

# End-point assessment plan for Marketing Assistant apprenticeship standard

| Apprenticeship standard reference number | Level of this end point assessment (EPA) | Integrated |
|--|--|------------|
| ST0807                                   | 3  | No         |

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## Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the Marketing Assistant apprenticeship standard. It is for end-point assessment organisations (EPAOs) that need to know how EPA for this apprenticeship must operate. It will also be of interest to Marketing Assistant apprentices, their employers and training providers.

Full time apprentices will typically spend 18 months on-programme (before the gateway) working towards the occupational standard, with a minimum of 20% off-the-job training. All apprentices will spend a minimum of 12 months on-programme.

The EPA period should only start, and the EPA be arranged, once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, all of the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPAO.

All pre-requisites for EPA assessment methods must also be complete and available for the assessor as necessary.

For level 3 apprenticeships and above apprentices without English and mathematics at level 2 must achieve level 2 prior to taking their EPA.

The EPA must be completed within an EPA period lasting a maximum of 6 months, beginning when the apprentice has passed the EPA gateway.

The EPA consists of 2 discrete assessment methods.

The individual assessment methods will have the following grades:

### Assessment method 1: **Knowledge test**

- Fail
- Pass
- Distinction

### Assessment method 2: **Work Based Project Showcase**

- Fail
- Pass
- Distinction

Performance in the EPA will determine the overall apprenticeship standard and grade of:

- Fail
- Pass
- Merit
- Distinction

## EPA summary table

|  |   |
|--|---|
| <b>On-programme</b><br>(typically 18 months)                         | Training to develop the occupation standard's knowledge, skills and behaviours.   |
| <b>End-point Assessment Gateway</b>                                  | <ul style="list-style-type: none"> <li>• Employer is satisfied the apprentice is consistently working at, or above, the level of the occupational standard.</li> <li>• English/mathematics Level 2</li> </ul> <p>Apprentices must complete:</p> <ul style="list-style-type: none"> <li>• The employer should agree with the apprentice the subject/outline of the Work Based Project at gateway - this should be supported with reference to the EPAO's project guidance and examples.</li> </ul> |
| <b>End Point Assessment</b><br>(which would typically take 6 months) | <p>Assessment Method 1: <b>Knowledge test</b></p> <p>With the following grades:</p> <ul style="list-style-type: none"> <li>· Fail</li> <li>· Pass</li> <li>· Distinction</li> </ul> <p>Assessment Method 2: <b>Work Based Project Showcase</b></p> <p>With the following grades:</p> <ul style="list-style-type: none"> <li>· Fail</li> <li>· Pass</li> <li>· Distinction</li> </ul>  |
| <b>Professional recognition</b>                                      | Aligns with recognition by: <ul style="list-style-type: none"> <li>• Chartered Institute of Marketing (CIM)</li> </ul>  |

## Length of end-point assessment period:

The EPA must be completed within an EPA period lasting a maximum of 6 month(s), beginning when the apprentice has passed the EPA gateway.

## Order of assessment methods

The assessment methods can be delivered in any order, however it is suggested that the Knowledge Test is taken early in the EPA period. The Knowledge test does not need to be completed before the Work Based Project is started – it is suggested that this is commenced as soon as possible after gateway to avoid any delays in project completion.

## Gateway

The EPA period should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, that is to say they have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's training provider(s), but the decision must ultimately be made solely by the employer.

In addition to the employer's confirmation that the apprentice is working at or above the level in the occupational standard, the apprentice must have completed the following gateway requirements prior to beginning EPA:

- English and mathematics at level 2.

For those with an education, health and care plan or a legacy statement the apprenticeships English and mathematics minimum requirement is Entry Level 3 and British Sign Language qualification are an alternative to English qualifications for whom this is their primary language.

For the Knowledge test:

- No specific requirements prior to gateway

For the Work Based Project Showcase:

- The employer should agree with the apprentice the subject/outline of the Work Based Project at gateway - this should be supported with reference to the EPAO's project guidance and examples.

# Assessment methods

## Assessment Method 1: Knowledge Test (This Method has 1 component.)

### Method 1 - Component 1: Knowledge Test

#### Overview

The rationale for this assessment method is:

This is a robust but also cost effective and efficient way to test some of the knowledge and skills in the apprenticeship standard. It also complements the other method as it tests aspects that can't be tested elsewhere.

#### Test Format

The test can be:

- Computer based
- Paper based

It will consist of 40 questions closed response questions (multiple-choice questions) - 10 of which will be based on 2 given scenarios.

#### Test administration

Apprentices must have 90 minutes to complete the test.

The test is closed book, which means that the apprentice cannot refer to reference books or materials.

Apprentices must take the test in a suitably controlled environment that is a quiet space, free of distractions and influence, in the presence of an invigilator arranged by the EPAO. The invigilation may be through the use of specialised (proctor) software, if the test is taken on-line. The EPAO is required to have an invigilation policy that will set out how the test/examination is to be carried out. This will include specifying the most appropriate ratio of apprentices to invigilators to best take into account the setting and security required in administering the test/examination.

The EPAO is responsible for ensuring the security of testing they administer to ensure the test remains valid and reliable (this includes any arrangements made using online tools). The EPAO is responsible for verifying the validity of the identity of the person taking the test.

This assessment method will be carried out as follows:

The 40 multiple-choice questions will be made up of:

- 30 multiple-choice questions that should have 4 options of which 1 will be correct.
- 10 multiple-choice questions which will be based on two given scenarios, 5 questions will be asked per scenario which will still require the apprentice to select 1 option from a choice of 4. These questions ensure the apprentice can demonstrate that they can identify which knowledge or learning is appropriate for the given situation. The given scenario will be up to 150 words long based on a true to life marketing scenario. For example the Scenario testing K5 might summarise a proposed new product launch, with the 5 multiple-choice questions asking respondents to identify which departments would be affected or need to be involved, and select the types of activities best suited to engage or work with those departments. For K14 the

scenario might describe a digital marketing campaign, with respondents asked to select which metrics would be most relevant, and identify the features and benefits of those metrics.

Multiple-choice tests should sample across the areas mapped to it to allow the test to determine the strength of the apprentice and avoid becoming too predictable.

The EPAO must source the venue for taking the test and the identity of the person taking the test.

### Marking

Tests must be marked by independent assessors or markers employed by the EPAO following a marking guide produced by the EPAO. Computer marking is also permissible, and is likely to be the preferred option, to improve marking reliability, speed of turnaround and cost efficiencies. The EPAO should notify the apprentice of the results within 4 weeks of taking the test.

Any incorrect or missing answers must be assigned 0 marks. Each correct answer will be assigned 1 mark.

### Question and resources development

Questions must be written and standardised by EPAOs and must be relevant to the occupation. EPAOs must develop 'question banks' of sufficient size to prevent predictability and review them regularly (and at least once a year) to ensure they, and the questions they contain, are fit for purpose (to avoid apprentice familiarity with the questions and to ensure they are current e.g. in terms of marketing practice/legislation/regulation).

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes.

### Required supporting material

As a minimum EPAOs will produce the following material to support this method:

- A test specification
- Sample tests and mark schemes
- Live tests and mark schemes
- Analysis reports which show areas of weakness for completed tests/exams and an invigilation policy

## Assessment Method 2: Work Based Project Showcase (This Method has 2 components.)

### Method 2 - Component 1: Work Based Project Report

#### Overview

The project is compiled after the apprentice has gone through the gateway process.

The work-based project should be designed to ensure that the apprentice's work meets the needs of the business, is relevant to their role and allows the relevant KSBs to be demonstrated for the EPA. Therefore the project's subject, title and scope will be agreed between the employer and the apprentice based on guidance and examples provided by the EPAO. The employer will ensure it has a real

business application and ensure it meets the requirements of the EPA (including suitable coverage of the KSBs assigned to this assessment method).

Given the large number of projects that will be completed per year. EPAOs will not be expected to sign-off each project title, subject and scope before the project commences. However, the EPAO should instead provide detailed specifications, suggested project titles and a template to enable the employer to select a project that will meet the requirements of the EPA. Where an employer has any concerns or queries regarding a project title, subject or scope they should discuss this with the EPAO prior to the apprentice commencing their project.

The rationale for this assessment method is:

This assessment method has been selected, as it is the most valid. Individuals in this occupation will be deployed on Marketing project work. This method will enable apprentices to demonstrate a range of KSBs on a real piece of work, which will add value to their employer. Employers have stated that any project that delivers real benefit to the business will be wholeheartedly supported by businesses. This means it is also cost effective.

## Delivery

Apprentices will produce a project in the form of a report.

The project is compiled after the apprentice has gone through the gateway process. The apprentice will conduct their project and submit it to the EPAO within 4 months of the EPA start date.

The employer will ensure the apprentice has sufficient time and the necessary resources, within this period, to plan and undertake the project.

Whilst completing the project, the apprentice should be subject to the supervision arrangements outlined below:

Normal line management controls. The apprentice may work as part of a team, which could include internal or external support, however the report will be the apprentice's own work and will be reflective of their own role and contribution.

The project report can be paper based or electronic, with electronic being the preferable method to aid efficiencies and speed of turnaround.

The project may be based on any of the following:

- Business specific need – such as a tactical marketing issue
- A specific problem
- A recurring issue
- A new business idea or opportunity

As a minimum all project reports must include:

- An introduction
- The scope of the project (including key performance indicators)
- How the outcomes were achieved
- A project plan
- Research and findings
- Project outcomes
- Recommendations and conclusions

- Appendices, these should include:
  - A presentation pack of 8-10 slides
  - Evidence of how the project was delivered
  - And a summary of how the project maps to the KSBs relevant to this assessment method

The project report will have a word limit of 3,500 and this does not include the required appendices and references. A tolerance of plus or minus 10% is allowed at the apprentice's discretion.

Appendices, references, diagrams will not be included in this total.

The project will be conducted as set out here:

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 Assistant. The project will be a real activity undertaken in their role and must demonstrate the KSBs mapped to this assessment method.

Examples of a project might include a small marketing project, activity, event or campaign. Depending on the organisation and its requirements this might be a small discrete project that is suited to a marketing assistant undertaking it on their own (such as a tactical campaign activity), or may be them undertaking a supporting role, or delivering a particular aspect, of a larger campaign or activity.

The apprentice should be able to identify their target market/audience for the activity, decide how best to communicate to that audience and plan and deliver a campaign tactic to deliver that.

The Project report should be based on these five aspects of the marketing process:

1. Sourcing Information and understanding the customer  
(K2, K4, K8, K18, S1, S10, B1, B5)
2. Creating Content to inform & influence your market  
(K10, K17, S7, S8, S12, B2, B7)
3. Delivering content to inform/influence the market  
(K9, S2, S3, S4, S6, S8, S9, B6, B9)
4. Analysing and measuring impact  
(K2, S1, S10, S11, S12, S13, B3, B5)
5. Your role as a marketer  
(B3, B4, B8)

The project report should include appendices 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, web analytics, other marketing tools used. This list is not definitive and other evidence sources are permissible. The evidence must be attributable to the apprentice, in part or in full.

The appendix should also include a presentation (8-10 slides), using appropriate presentation software. The presentation should be designed as a brief on the project to an internal audience, which summarises aspects 1-4 of the project report in the list above. The inclusion of the slides is designed to evidence the apprentice's ability to produce suitable presentations, as this is a key skill for the occupation and links to S12.

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The apprentice will need to consider the availability of company and external resources required to complete the project. They must also ensure they are fully aware of the KSBs the project is intended to assess as that is what the grading of the project will be based on. The project is likely to incorporate a stage review process. This is likely to be a monthly progress review with the employer, at the employer's request, to ensure the project and resources are on track as per the original project brief (as this is based on real work and this is usual business practice to ensure projects are on track).

The project report should be submitted by the apprentice to the EPAO within 4 months of the EPA start date. When the project is submitted, the employer and the apprentice should verify the submitted work is that of the apprentice, authenticating the apprentice's contributions to the project. This is achieved by an employer sign-off.

Additional verification will be checks for plagiarism, which should be undertaken by the EPAO.

## Marking

The independent assessor will review the project report in a timely manner, as determined by the EPAO, and without extending the EPA unnecessarily. Similarly all quality control processes will also be conducted in a timely manner, as determined by the EPAO.

## Required supporting material

EPAOs will produce the following material to support this assessment method:

- Full criteria and guidance for independent assessors on the project report, based on the criteria given in this plan
- Guidance for apprentices, their employers on the EPA – including example project titles, subject, scope and templates.
- Detailed marking and grading mechanism for the assessment method. This should include documentation for recording assessment evidence and decisions.
- Feedback template.

## Method 2 - Component 2: Competency based professional discussion underpinned by the project

### Overview

This assessment will take the form of a professional discussion, which must be appropriately structured to draw out the best of the apprentice's competence and excellence and cover the KSBs assigned to this assessment method.

The professional discussion can take place in any of the following:

- Employer's premises
- A suitable venue selected by the EPAO (e.g. a training provider's premises)
- Via videoconference (Skype etc)

The rationale for this assessment method is:

This assessment method was selected as a valid way to draw out KSBs and in particular the behaviours; which would be less likely to naturally evidence in the project report component. It is commonplace for people in this occupation to engage in detailed discussions and be able to communicate clearly so this assessment method mirrors their day-to-day work.

### Delivery

The independent assessors will conduct and assess the professional discussion.

The professional discussion must last 60 minutes. The independent assessor has the discretion to increase the time of the professional discussion by up to 10% to allow the apprentice to complete their last answer. Further time may be granted for apprentices with appropriate needs, for example where signing services are required.

During this method, the independent assessor must ask the apprentice a minimum of 10 open questions, they are able to combine questions from the EPAO's question bank and those generated by themselves following the review of the Project report. Up to 4 of the minimum 10 open questions asked can be generated by the independent assessor. In addition further follow up questions are then allowed to seek clarification.

The Professional Discussion will be conducted as set out here:

The Professional Discussion will allow validation of work delivered, discussion of any areas of the Work Based Project highlighted by the independent assessor during the review 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.

Questions must seek to assess KSBs mapped to this method not evidenced through the project report and or depth of understanding to assess performance against the distinction criteria.

Apprentices may refer to their Project report, evidence contained within the project report appendices (including the presentation slides) when answering the questions.

EPAOs must produce a question bank and guidance for independent assessors. The professional discussion should be video recorded.

Video conferencing (Skype etc) can be used to conduct the professional discussion, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided in some way.

The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the professional discussion.

The independent assessor will make all grading decisions. The work-based project report and professional discussion will be graded holistically – as one assessment method.

### Venue

The professional discussion should take place in a quiet room, free from distractions and influence.

## Other relevant information

A structured specification and question bank must be developed by EPAOs. The 'question bank' must be of sufficient size to prevent predictability and review it regularly (and at least once a year) to ensure that it, and its content, are fit for purpose. The specifications, including questions relating to the underpinning knowledge, skills and behaviours, must be varied yet allow assessment of the relevant KSBs.

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes.

Independent assessors must be developed and trained by the EPAO in the conduct of Professional Discussion and reaching a consistent judgement.

EPAOs will produce the following material to support this assessment method:

- Clear guidance for independent assessors on conducting the Professional Discussion
- Clear guidance for apprentices, their employers and training providers on the professional discussion
- Detailed marking and grading mechanism for the assessment method, based on the grading criteria set out in this plan. This should include documentation for recording assessment evidence and decisions
- Feedback template
- Professional Discussion question bank as defined above.

## Grading

### Assessment method 1: Knowledge test

#### Multiple Choice Questions:

| KSBs   | Fail   | Pass  | Distinction   |
|--|--|---|---|
| <b>K1 K3 K5 K6<br/>K7 K11 K12<br/>K13 K14 K15<br/>K16</b><br><br><b>S5</b><br><br><b>The 2<br/>scenario-<br/>based closed<br/>questions<br/>will test K5<br/>and K14</b> | Does not meet the pass criteria (apprentice has answered less than 20 questions correctly) | Apprenticeship has answered 20-31 questions correctly | Apprentice has answered 32 or more of the questions correctly |

The following grade boundaries apply to the test:

| Grade       | Minimum score | Maximum score |
|-------------|---------------|---------------|
| Distinction | 32            | 40            |
| Pass        | 20            | 31            |
| Fail        | 0             | 19            |

## Assessment method 2: Work Based Project Showcase

| KSBs   | Fail                            | Pass  | Distinction  |
|--|---------------------------------|---|--|
|  |                                 | The apprentice has demonstrated <b>all</b> the following criteria in the Project report and/or Professional Discussion components:  | <b>In addition to the pass criteria</b> , the apprentice has also demonstrated the following criteria:   |
| <b>K1 K2 K4 K8 K9<br/>K10 K17 K18</b><br><br><b>S1 S2 S3 S4 S6<br/>S7 S8 S9 S10 S11<br/>S12 S13</b><br><br><b>B1 B2 B3 B4 B5<br/>B6 B7 B8 B9</b> |                                 |   |  |
| Marketing Project Requirements<br><b>K1, K10, S7, S8,<br/>S9, S12, B7</b>  | Does not meet the pass criteria | <p>Demonstrates how they have planned, coordinated and monitored the specified marketing activity / event/ campaign on an ongoing basis, coordinating all elements to ensure it was working with and to agreed timescales, and resources. This will include evidence of use of appropriate systems/ processes to do this (S9, B7)</p> <p>Demonstrates use of copywriting and proofreading techniques to deliver accurate and persuasive text to meet the project's /target customers'</p> | <p>Write in a concise and engaging way i.e. it should be audience relevant and may include the use of appropriate charts/graphs, graphics and images (K10, S7, S8, B7)</p> <p>Identifies more than 1 recognised marketing theory/framework and compares and contrasts these when planning/delivering the marketing activity (K1)</p> |

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|   |  | <p>requirements (K10, S7, S8, B7)</p> <p>Produces written work/ text/ marketing documents/ presentations which are clearly structured and use appropriate software and presentation aides to support (K10, S12)</p> <p>Identifies at least 1 relevant recognised marketing theory/framework and demonstrates consideration of this when planning/delivering the marketing activity (K1)</p>  |   |
| <p>Sourcing Information and understanding the customer</p> <p><b>K2, K4, K8, K18, S1, S10, B1</b></p> | <p>Does not meet the pass criteria</p> | <p>Demonstrates collection of data and information from at least one suitable source during their project. (K2, S1)</p> <p>Demonstrates that they have used at least one suitable software system to research their target market/gather insight (K2, S1)</p> <p>Analyses and presents the relevant data/ insights/ information in a clear format and is able interpret what the customer insight gained means for their project, and how it supported their decisions (S10, B1)</p> <p>Describes the customer journey and identifies the customer segment/s relevant to the marketing activity being delivered in the project (K18)</p> <p>Identifies and shows consideration/use of existing organisational structures/processes when planning and delivering the project (K8)</p> <p>Demonstrates consideration of relevant Marketing ethics when</p> | <p>Demonstrate that their data/information collection/analysis included one more example, by using internal and external sources; and/or using qualitative and quantitative research methods; and/or using primary and secondary research. (S1, S10, B1)</p> <p>Can demonstrate that they have used a range of suitable software systems/tools to source information and understand the customer (S1, S10, B1)</p> <p>Provides evidence of further examination/insight into the stakeholder/customer groups impacted by the marketing activity/project demonstrated. (K18), 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 this to help inform their decisions. (B1)</p> <p>Articulates an understanding of the business and its plans, and shows that the project's marketing activity, outcome and</p> |

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|---|--|--|--|
|   |  | planning and delivering the project (K4)   | objectives have clear links to the employer's business requirements. (K8, S10, B1)   |
| <p>Creating Content to inform &amp; influence your market</p> <p><b>K17, S7, B2</b></p>           |  | <p>Identifies the available channels suited to the project including social media platforms (K17)</p> <p>Chooses an appropriate channel and writes accurate and appropriate content for the target audience giving at least one reason why they chose that medium/content relating this to the target customer's requirements (K17, S7)</p> <p>Describes why ethical behaviour in marketing is important, and shows consideration of equality and diversity in the work they have delivered (B2)</p>   | <p>Provides clear rationale/reasoning as to the choice of channel, for example by comparing and contrasting 2 or more channels and concluding which best meets the audience's needs and/or defined activity's objectives. (K17)</p>  |
| <p>Delivering content to inform/influence the market</p> <p><b>K9, S2, S3, S4, S6, B6, B9</b></p> |  | <p>Produces and provides examples of accurate content/collateral that is in line with brand requirements. The content/collateral shows evidence of creativity, for example when publishing text/images or video to a website or social media platform (S2, S3, B9)</p> <p>Uses appropriate business systems, software, technologies and processes to plan and deliver the objectives of the marketing activity in an efficient and effective manner. This may include appropriate use of high volume email delivery software and publishing via social media platforms (S3, S4)</p> <p>Demonstrates and provides evidence of making contact and collaborating with at least one internal and/or external</p> | <p>Uses an example to describe where they have proactively used their creativity during the project – for example by brainstorming new ideas with stakeholders, considering/pursuing new/different ways of working or approaches to the planning, delivery or evaluations of the project, coming up with an alternative solution when things haven't worked, or selecting visually creative ways to communicate in a concise, engaging, appropriate way (B6, B9)</p> <p>Demonstrates that the views of stakeholders have been analysed and taken into account when delivering the project (B6)</p> |

|   |  |  |  |
|---|--|--|--|
|   |  | <p>stakeholder (as appropriate for role/project). (B6)</p> <p>Expresses how they have briefed and worked with an external supplier/agencies as part of the project (K9, S6)</p>  |  |
| <p>Analysing and measuring impact</p> <p><b>S1, S10, S11, S13, B5</b></p> |  | <p>Identifies and utilises appropriate systems/software, including spreadsheets to evaluate and compile reports on the success of the marketing activity/campaign/event (S1, S11, S13)</p> <p>Can interpret what the evaluation of the marketing activity says – i.e. can describe how successful the activity/campaign was and presents this in a clear format and is able to utilise this information to describe/suggest what they might do differently in the future (S10, B5)</p> <p>Outlines the detail of their project and justify the decisions/ actions they took in relation to the marketing activity delivered (B5)</p> | <p>Appraises the impact measurement and analysis process to form recommendations about how future evaluation and evidence-gathering could be improved to gain better insights and understanding of the marketing activities (S1, S10, B5).</p>   |
| <p>Your role as a marketer</p> <p><b>B3, B4, B8</b></p>                   |  | <p>Describes how they have taken self motivated approach to personally see project tasks to completion – which can be illustrated through the use of examples where actions were required to ensure the task/project, did not stall e.g. chasing suppliers or stakeholders (B4)</p> <p>Can illustrate how they have been responsive/ flexible during the delivery of the</p>   | <p>Can demonstrate how they worked proactively or used their initiative during the project – for example how they considered and/or adapted their approach because of research highlighting a new situation such as a competitor activity, sector news story, political event etc (B3, B4)</p> |

|  |  |  |  |
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|  |  | <p>project, for example by demonstrating when they had to coordinate other work requests with delivery of the project or had to adapt their approach during the project (B8)</p> <p>Demonstrates how they took responsibility for their own development during the project – for example by undertaking independent research in new areas, researched competitor activity or a new technology/trend etc (B3)</p> |  |
|--|--|--|--|

## Weighting of assessment methods

The Project Showcase has a greater weighting on the overall grade outcome. This is because it is the most valid assessment method to test the apprentice's KSBs in a practical work environment. The Project Showcase also has significantly more KSBs assigned to it. In order to recognise the significance of the Project Showcase, the 2 assessment methods are combined as indicated in the next section to formulate the overall grade.

### Overall EPA grading

The overall grade is based on the following principles:

- An apprentice must achieve a pass in both assessment methods to achieve a pass overall
- An apprentice must achieve a distinction in the Work Based Project Showcase and a pass in the Knowledge test to achieve a merit overall
- An apprentice must achieve a distinction in both assessment methods to achieve a distinction overall

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

The Project Showcase has a greater weighting in the overall grade due to the importance of this method (which is the most valid to ensure the apprentice is demonstrating their KSBs in a work environment), and due to the greater the number of KSBs mapped to it. This means 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 Assistants who consistently demonstrate they have excelled in application of the knowledge, skills and behaviours, having achieved a distinction grade in both 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 the Knowledge Test.

The IA will make the judgement on the grade to be awarded to the apprentice, for each individual assessment method against the criteria for Fail, Pass or Distinction. These individual grades are then combined (as per table below) to reach the overall apprenticeship grade of fail, pass, merit or distinction.

Grades from individual assessment methods should be combined in the following way to determine the grade of the EPA as a whole:

| Knowledge Test Grade               | Project Showcase Grade | Overall Grade      |
|------------------------------------|------------------------|--------------------|
| <b>Fail in one or both methods</b> |                        | <b>Fail</b>        |
| Pass                               | Pass                   | <b>Pass</b>        |
| Distinction                        | Pass                   | <b>Pass</b>        |
| Pass                               | Distinction            | <b>Merit</b>       |
| Distinction                        | Distinction            | <b>Distinction</b> |

## Roles and responsibilities

| Role       | Responsibility   |
|------------|--|
| Apprentice | <ul style="list-style-type: none"> <li>• Participate in development opportunities to develop their knowledge skills and behaviours as outlined in the standard</li> <li>• Meet all gateway requirements when advised by the employer</li> <li>• Understand the purpose and importance of EPA and undertake the EPA</li> </ul>  |
| Employer   | <ul style="list-style-type: none"> <li>• Support the apprentice to achieve the KSBs outlined in the standard to their best ability</li> <li>• Determines when the apprentice is working at or above the level outlined in the standard and is ready for EPA</li> <li>• Select the EPAO</li> <li>• Confirm all EPA gateway requirements have been met (including agreeing the outline of the Work-Based Project with the apprentice)</li> <li>• Confirm arrangements with EPAO for the EPA (who, when, where) in a timely manner</li> <li>• Ensure apprentice is well prepared for the EPA</li> </ul>   |
| EPAO       | <p>As a minimum EPAOs should:</p> <ul style="list-style-type: none"> <li>• Understand the occupational role</li> <li>• Appoint administrators/invigilators and markers to administer/invigilate and mark the EPA</li> <li>• Provide training and CPD to the independent assessors they employ to undertake the EPA</li> <li>• Provide adequate information, advice and guidance documentation to enable apprentices, employers and providers to prepare for the EPA</li> <li>• Deliver the end-point assessment outlined in this EPA plan in a timely manner</li> <li>• Prepare and provide all required material and resources required for delivery of the EPA in-line with best practices</li> <li>• Use appropriate assessment recording documentation to ensure a clear and auditable mechanism for providing assessment decision feedback to the apprentice</li> <li>• Have no direct connection with the apprentice, their employer or training provider i.e. there must be no conflict of interest</li> <li>• Maintain robust internal quality assurance (IQA) procedures and processes, and conducts these on a regular basis</li> <li>• Conform to the requirements of the nominated external quality assurance body</li> <li>• Organise standardisation events and activities in accordance with this plan's IQA section</li> <li>• Organise and conduct moderation of independent assessors' marking in accordance with this plan</li> <li>• Have, and operate, an appeals process</li> <li>• Arrange for certification with the relevant training provider</li> </ul> |

|                      |   |
|----------------------|---|
| Independent assessor | <p>As a minimum an Independent assessor should:</p> <ul style="list-style-type: none"> <li>• Understand the standard and assessment plan</li> <li>• Deliver the end-point assessment in-line with the EPA plan</li> <li>• Comply to the IQA requirements of the EPAO</li> <li>• Be independent of the apprentice, their employer and training provider(s) i.e. there must be no conflict of interest</li> <li>• Satisfy the criteria outlined in this EPA plan</li> <li>• Have had training from their EPAO in terms of good assessment practice, operating the assessment tools and grading</li> <li>• Have the capability to assess the apprentice at this level (as defined in this plan)</li> <li>• Attend the required number of EPAOs standardisation and training events per year (as defined in the IQA section)</li> </ul> |
| Training provider    | <p>As a minimum the training provider should:</p> <ul style="list-style-type: none"> <li>• Work with the employer to ensure that the apprentice is given the opportunities to develop the KSBs outlined in the standard and monitor their progress during the on-programme period</li> <li>• Advise the employer, upon request, on the apprentice's readiness for EPA prior to the gateway</li> <li>• Plays no part in the EPA itself</li> </ul>  |

## Internal Quality Assurance (IQA)

Internal quality assurance refers to the requirements that EPA organisations must have in place to ensure consistent (reliable) and accurate (valid) assessment decisions. EPA organisations for this EPA must:

- Appoint independent assessors who are competent to deliver the end-point assessment and who meet the following minimum requirements:
  - Have recent relevant work experience of the occupation/sector at least one level above the apprentice gained in the last three years
  - Are members of a relevant professional body
  - They must hold a relevant qualification at least one level above the apprenticeship
  - Have at least 4 years' experience of working at least one level above the apprenticeship within the Marketing profession.
  - They must maintain the currency of their skills, knowledge and behaviours via evidenced continuous professional development (CPD).
- Provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading
- Have robust quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation and over time.
- Operate induction training and standardisation for independent assessors when they begin working for the EPAO on this standard and before they deliver an updated assessment method for the first time
- Ensure all assessors attend regular standardisation events and that as a minimum this attendance is at least once a year.
- Run the appeals process from appeals that arise from grading decisions
- Provides information and follows requirements requested by the External Quality Assurance (EQA) body
- Seeks feedback from employers, apprentices and training providers in order to shape future service improvements.

## Re-sits and re-takes

Apprentices who fail one or more assessment method will be offered the opportunity to take a re-sit or a re-take. A re-sit does not require further learning, whereas a re-take does.

Apprentices should have a supportive action plan to prepare for the re-sit or a re-take. The apprentice's employer will need to agree that either a re-sit or re-take is an appropriate course of action.

An apprentice who fails an assessment method, and therefore the EPA in the first instance, will be required to re-sit or re-take any failed assessment methods only.

Any assessment method re-sit or re-take must be taken during the maximum EPA period, otherwise the entire EPA must be taken again, unless in the opinion of the EPAO exceptional circumstances apply outside the control of the apprentice or their employer.

Re-sits and re-takes are not offered to apprentices wishing to move from pass to merit/distinction or merit to distinction.

Where any assessment method has to be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of distinction.

## Affordability

Affordability of the EPA will be aided by using at least some of the following practice:

- Online assessment and marking (where appropriate)
- Using an employer's premises
- Assessing multiple apprentices simultaneously
- Video-conference/Skype etc

## 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)

## Reasonable adjustments

The EPAO must have in place clear and fair arrangements for making reasonable adjustments for this apprenticeship standard. This should include how an apprentice qualifies for Reasonable Adjustment and what Reasonable Adjustments will be made. The adjustments must maintain the validity, reliability and integrity of the assessment methods outlined in this assessment plan.

# Mapping of knowledge, skills and behaviours (KSBs)

## Assessment method 1: Knowledge test

| Knowledge  |
|--|
| <b>K1</b> Marketing theory, concepts and basic principles e.g., what marketing is, the marketing mix (7Ps: product, price, place, promotion, physical environment, process, people), the promotional mix and the difference between its elements (advertising, sales, public relations etc), what a marketing plan is. |
| <b>K3</b> Legislation and regulatory frameworks affecting marketing operations, e.g. General Data Protection Regulation (GDPR)/eprivacy, trading laws, copyright law, Advertising Standards Authority (ASA)  |
| <b>K5</b> The Internal dependencies that positively and negatively influence the success of marketing, e.g. IT, finance, sales, operations   |
| <b>K6</b> Primary and secondary research and the different sources of primary and secondary research data  |
| <b>K7</b> Brand theory (positioning/value/identity/guidelines) to a basic level  |
| <b>K11</b> Search engine optimisation techniques and effective video production and publishing practice  |
| <b>K12</b> The benefits of a customer relationship management system   |
| <b>K13</b> The benefits of marketing automation processes and systems  |
| <b>K14</b> The metrics relevant to the delivery and evaluation of marketing activity, and an understanding of which are most relevant to that activity   |
| <b>K15</b> Budgeting principles and good procurement practice  |
| <b>K16</b> Importance of planning and maintaining offline and digital assets   |

| Skills   |
|--|
| <b>S5</b> Organise offline and digital assets in a coordinated and legally compliant way (there may be several pieces of legislation that a Marketing Assistant may need to comply with, these should be relevant to the sector they work in and the type of activity. Examples include GDPR; Consumer Protection from Unfair Trading Regulations 2008; Consumer Credit Act; Copyright, Designs and Patents Act) |

| Behaviours |
|------------|
|------------|

None

## Assessment method 2: Work Based Project Showcase

| Knowledge  |
|--|
| <b>K1</b> Marketing theory, concepts and basic principles e.g., what marketing is, the marketing mix (7Ps: product, price, place, promotion, physical environment, process, people), the promotional mix and the difference between its elements (advertising, sales, public relations etc), what a marketing plan is.                       |
| <b>K2</b> Current technologies such as systems and software, that can help deliver effective marketing planning (research), delivery and evaluation  |
| <b>K4</b> Principles of Marketing ethics such as targeting vulnerable adults and children; principles of conducting marketing communications in a legal, decent and honest manner, advertising being clearly differentiated from news/entertainment, ensuring consumer data is never compromised and marketing strategies avoid stereotyping |
| <b>K8</b> How marketing fits within organisational structures and processes  |
| <b>K9</b> How to brief and manage external marketing suppliers, and an understanding of the risks to ineffective briefing/management   |
| <b>K10</b> Copywriting and proofreading techniques   |
| <b>K17</b> Awareness of social media platforms appropriate to customer and business segments   |
| <b>K18</b> The customer journey and the customer segments relevant to their market   |

| Skills   |
|--|
| <b>S1</b> Use research/survey software to gather audience insight and/or evaluation  |
| <b>S2</b> Applying creativity to use a website content management system to publish text, images and video/animated content  |
| <b>S3</b> Use a social media platform to publish text, images and video content  |
| <b>S4</b> Use high volume email delivery software to acquire and/or retain one or more market segments and understand the response   |
| <b>S6</b> Able to compile briefs for an external marketing supplier (e.g. printer/display stand producer/graphic designer etc) and oversee successful delivery in-line with specification  |
| <b>S7</b> Write persuasive text to meet a marketing communications objective, using common copywriting techniques such as adapting writing style to ensure it is appropriate to different channels in-line with organisational brand guidelines. |
| <b>S8</b> Proofread marketing copy to ensure that it is accurate, persuasive and legally compliant and is on brand.  |
| <b>S9</b> Able to plan and coordinate a marketing activity (external and/or internal) comprising several different marketing tactics to acquire or retain one or more customer segments. Carries out the tasks within known resources.           |

|  |
|--|
| <b>S10</b> Analyse and present defined external and internal marketing data to inform discussions about planning, delivery and/or evaluation of marketing activities/brand performance.  |
| <b>S11</b> Spreadsheets - create and maintain spreadsheets using common business software, e.g. Excel, Numbers, in support of marketing activities (such as project/budget planning and monitoring, and to support organisation of marketing assets)   |
| <b>S12</b> Presentations - compile and present marketing information (e.g. to inform internal stakeholders of the results of a marketing tactic or present ideas for future marketing tactics) using common business software, e.g. PowerPoint. Basic presentation skills to deliver these findings. |
| <b>S13</b> Compile a report from a marketing system/software, e.g. CRM, Google Analytics, Dotmailer  |

| Behaviours  |
|---|
| <b>B1</b> Professional and customer focussed, shows commitment to putting the customer at the centre of marketing activities  |
| <b>B2</b> Apply ethical behaviour in planning, delivery and evaluation of marketing activity. Including carrying out activity in a way that values equality and diversity   |
| <b>B3</b> Commitment to continuous development of self and marketing activities through own initiative, within scope of own responsibility, keeping abreast of external developments including competitor and market trends |
| <b>B4</b> Self-motivated - takes responsibility for own actions   |
| <b>B5</b> Reflective and analytical, solving problems with internal and external sources of intelligence and data with a commitment to using evidence to support decisions.   |
| <b>B6</b> Collaborative, consultative and supportive to achieve marketing outcomes, good listener, shows empathy with the views of others   |
| <b>B7</b> Strong attention to detail  |
| <b>B8</b> Responsive and flexible, able to work at pace within deadlines balancing short and long term priorities (multitask)   |
| <b>B9</b> Shows creativity in their approach to work  |