinction grade overall** the apprentice must achieve a **Distinction** in **both of the** 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.

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

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

4.2 Grading Criteria

The detailed tables in **Annex B** show the assessment 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 of EPA

Apprentices that fail one or more EPA method will have the opportunity to re-sit/re-take. Re-sits/re-takes are not to be offered to apprentices wishing to move up to a higher apprenticeship grade. A re-sit does not require further learning, whereas a re-take does. Re-sits/re-takes are permitted to 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-take.
- **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 receive different questions in the Project Showcase's Q&A and for the Professional Discussion when taking a re-sit/re-take.
- 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 Manager standard.

The Marketing Trailblazer expects apprentices to be assessed in a fair and consistent way without any doubt as to credibility of achievement that must be recognisable across the UK.

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

- Develop and provide all required material and resources required for the EPA (i.e. Project criteria and guidance, presentation & questioning guide, Q&A Sample questions, 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, 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.
- 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 least at the same level as 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 meet the requirements for registration as an Associate Member (ACIM) of the Chartered Institute of Marketing (CIM), dependent on them meeting the required criteria.

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, with 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 method, 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, and 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; including a bank of competency based questions to cover the skills, knowledge and behaviours of the standard;
- 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
- 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.

The EPAOs will also offer a range of support materials to apprentices and their employers to help with testing preparations and specifications. These will be developed as part of the Assessment Tools to ensure that they are consistent across all apprentices. 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
- Remote assessment is permissible, reducing travel costs
- The work based project is based on real work completed for the apprentices employer, adding value to the employer

8.2 Volumes

The Marketing Manager apprenticeship is expected to attract 50 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.

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

A Marketing Manager 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 2 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.

Title	Method	Key
Project Showcase	- Project report which presents a business case for an end-to-end marketing plan. - 20 Minute Presentation - 30 Minute Q&A	PR PQA
Professional Discussion	70 Minute competency based discussion	PD

Methods of Assessment Grid

Ref	Knowledge to be assessed	Method of assessment		
K1	The principles and theories of marketing that support the strategic marketing process, e.g. the extended marketing mix (7P'S: Product, Price, Place, Promotion, Physical environment, Process, People), marketing management processes, product development and how to apply and align these to the business plan and strategic objectives	PR	PQA	
K2	Brand development and safeguarding, including the analysis and planning of how a brand is perceived in the market, value propositions and delivery of tangible elements such as product pricing, packaging etc.	PR	PQA	
K3	Consumer and organisational behaviour theories and concepts, including the customer (business 2 business/consumer) decision making process and how that influences marketing strategy	PR	PQA	
K4	Advanced stakeholder management and the application of customer relationship management (CRM), both internal and external, to facilitate the delivery of marketing plans	PR	PQA	
K5	Marketing Communication planning models and budgetary methodologies.	PR	PQA	

K6	Their organisation's vision, mission, values, strategy, plans, stakeholders, customers and competitors to support the decision and planning process.	PR	PQA	
K7	The wider business perspective in which marketing operates nationally and internationally, including the influences of the internal and external market/sector, the opportunities, challenges and issues it faces, and how marketing can address these.	PR	PQA	
K8	How to measure and deliver Return on Investment in relation to marketing activities and plans	PR	PQA	
K9	The relevant industry/sector specific legal, regulatory and compliance frameworks within which they must work, including current Data Protection regulations	PR	PQA	
K10	Effective Market research and evaluation techniques and methods and how to use the results to inform marketing planning and activities	PR	PQA	
K11	Reliable information sources and how to use these to deliver measurable improvements to marketing activities, including how metrics are used to measure these.	PR	PQA	
K12	New and emerging trends and themes in marketing	PR	PQA	
K13	The principles of product and service design and implementation and portfolio management			PD
K14	The features and benefits of different marketing communications, and routes to market, and how to leverage these to maximum effect, including the use of appropriate digital channel and systems.	PR	PQA	

REF	Skills to be assessed	Method of assessment		
S1	Lead and Implement a clear marketing plan and strategy, linked to business requirements to sustain a marketing advantage	PR	PQA	
S2	Develop effective marketing campaigns and channels, assessing their features and benefits to best meet business requirements and customer needs	PR	PQA	
S3	Develop detailed integrated marketing plans for all products/ services using offline and digital media tools - works with marketing team/ specialist agencies to do this.	PR	PQA	
S4	Influence negotiate and persuade at senior level collaborating with a wide range of stakeholders internally and externally to gain support/backing for marketing delivery	PR	PQA	
S5	Act as a consultant, providing professional marketing advice to stakeholders around the business or to external clients as relevant			PD

S6	Present complex information in an understandable and stimulating way whether through effective verbal presentation or creative written copy.	PR	PQA	
S7	Oversee, manage and approve key marketing activities/projects			PD
S8	Deliver measurable marketing outcomes against key performance indicators and identify and drive continuous improvement, challenging existing processes and procedures where needed	PR	PQA	
S9	Effectively plan and manage the marketing budget, to deliver on strategic objectives, and evaluate and justify return on marketing investment	WPB	PQA	
S10	Effectively engage, negotiate and manage third party suppliers and internal stakeholders.	PR	PQA	
S11	Effectively evaluate marketing activities using measurement data and analytics to identify relevant key performance indicators (KPI) and return on marketing investment in order to meet business objectives.	PR	PQA	
S12	Assimilate and analyse complex data and information from a range of sources to evolve, lead and plan marketing activities	PR	PQA	
S13	Seek out opportunities to increase income generation and gain new business e.g. new products, markets and services as relevant	PR	PQA	
S14	Construct a robust business case in support of marketing activities/plans	PR	PQA	
S15	Effectively manage and develop stakeholder relationships at senior level.			PD
S16	Assess business risks and reputational impacts of marketing activities	PR	PQA	
S17	Inspire and motivate internally and externally to deliver marketing plans effectively, acting as a role-model for marketing best practice and taking responsibility for improving their own and the team's and/or stakeholder performance, as relevant			PD
S18	Effectively use appropriate business systems and software to deliver marketing outcomes efficiently, for example to analyse data, inform search engine marketing, produce reports and deliver copy	PR	PQA	
S19	Actively interrogate systems and information sources to make judgments on when to introduce new ways of working/identify new systems/processes to improve marketing activities or address those new requirements and /or marketing trends	PR	PQA	

REF	Behaviours to be assessed	Method of assessment
-----	---------------------------	----------------------

B1	An ability to anticipate and adapt to change	PR	PQA	
B2	A highly motivated and driven approach acting with courage to drive through necessary changes and deliver difficult or long-term projects			PD
B3	A creative and innovative approach	PR	PQA	
B4	An analytical mind, with an insight and ideas driven approach to meet business benefits and inspire action in others	PR	PQA	
B5	A willingness to learn from mistakes, as not all activities go to plan, and improve future delivery/campaigns as a result			PD
B6	They act as a role model for marketing activities and business changes within the team and organisation, taking others with them.			PD
B7	A high level of professionalism, reliability and dependability with a passion for the customer, also encouraging those behaviours in others			PD
B8	A collaborative approach is central to how they work, showing empathy and being mindful to the needs/views of others	PR	PQA	
B9	Ethical behaviour in the way they approach marketing activities and their work, valuing equality & diversity, they act as a role model for that behaviour	PR	PQA	

Annex B – Grading Criteria

As noted above although the overall apprenticeship grade is awarded fail, pass, merit or distinction, the 2 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 a separate ‘merit’ grading descriptor/criteria.

Grading Criteria for Project Showcase

Area of Standard	Fail	Pass grade The apprentice has demonstrated all the following criteria for the Project Showcase:	Distinction grade In addition to the pass criteria, the apprentice has also demonstrated at least 8 of the following criteria:
------------------	------	--	---

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 S.1 below are essential for success overall and apprentices will only be allowed to proceed to the Presentation and Question & Answer section once these criteria are confirmed as met.

Section 1 – Fundamental Criteria for Project Report Component

	The apprentice has not reached the pass criteria.	<p>Produce a project report that covers the analysis, strategy, tactics and planned implementation and evaluation of an end-to-end marketing plan, which is linked to a business requirement. (K5, S1, S11, S12)</p> <p>Project report follows an appropriate format for a business case and explains the business case clearly with some supporting evidence (K5, S14)</p>	Business case is reasoned, with clear and a range of impactful evidence provided in support of the plan (S14)
--	---	---	---

		<p>Provides evidence that they have based the preparation of the plan on recognised strategic marketing theories, models and frameworks – with at least 3 recognised theories/models referenced. (K1, K5)</p> <p>Articulates an understanding of consumer and organisational behaviour theories in the preparation of the marketing plan, can articulate how these can influence marketing strategy. (K3)</p> <p>Articulates how the marketing campaign/channels/activities selected as part of their marketing plan were chosen to meet business requirements and /or customer needs (K3, S2, B4)</p> <p>Provides evidence that they have analysed the market environment and articulates an understanding of at least one key business/sector issue impacting the marketing plan (K7, S12).</p>	<p>Demonstrates how they have adapted existing models or frameworks to better support their specific strategy or plan. (K1, K5, B3)</p> <p>Shows significant insight into the stakeholder groups impacted by the marketing activity/project delivered. (K3, CS2)</p> <p>Articulates how they have taken research and analysis further, for example by looking outside of their industry for ideas/innovations that they could apply to their plan, analysis of competitor activity, undertaken additional customer research or research into customer or organisational behaviour to support their business case (K7, S12)</p> <p>Shows understanding of different financial metrics that can be used to make a business case and evaluate marketing activity e.g. cashflow; break-even point; payback period (K5, S9, S11, S14).</p>
--	--	---	---

		<p>Articulates that they have considered how their plan will achieve a return on marketing investment, including reference to a suitable method of how they would measure this ROI. This should include a description of how they would plan and manage the budget for the marketing plan, referencing at least one appropriate budgetary methodology, and reference to the existing KPIs they aim to be improve (K5, K8, S9, S11)</p> <p>Can articulate when questioned how their marketing plan would provide/add value for customers and/or the business (K8, S11)</p> <p>Articulates how they have used and interrogated data/information and appropriate systems and processes to enable effective delivery of the project plan to its objectives. (S18, S19)</p> <p>Articulates how they have considered any relevant industry/sector legal/regulatory/compliance frameworks when developing their plan (K9)</p>	<p>Provides additional detail in their business case on how they expect return of investment (ROI) to be achieved through the plan, for example showing analysis of relevant KPIs and measurement data e.g. sales/service levels/customer recognition/customer satisfaction and articulates how they would evaluate these following implementation of the plan to measure ROI (K5, K8, S9, S11, S12)</p> <p>Can articulate how they used new or innovative ways of working and/or innovative processes when looking to achieve return on marketing investment. (K12, B3)</p> <p>Has implemented or identified new or creative systems/ methods/ processes/service improvements as part of their plan (S8, S19, B3)</p>
Section 2 – Project Showcase - other criteria			
		Articulates how their marketing plan is linked to business	

		<p>requirements/objectives and articulates an understanding of the organisation's vision, mission, values, strategy, plans, stakeholders, customers and competitors (K6, S1, B4)</p> <p>Articulates an understanding of the features and benefits of marketing communication tools and routes to market when selecting marketing activities/channels/campaigns for their plan (S2, S3) providing at least one example of how they have considered features and benefits of the campaign/channels selected</p> <p>Identifies at least one opportunity to grow business as part of their business case (S13, B4)</p> <p>Demonstrates that they can present complex information in an understandable way whether written or verbal – for example the business case report follows a logical and clear structure, using appropriate language, uses suitable methods to display and communicate – for example suitable use of tables, charts, diagrams as appropriate (S6)</p>	<p>Demonstrates that they have critically analysed the features and benefits of a range of campaigns /channels/activities and provided reasoned rationale as to their choices linked to plan objectives (S2, S3)</p> <p>Demonstrated the use of a wide range of marketing research methods and data sources.</p>
--	--	---	--

		<p>Has provided evidence to show they have defined the marketing research needs to support the project plan. They have ensured that data is analysed and transformed effectively into information, avoiding bias and data overload. Evidenced that they have created a system for analysis of information and have generated insights from this (K10, K11, S12, B4)</p>	<p>Evidence that research findings used not only to support the plan/project, but also to inform the need for improvements on an on-going basis. (K10, K11, B4)</p> <p>Articulates risks or challenges related to the data/information and /or market research – shows they have analysed those risks and accounted for them when using the information/source (K11, B4)</p>
		<p>A pitch presentation is prepared using suitable creative methods and communicates a clear business case for the Marketing Plan, the pitch should clearly identify the key business benefits to be achieved by implementing their plan (S1, S6, S14, B3).</p> <p>Clearly and concisely articulate how they would be applying the defined marketing activities in the plan to support business strategy/objectives. (S1, B4)</p> <p>The presentation is delivered to a 20-minute timeframe.</p> <p>Professional communication and influencing skills are demonstrated during</p>	

		<p>the presentation and Q & A session. (S4, S6). This should include that they can articulate the detail of their project and examples from it, and provide reasons for decisions/actions taken.</p> <p>Can articulate how brand strategy has been developed in their organisation and how their marketing plan supports that brand (K2)</p> <p>Can articulate the resources that they would need support for to deliver the plan, including ways in which marketing planning communication models and budgets should be used to best advantage. (S1, K5)</p> <p>Demonstrates that they have conducted a risk assessment as part of their business case, and shows consideration of any reputational risks linked to their marketing plan (S16)</p> <p>Demonstrates an ability to anticipate and adapt to change during the</p>	<p>Can describe how their marketing plan proactively safeguards their brand (K12)</p> <p>Demonstrates that they have undertaken a robust risk analysis – by not just recognizing or adapting to changes/new scenarios as they arise, but by actively planning for those and putting in place contingency plans – for example by identifying insights through horizon</p>
--	--	---	--

		<p>implementation of the marketing plan/project for example by adapting their plan to account for a new competitor activity, political situation, or news story. (B10)</p> <p>Can articulate how they engaged and collaborated with key stakeholders in development of their plan, including an example of how stakeholder/s input helped shape the plan (S4, S10, B8).</p> <p>Can describe how they would use stakeholder management to facilitate the onwards delivery of the marketing plan, including how they would manage and inspire others to support and deliver the plan (K4, S4, B4, B8)</p> <p>Can articulate an awareness of new and emerging developments/trends in</p>	<p>scanning/research (e.g. emerging risks/competitor activity, political impacts) and articulating how plans might need to be adapted to account for those (S16, B1, B4)</p> <p>Can articulate and in-depth insight into customer needs, stakeholder requirements, and the way in which their marketing plan is designed taking these elements into account. (K4, B8)</p> <p>Can demonstrate that their collaboration with stakeholders during the project planning has created mutually supportive working relationships and/or gone beyond what might be expected – this might include collaborating and seeking views from a wider set of stakeholders, perhaps those outside the marketing function or the organisation (as appropriate to the project) or shown collaboration and by-in for the plan at senior/strategic level (S4, S10, B8)</p> <p>Can demonstrate that they have used new marketing concepts/ideas/emerging trends to support their marketing plan and have taken a strategic view and critical analysis of those new ideas/trends – providing an idea of how the</p>
--	--	---	--

		<p>marketing that are relevant to their marketing plan. (K12)</p> <p>Can articulate use of a creative/innovative approach to the preparation of the plan or how they plan to deliver it –using at least one example from their project to demonstrate this (B3, B4)</p> <p>Can articulate the importance of why an ethical approach to marketing, including valuing equality and diversity is important, and can provide an example of how they considered this when developing their marketing plan (B9)</p>	<p>organisation’s marketing strategy /activities should change/develop based on these (K12, B3, B4)</p>
--	--	---	---

Grading Criteria for Professional Discussion			
Area of Standard on which discussion should be based	Fail	Pass grade The apprentice has demonstrated all the following criteria:	Distinction grade In addition to the pass criteria, the apprentice has also demonstrated a minimum of 4 of the following criteria:
Principles of product/service design/ implementation/ assess the demand for products/services. (K13)	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	Provide reasoned and justified answers to questions or scenarios, and consistently evidence that they can apply their knowledge effectively in the workplace. For example, proactively illustrate their

<p>Act as a consultant - explore ways to provide professional marketing advice to stakeholders (CS5)</p> <p>Demonstrates that they have overseen, managed and approved the key marketing activities of the project. (CS7)</p> <p>Lead the delivery of marketing plans, improving own and team's performance/stakeholders (CS17)</p> <p>Explain how strategic stakeholder relationships would be managed and developed. (CS15)</p> <p>Demonstrate motivated and driven approach, acting with courage to drive changes and</p>		<p><i>Answered questions using relevant examples to demonstrate their understanding of marketing strategy and its role in business 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 principles of product/service design and implementation and can describe how these can be used to assess the demand for a service/product. (K13)</p> <p>Can articulate ways in which professional marketing advice might be given for the benefit of the organisation – providing at least one example of how they have acted as a consultant to stakeholders internally or clients externally (as appropriate to role). Can articulate the importance of acting professionally in that situation (S5, B5)</p>	<p>reasons or referring to the wider marketing context or theories/models.</p> <p>Used examples that demonstrate a depth of understanding and insight during the discussion that goes beyond their role, for example they proactively discuss and demonstrate a wider understanding of the challenges and issues facing organisations in the sector and how those impact on their work.</p> <p>Demonstrates through examples that they regularly go beyond expectations – and deliver more than expected – for example where they have exceeded performance requirements, or KPIs, have undertaken additional projects to add value, had their excellent performance recognised by the business and /or customers.</p> <p>Can provide at least one example of where their marketing advice has had measurable benefits to the stakeholders/customers involved or for the business (S5)</p>
--	--	---	--

<p>deliver difficult long-term projects (CB2)</p> <p>Act as a role model for marketing, taking others with them (CB6)</p> <p>Act as a professional, reliable and dependable customer champion (CB7)</p> <p>Be willing to learn from mistakes and improve future performance (CB5)</p>		<p>Can demonstrate their ability to lead and drive a marketing activity/project – by providing an example of how they did this, or applying what they have learnt to a given scenario to demonstrate this (S7, S17), this should include illustrations of how they maintained their motivation throughout and supported others to do the same, and delivered the activity despite set backs or long timescales (B2)</p> <p>Can articulate how they have improved their own performance and that of their team/and or stakeholders – for example they may have set and monitored new KPIs/objectives to drive improved performance, implemented a new or more efficient process/way of working (S17, B6, B7)</p> <p><i>Provides evidence that they meet the criteria for behaviours in the Standard and provide examples of how they demonstrate these behaviours in the workplace, or how they would apply these in the given scenarios:</i></p> <p>Can articulate through an example how they have been inspirational and/or acted as a motivator within their team or more widely – for example by acting as a role-model when changes are needed or by sharing good</p>	<p>Can describe how changes they recommended/identified could drive improvements to the organisation, and or wider sector.</p>
---	--	--	--

		<p>news/best practice – internally/externally (S16, B2, B6)</p> <p>Can describe an example of where they have learnt from mistakes or challenging situations and illustrate how they have adapted/improved future ways of working/marketing activities as a result (B5)</p> <p>Can articulate through examples how they demonstrate their reliability and dependability in their work – for example (B7)</p> <p>Can describe how they have acted as a role-model for marketing or marketing activities for example (B6)</p>	<p>Can demonstrate how they have proactively sought opportunities to be a role-model for the sector/marketing/organisation as appropriate, for example by acting as ambassador outside of the organisation – such as external speaking events, arranging networking opportunities, best practice sharing, mentoring opportunities (S16, B2, B6)</p> <p>Can articulate an example of where improvements they have made based on past performance, have had significant impact, for example have resulted in cost savings, improved productivity or enhanced performance against KPIs (B5).</p>
--	--	---	---

End