PEARSON

Apprenticeships in

Sales, Marketing and Procurement

Pearson Level 3 End-point Assessment for
Multi-channel Marketer

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Specification date: October 2024

First assessment date: January 2025

About Pearson

We are the world's leading learning company operating in countries all around the world. We provide content, assessment and digital services to schools, colleges and universities, as well as professional and vocational education to learners to help increase their skills and lifelong employability prospects. We believe that wherever learning flourishes so do people.

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All information in this specification is correct at time of publication.

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1   The Multi-channel Marketer Apprenticeship

What are Pearson End-point Assessments?

End-point assessment (EPA) takes place at the end of the apprenticeship programme when the apprentice has passed through gateway and been signed off as ready for the assessment by their employer. It is a synoptic assessment of the knowledge, skills and behaviours outlined in the apprenticeship standard learnt throughout the apprenticeship programme.

Purpose

The purpose of the EPA is to confirm that the apprentice has met the required level of knowledge, skills and behavioural standards set by employers and that they are competent in their role as a Multi-channel Marketer.

In their role, Multi-channel Marketers are responsible for delivering day-to-day marketing activities across a multitude of platforms, channels and systems, for example coordinating and delivering specific marketing activities such as marketing content creation, background market and customer research, monitoring campaign analytic and collecting data, using relevant marketing software/systems, maintaining marketing administration activities such as managing the supply of marketing literature, tracking marketing expenditure, supporting the procurement of, and overseeing the delivery of work by external and internal marketing suppliers.

They work as part of the Marketing team and will contribute to the implementation of the Marketing strategy and plans, for example they will define, design, build and implement campaigns across a variety of platforms to drive customer engagement and retention. In addition, they will be responsible for parts of the campaign within their area of responsibility. As part of the Marketing team, they will contribute to the implementation of the Marketing strategy and plans and will have responsibility for elements of the overall marketing plan.

Multi-channel marketers will interact with a wide range of internal stakeholders such as members of their own team, other departments such as sales, operations, public relations, IT, HR, customer services, senior management and finance.

They also interact with external stakeholders such as clients/customers and suppliers such as printers, digital agencies, PR and media agencies, event display companies, market research agencies, and media sales professionals. They will be the first point of contact for day-to-day activities in the marketing team and will be responsible for allocating higher levels of work to the management team. This role will work on their own and in a range of team settings. They work within agreed budgets and available resources.

Multi-channel marketers work without high levels of supervision, usually reporting to senior stakeholders. They may occasionally be responsible for decision making on smaller areas of campaigns, but more often will support or influence the decisions of others.

This apprenticeship aligns with:

- Chartered Institute of Marketing (CIM) for Affiliate.

- Digital Marketing Institute (DMI) for Power

- Data and Marketing Association (DMA) for Individual.

The apprenticeship will either wholly or partially satisfy the requirements for registration at this level.

Industry support and recognition

Pearson has worked in close collaboration with employers, other assessment organisations and experts from professional bodies and training providers in developing the assessment tools for this EPA. We are grateful to all who have generously shared their time and expertise to help us in the development process.

Employers, assessment organisations, professional bodies and further education providers that have worked with us include:

- Pro Apprenticeships.

2   Summary of End-point Assessment

EPA Detail	Pearson Level 3 End-point Assessment for Multi-channel Marketer
Qualification number (QN)	610/4849/5
Regulation start date	09/10/2024
First Pearson assessment	01/01/2025
Assessment Methods	• Project Report with Presentation and Questioning • Interview underpinned by Portfolio of Evidence *Refer to Section 5 for detailed information about each assessment method.*
Grading	Pass/Merit/Distinction *Refer to Section 3 for detailed information.*
Duration of apprenticeship programme	The typical duration for this apprenticeship is 18 months but this will depend on the individual apprentice's previous experience and access to opportunities to gain the full range of competences. All apprentices must spend at least 12 months on-programme. All apprentices must complete the required amount of off-the-job training specified by the apprenticeship funding rules.
Gateway requirements	• Employer confident that the apprentice is working at or above the occupational standard as a Multi-channel Marketer. • Maths and English requirements in line with the apprenticeship funding rules. • For the Project Report with Presentation and Questioning the apprentice must submit project scoping document. The apprentice must agree the subject, title and scope for their Project with their employer and end-point assessment organisation (EPAO) by submitting a scoping document which will be no more than 500 words. This will not be assessed by the independent assessor.

EPA Detail	Pearson Level 3 End-point Assessment for Multi-channel Marketer
	• For the Interview underpinned by Portfolio of Evidence the apprentice must submit a Portfolio of Evidence. • The apprentice must submit any policies and procedures as requested by the EPAO.
Time period for completion of EPA	The EPA period is typically five months.
Apprenticeship certification	The certificate for the apprenticeship is awarded by the Institute for Apprenticeships and Technical Education (IfATE), through a process administered by the Education and Skills Funding Agency (ESFA). As the end-point assessment organisation, Pearson will claim certificates on behalf of apprentices.
Digital badging	On successful completion of their EPA, apprentices are issued a securely verified Credly digital credential or 'badge'. The digital badge can be easily shared online via social networks, allowing them to showcase their talent and grow their presence in a professional community. Further information about Credly digital credentials can be found at www.pearson.com/en-gb.html (Discover Pearson Businesses).

3   EPA Structure

Multi-channel Marketer

The EPA for the Pearson Level 3 End-point Assessment for Multi-channel Marketer apprenticeship consists of the following two assessment methods:

- Project Report with Presentation and Questioning

- Interview underpinned by Portfolio of Evidence.

The table below gives a summary of the structure of the End-point Assessment.

End-point Assessment Methods	Duration	Assessment Method Grading
Project Report with Presentation and Questioning	12 weeks to complete the report 45 minutes for presentation and questioning	Fail/Pass/Distinction
Interview underpinned by Portfolio of Evidence	60 minutes	Fail/Pass/Distinction

The assessment methods can be delivered in any order.

The result of one assessment method does not need to be known before starting the next.

EPA grading

The grading for this EPA is Fail/Pass/Merit/Distinction.

Pearson will combine the individual assessment method grades to determine the overall EPA grade.

- If the apprentice fails one or more assessment methods, they will be awarded an overall EPA fail.

- To achieve an overall pass, the apprentice must achieve at least a pass in all the assessment methods.

- To achieve an overall merit, the apprentice must achieve a pass in the Project Report with Presentation and Questioning or the Interview underpinned by Portfolio of Evidence and achieve a distinction in the other assessment method.

- To achieve an overall EPA distinction, the apprentice must achieve a distinction in both assessment methods.

- An apprentice will get a maximum EPA grade of pass for a re-sit or re-take, unless Pearson determines there are exceptional circumstances.

The table below shows how the grades from each end-point assessment method are combined to determine the overall end-point assessment grade.

Project Report with Presentation and Questioning	Interview underpinned by Portfolio of Evidence	End-point Assessment Grade
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Merit
Distinction	Pass	Merit
Distinction	Distinction	Distinction

4   Assessment

Assessment plan

Pearson's approach to assessing this EPA is set by the assessment plan for the apprenticeship standard. This document is available in *Annexe A*.

Language of assessment

Apprentices must use English only during the assessment of this EPA.

An apprentice taking the EPA may be assessed in British Sign Language for the purpose of reasonable adjustment.

Further information on the use of language in assessment is available in our *Use of languages in qualifications policy*, available on our website.

Gateway

Before progressing to the EPA from on-programme, all apprentices must be signed off by their employer, through the 'gateway'. This gateway sign off confirms that apprentices have the level of occupational knowledge, skills and behaviours required to achieve the apprenticeship.

The EPA-specific requirements for gateway are stated in *Section 2: Summary of End- point Assessment* and the assessment plan in *Annexe A.*

Employers must complete a *Gateway Declaration Form and Portfolio Authentication Form* (see *EPA Resource Pack*) with the apprentice. The form and the associated gateway evidence to prove apprentices have met the requirements must be supplied to Pearson before the EPA can take place.

5   End-point Assessment Methods

Assessment Method 1: Project Report with Presentation and Questioning

Structure

The Project Report with Presentation and Questioning assesses apprentices' knowledge, skills and behaviours from the apprenticeship standard, in line with the assessment plan requirements. It is assessed by a Pearson independent end-point assessor (IEA).

Project Report with Presentation and Questioning	
Summary	The Project Report with Presentation and Questioning involves the apprentice completing a significant and defined piece of work that has a real business application and benefit. The Project must meet the needs of the employer's business and be relevant to the apprentice's occupation and apprenticeship.
	This assessment method has two components:
	• Project with a project output
	• Presentation with questions and answers.
	At the gateway, apprentices submit to Pearson their 500-word project outline. Once this is signed off, they complete their Project, create a 2500-word (+/− 10%) project report summary and supporting presentation. On an agreed date and time, they deliver their presentation to the IEA, who will ask questions.
Duration	12 weeks to complete the Project report and presentation. The research and written Project Report must start after the apprentice has gone through the gateway.
	45 minutes (+10%) for presentation delivery and IEA questioning (typically 20 minutes for the presentation and 25 minutes of IEA questioning).

Project Report with Presentation and Questioning	
Grading	Fail/Pass/Distinction
	To achieve a pass – apprentices must demonstrate all the pass descriptors.
	To achieve a distinction – apprentices must demonstrate all the pass descriptors and all the distinction descriptors.
	The grading criteria for this assessment method can be found in the assessment plan in *Annexe A.*
Preparation	Apprentices must use the documents published in the *EPA Resource Pack* to support their preparation.
Delivery and conduct	Apprentices have a maximum of 12 weeks to complete the work-based Project, report and presentation (starting when their project outline is signed off after the gateway).
	The Project is submitted to Pearson in the form of a 2500-word (with a tolerance of +/− 10%) report and presentation output, together with their supporting presentation. The apprentice must produce and include a mapping in an appendix, showing how the report evidences the knowledge, skills and behaviours (KSBs) mapped to this assessment method.
	The apprentice delivers the presentation of their report to the IEA at a date/time agreed, either face to face or via online video. The IEA will also ask questions to ensure full coverage of the mapped KSBs. The presentation with questioning will take place at a location away from the apprentice's normal working environment.
Assessment	The IEA assesses the evidence from the Project, presentation and questions holistically against the grade criteria mapped to this assessment method, using the associated assessment guidance (published in the *EPA Resource Pack*).

Standards assessed

The Project assesses the following outcomes from the Apprenticeship Standard:

Apprenticeship Standard Knowledge Outcomes
K2 The business' structure, vision, priorities, and objectives, and how their marketing role supports these.
K3 Business tools used to measure the impact of business objectives, the wider environment and sustainability on marketing activities.
K6 Brand theory such as positioning, value, identity, guidelines, and tone of voice.
K11 How internal stakeholders work to support the delivery of all marketing campaigns.
K14 Adapt communications for appropriate stakeholders and internal audiences.
K17 The metrics for the delivery and evaluation of marketing activity.
K18 The importance of reviewing campaigns regularly to ensure effectiveness and optimisation.
K19 The campaign management process including research, planning, budgeting, implementation, and delivery.
K20 Tools used to support campaign management such as social media, Gantt charts, data analytics, and project management software.

Apprenticeship Standard Skills Outcomes
S1 Develop or interpret briefs for external or internal stakeholders and measure delivery in-line with the specification and agreed timelines.
S2 Plan and coordinate a marketing activity using marketing tactics to acquire and retain one or more customer segments using available resources.
S3 Contribute to the generation of innovative and creative approaches across video, images, and other formats, both **online** and **offline**, to support campaign development.
S4 Use research/survey software to gather audience insight and/or evaluation to support the Project.
S5 Use copywriting techniques to write persuasive text/copy to meet a communications objective ensuring it is in line with organisational brand guidelines.
S7 Proofread marketing copy ensuring it is accurate, persuasive and is on brand.
S12 Create and maintain spreadsheets to support marketing activities such as project/budget planning and organisation of marketing assets.
S13 Use technology and software packages to support day to day activities, e.g. stakeholder communications, development of briefs, data analysis, report writing, presentations and project management.

Apprenticeship Standard Skills Outcomes
S14 Identify and use data and technologies to achieve marketing objectives.
S16 Review campaigns regularly to ensure effectiveness, to optimise the results.
S17 Measure and evaluate campaign delivery to identify areas for improvement.

Apprenticeship Standard Behaviour Outcomes
B1 Has accountability and ownership of their tasks and workload.
B2 Takes responsibility, shows initiative and is organised.
B4 Works collaboratively with others across the organisation and external stakeholders.

Assessment Method 2: Interview underpinned by Portfolio of Evidence

Structure

The Interview underpinned by Portfolio of Evidence assesses apprentices' knowledge, skills and behaviours from the apprenticeship standard, in line with the assessment plan requirements. It is assessed by a Pearson independent end-point assessor (IEA).

Interview Underpinned by Portfolio of Evidence	
Summary	The Interview underpinned by Portfolio of Evidence involves the IEA asking the apprentice at least six questions based on eight themes: • Marketing methods, principles and practices • Regulation and legislation • Marketing communications • Customer experience and the customer journey • Research and campaign planning • IT and digital tools • Campaign implementation and management • Data analysis and marketing evaluation. The apprentice can refer to and illustrate their answers with evidence from their Portfolio of Evidence. The portfolio itself is not directly assessed or graded, it is used to underpin the apprentice interview question responses in meeting the grade criteria and associated assessment guidance. The assessment guidance and guidance on suitable types of evidence can be found in the *EPA Resource Pack*.
Duration	60 minutes; the IEA can increase this by up to 10%.
Portfolio	Apprentices are required to provide work-based evidence in a portfolio typically containing 12 discrete pieces of evidence to validate and underpin their responses in the Interview. This portfolio is submitted at gateway.
Grading	Fail/Pass/Distinction To achieve a pass – apprentices need to meet all the pass grade criteria.

Interview Underpinned by Portfolio of Evidence	
	To achieve a distinction – apprentices need to meet all the pass and distinction grade criteria. The grading criteria for this assessment method can be found in the assessment plan in *Annexe A.*
Preparation	Apprentices must use the documents published in the *EPA Resource Pack* to support their preparation.
Delivery and conduct	The Interview will be conducted face to face or remotely. It must take place in a quiet space away from the apprentice's normal working environment. The IEA will ask the apprentice a minimum of **six** questions and apprentices will present their work-based evidence in response. Follow-up questions are allowed where clarification is required. The IEA will take notes and the Interview will be audio or video recorded. The purpose of the independent assessor's questions will be to enable the apprentice to demonstrate competence in the knowledge, skills and behaviours mapped to this assessment method.
Assessment	The IEA will review the apprentice's responses against the pass and distinction grade criteria using the evidence requirements in the *EPA Resource Pack* as guidance.

Standards assessed

The Interview assesses the following outcomes from the Apprenticeship Standard.

Apprenticeship Standard Knowledge Outcomes
K1 Marketing theory, concepts and basic principles such as what marketing is, the marketing mix the promotional mix and the differences between each channel used.
K4 What a marketing plan is, how it is built and its purpose.
K5 The importance of competitor analysis and how to undertake it.
K7 Create content using principles of design and copywriting, and how to adapt for **online** and **offline** mediums, e.g. writing digital content for the web compared to leaflets.
K8 Current and emerging technologies, software and systems which impact on marketing.

Apprenticeship Standard Knowledge Outcomes
K9 Relevant regulatory and legislative requirements such as data protection, GDPR, cyber security, trading laws, and copyright law for the handling and processing of data and its application.
K10 Principles of conducting marketing communications in an ethical and diverse manner.
K12 Common marketing channels, cross channel behaviour, and how to manage and operate an integrated campaign using **online** and **offline** channels.
K13 How to brief and manage external marketing suppliers.
K15 The principles of content marketing and content creation.
K16 Budget management and how to measure return on investment (ROI).
K21 The customer journey including customer offline and digital touchpoints, customer personas, how to engage customers at different stages of their journey, sales funnels and how to segment an audience for targeting.
K22 The impact marketing has on the level of customer service or the customer experience, including community management channels.
K23 Quality management and the maintenance of **online** and **offline** assets.

Apprenticeship Standard Skills Outcomes
S6 Build and implement multi-channel campaigns across a variety of platforms, either offline or digital media.
S8 Use software to design and create marketing assets to meet the technical specification.
S9 Contribute to the research of external suppliers to support recommendations and procurement of marketing goods and services.
S10 Organise offline and digital assets ensuring they are co-ordinated and legally compliant.
S11 Use a website content management system to publish text, images, and video/animated content.
S15 Monitor and amend campaigns to meet budget requirements including time and monetary costs.
S18 Use data analysis tools to record, interpret and analyse customer or campaign data.

Apprenticeship Standard Behaviour Outcomes
B3 Works flexibly and adapts to circumstances.
B5 Seeks learning opportunities and continuous professional development.

Apprenticeship Standard Behaviour Outcomes
B6 Acts in a professional manner with integrity and confidentiality.

6 Delivery of End-point Assessment

End-point assessment planning and scheduling

Employers and/or training providers must have an agreement in place to conduct EPAs with Pearson, and apprentices must be registered on the ACE360 system. Once the gateway evidence has been uploaded to ACE360, this will alert the IEA to review the evidence and start the planning and scheduling process.

The purpose of the EPA planning meeting is to share information with the IEA in order to support the assessment process and to agree a plan for the upcoming assessment activities for the apprentices. The IEA will agree a plan and schedule for each assessment activity. The end-point assessment planning meeting can be conducted remotely using appropriate technology.

All assessment methods must be completed within the time period specified in *Section 2: Summary of End-point Assessment.*

Reassessment

Reassessment, including both re-sit and re-take, is permitted in agreement between Pearson and the employer. The timescale will be agreed on a case-by-case basis with Pearson. As part of that agreement, any reassessments must not provide an apprentice with an unfair advantage over others.

The employer and EPAO agree the timescale for a re-sit or re-take. A re-sit is typically taken within two months of the EPA outcome notification. The timescale for a re-take is dependent on how much re-training is required and is typically taken within three months of the EPA outcome notification.

Failed assessment methods must be re-sat or re-taken within a six-month period from the EPA outcome notification, otherwise the entire EPA will need to be re-sat or re-taken in full.

Re-sits and re-takes are not offered to an apprentice wishing to move from pass to a higher grade.

If the apprentice fails the project assessment method, they will be required to amend the project output in line with the IEA's feedback. The apprentice will be given four weeks to rework and submit the amended report.

An apprentice will get a maximum EPA grade of pass for a re-sit or re-take, unless the EPAO determines there are exceptional circumstances.

For additional EPA-specific requirements, refer to the assessment plan in *Annexe A.*

Booking reassessment

Reassessment is requested using the ACE360 system. Once the request is confirmed, the allocated IEA will liaise with the key contact to start the scheduling process.

Appeals

The *End-point assessment enquiries and appeals policy* is available on the Pearson website and ACE Knowledge base. This has full information about what will happen if an apprentice or centre wishes to query the result of an assessment.

7   Access to Assessment

Access to assessment for apprentices with disabilities or specific needs

Equality and fairness are central to our work. Our *Equity, diversity and inclusion in Pearson qualifications and related services policy* requires all apprentices to have equal opportunity to access our assessments, and that our EPAs are awarded in a way that is fair to every apprentice.

We are committed to making sure that:

- apprentices with a protected characteristic (as defined by the Equality Act 2010) are not, when they are taking one of our assessments, disadvantaged in comparison to apprentices who do not share that characteristic
- all apprentices achieve the recognition they deserve from their EPA and that this achievement can be compared fairly to the achievement of their peers.

For apprentices with disabilities and specific needs, the assessment of their potential to achieve the EPA must identify, where appropriate, the support that will be made available to them during delivery and assessment.

Centres must deliver the EPA in accordance with current equality legislation. For full details of the Equality Act 2010, please visit www.legislation.gov.uk

Reasonable adjustments

A reasonable adjustment relates to an adjustment that helps to reduce the effect of a disability or a physical or mental health condition, which may place the apprentice at a disadvantage compared to others. If an apprentice requires any adjustment to their assessment than this must be recorded within the ACE360 system to support the discussion at the EPA planning meeting.

Pearson will apply the *Reasonable adjustment matrix* published by the Institute for Apprenticeships and Technical Education (IfATE).

Further guidance: Submitting Reasonable Adjustments Requests

8   Malpractice

Dealing with malpractice in assessment

'Malpractice' refers to acts that undermine the integrity and validity of assessment, the certification of qualifications and/or may damage the authority of those responsible for delivering the assessment and certification.

Pearson does not tolerate actual or attempted malpractice by apprentices, centre staff or centres in connection with Pearson qualifications. Pearson may impose sanctions on apprentices, centre staff or centres where malpractice or attempted malpractice has been proven.

Malpractice may occur or be suspected in relation to any unit or type of assessment within a qualification. For further details on malpractice and advice on preventing malpractice by apprentices, please see Pearson's *Centre Guidance: Dealing with Malpractice*, available on our website.

Centres are required to take steps to prevent malpractice and to assist with investigating instances of suspected malpractice. Apprentices must be given information that explains what malpractice is and how suspected incidents will be dealt with by the centre. The *Centre Guidance: Dealing with Malpractice* document gives full information on the actions we expect you to take.

Pearson may conduct investigations if we believe a centre is failing to conduct assessments according to our policies. The above document gives further information, examples, and details the sanctions that may be imposed.

In the interests of apprentices and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

Apprentice malpractice

The head of centre is required to report incidents of suspected apprentice malpractice that occur during the delivery of Pearson qualifications. We ask centres to complete JCQ Form M1 (www.jcq.org.uk/malpractice) and email it with any supporting documents (signed statements from the apprentice, invigilator, copies of evidence, etc) to the Investigations Processing team at candidatemalpractice@pearson.com. The responsibility for determining any appropriate sanctions on apprentices lies with Pearson.

Apprentices must be informed at the earliest opportunity of the specific allegation and the centre's malpractice policy, including the right of appeal. Apprentices found guilty of malpractice may be disqualified from the qualification for which they have been entered with Pearson. Failure to report malpractice constitutes staff or centre malpractice.

Onscreen testing – Rogo

Please note that should a Rogo test recording be flagged for further review, the malpractice team will investigate whether JCQ rules have been adhered to. This will extend the agreed timeframe from five working days, until the investigation has been concluded. Further information can be found here [End-point Assessment: Rogo - EPA Knowledge Test Results (pearson.com).](#)

Tutor/centre malpractice

The head of centre is required to inform Pearson's Investigations team of any incident of suspected malpractice (which includes maladministration) by centre staff, before any investigation is undertaken. The head of centre should inform the Investigations team by submitting a JCQ M2 Form (downloadable from www.jcq.org.uk/malpractice) with supporting documentation to pqsmalpractice@pearson.com. Where Pearson receives allegations of malpractice from other sources (for example Pearson staff, anonymous informants), the Investigations team will conduct the investigation directly or may ask the head of centre to assist.

Pearson reserves the right in cases of suspected malpractice to withhold the issuing of results/certificates while an investigation is in progress. Depending on the outcome of the investigation, results and/or certificates may not be released or they may be withheld.

You should be aware that Pearson may need to suspend certification when undertaking investigations, audits and quality assurances processes. You will be notified within a reasonable period of time if this occurs.

Sanctions and appeals

Where malpractice is proven, we may impose sanctions such as:

- mark reduction for affected assessments
- disqualification from the qualification
- debarment from registration for Pearson qualifications for a period of time.

If we are concerned about your centre's quality procedures we may impose sanctions such as:

- requiring centres to create an improvement action plan
- requiring staff members to receive further training
- placing temporary suspensions on certification of apprentices
- placing temporary suspensions on registration of apprentices

- debarring staff members or the centre from delivering Pearson qualifications

- suspending or withdrawing centre approval status.

The centre will be notified if any of these apply.

Pearson has established procedures for considering appeals against sanctions arising from malpractice. Appeals against a decision made by Pearson will normally be accepted only from the head of centre (on behalf of apprentices and/or members or staff) and from individual members (in respect of a decision taken against them personally). Further information on appeals can be found in the JCQ Appeals booklet (https://www.jcq.org.uk/exams-office/appeals).

9   Further Information

Edexcel, BTEC and Pearson Work Based Learning contact details:

- https://qualifications.pearson.com/en/contact-us.html

Books, software and online resources for UK schools and colleges:

- www.pearsonschoolsandfecolleges.co.uk

Document that further supports the information in this specification:

- *EPA Service Guide* (Pearson, this is made available to approved centres).

10   Glossary

Term	Description
Apprenticeship Standard	A short document prepared by a Trailblazer group that sets out concisely the requirements to be competent in a job role. All apprenticeship standards are published on www.gov.uk.
Assessment Plan	This document is also prepared by a Trailblazer group and sets out the requirements that end-point assessment organisations must follow when assessing the EPA.
Assessment Methods	The different assessments that form the overarching EPA. Most EPAs will typically have between two and four assessment methods that assess set parts of the overarching standard.
Competence	The minimum knowledge, skills and behaviours (KSBs) required to perform a job role effectively.
End-point Assessment	A synoptic assessment of the knowledge, skills and behaviours outlined in the apprenticeship standard that have been learned throughout the apprenticeship programme. The apprentice has to pass the EPA to be successful in their apprenticeship programme and demonstrate competence.
End-point Assessment Organisation (EPAO)	Approved to deliver EPA. Employers select an approved EPAO from the Education & Skills Funding Agency's Register of end-point assessment organisations (RoEPAO).
Gateway	The point at which the apprentice is identified as being competent by their employer and therefore ready to plan to take their end-point assessment. There are requirements for maths and English to enter gateway and there may be other requirements, such as mandatory qualifications, that vary depending on the apprenticeship standard.
Institute for Apprenticeships and Technical Education (IfATE)	IfATE is a non-departmental public body that oversees the development, approval and publication of apprenticeship standards and assessment plans. In addition, the institute is responsible for technical education, including T Levels.
Independent End-point Assessor	The assessor appointed by Pearson to work with the apprentice and employer to plan their EPA during gateway and then assess the apprentice in the final EPA.

Term	Description
On-programme	The first and main part of the apprenticeship when the apprentice is developing their KSBs towards competence. All apprentices must complete the required amount of off-the-job training specified by the apprenticeship funding rules.
Resit	Occurs when an apprentice feels comfortable to attempt their EPA again, with no additional training or learning, e.g. failing an assessment method on one or two criteria, due to test nerves
Retake	Occurs when an apprentice needs a period of additional training or learning to support them to reattempt their EPA, e.g. failing an assessment method on multiple criteria, due to lack of preparation or not being able to articulate their response in line with the criteria
Trailblazer group	A group of employers who have worked together to agree the apprenticeship standard and write the associated assessment plan.

Annexe A: Assessment Plan V1.0

Multi-channel marketer

Key information

Minimum duration to gateway: 18 months

Typical EPA period: 5 months

Maximum funding: £11000

Route:

Date updated: 12/12/2023

Approved for delivery: 11 December 2023

Lars code: 737

EQA provider: Ofqual

Example progression routes:
Sales, marketing and procurement

Review: this apprenticeship will be reviewed in accordance with our change request policy

End-point assessment plan

Introduction and overview

This document explains the requirements for end-point assessment (EPA) for the Multi-channel marketer apprenticeship. End-point assessment organisations (EPAOs) must follow this when designing and delivering the EPA.

Multi-channel marketer apprentices, their employers and training providers should read this document.

An approved EPAO must conduct the EPA for this apprenticeship. Employers must select an approved EPAO from the Education and Skills Funding Agency's Register of end-point assessment organisations (RoEPAO).

A full-time apprentice typically spends 18 months on-programme (this means in training before the gateway) working towards competence as a multi- channel marketer. All apprentices must spend at least 12 months on-programme. All apprentices must complete the required amount of on-the-job training specified by the apprenticeship funding rules.

This EPA has 2 assessment methods.

The grades available for each assessment method are:

Assessment method 1 – Written Project Report with Presentation and Questioning:

- fail

- pass

- distinction.

Assessment method 2 – Interview underpinned by Portfolio of Evidence:

- fail

- pass

- distinction.

The result from each assessment method is combined to decide the overall apprenticeship grade. The following grades are available for the apprenticeship:

- fail

- pass

- merit

- distinction.

EPA summary table

On-programme – typically 18 months	The apprentice must complete training to develop the knowledge, skills and behaviours (KSBs) of the occupational standard.
	The apprentice must complete training towards English and maths qualifications in line with the apprenticeship funding rules.
	The apprentice must compile a Portfolio of Evidence.
End-point assessment gateway	The employer must be content that the apprentice is working at or above the occupational standard. The apprentice's employer must confirm that they think the apprentice:
	· is working at or above the occupational standard as a multi-channel marketer
	· has the evidence required to pass the gateway and is ready to take the EPA.
	The apprentice must have achieved English and maths qualifications in line with the apprenticeship funding rules.
	For the Project Report with Presentation and Questioning, the apprentice must submit the following supporting material: project scoping document requirements. To ensure the Project allows the apprentice to meet the KSBs mapped to this assessment method to the highest available grade, the EPAO should sign-off the Project's title and scope at the gateway to confirm it is suitable. A brief project summary must be submitted to the EPAO. It should be no more than 500 words. This needs to show that the Project will provide the opportunity for the apprentice to cover the KSBs mapped to this assessment method. It is not assessed.
	For the Interview underpinned by Portfolio of Evidence the apprentice must submit a Portfolio of Evidence.
	The apprentice must submit any policies and procedures as requested by the EPAO.

End-point assessment – typically 5 months	**Grades available for each assessment method:** Project Report with Presentation and Questioning · fail · pass · distinction Interview underpinned by Portfolio of Evidence · fail · pass · distinction **Overall EPA and apprenticeship can be graded:** · fail · pass · merit · distinction
Professional recognition	This apprenticeship aligns with Chartered Institute of Marketing (CIM) for Affiliate. The apprenticeship will either wholly or partially satisfy the requirements for registration at this level. This apprenticeship aligns with Digital Marketing Institute (DMI) for Power. The apprenticeship will either wholly or partially satisfy the requirements for registration at this level. This apprenticeship aligns with Data and Marketing Association (DMA) for Individual. The apprenticeship will either wholly or partially satisfy the requirements for registration at this level.

Duration of end-point assessment period

The EPA is taken in the EPA period. The EPA period starts when the EPAO confirms the gateway requirements have been met and is typically 5 months.

The expectation is that the EPAO will confirm the gateway requirements have been met and the EPA starts as quickly as possible.

EPA gateway

The apprentice's employer must confirm that they think their apprentice is working at or above the occupational standard. The apprentice will then enter the gateway. The employer may take advice from the apprentice's training provider(s), but the employer must make the decision.

The apprentice must meet the gateway requirements before starting their EPA. These are:

- achieved English and maths qualifications in line with the apprenticeship funding rules
- for the Project Report with Presentation and Questioning the apprentice must submit project scoping document.

The apprentice must agree the subject, title and scope for their Project with their employer and EPAO by submitting a scoping document which will be no more than 500 words. This will not be assessed by the independent assessor.

- For the Interview underpinned by Portfolio of Evidence the apprentice must submit Portfolio of Evidence.

Portfolio of Evidence requirements

The apprentice must compile a Portfolio of Evidence during the on-programme period of the apprenticeship. It should only contain evidence related to the KSBs that will be assessed by this assessment method. It will typically contain 12 discrete pieces of evidence. Evidence must be mapped against the KSBs. Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is suggested.

Evidence sources may include:

- workplace documentation and records, for example:
- workplace policies and procedures
- witness statements
- annotated photographs
- video clips (maximum total duration 5 minutes); the apprentice must be in view and identifiable.

This is not a definitive list; other evidence sources can be included.

The Portfolio of Evidence should not include reflective accounts or any methods of self-assessment. Any employer contributions should focus on direct observation of performance (for example, witness statements) rather than opinions. The evidence provided should be valid and attributable to the apprentice; the Portfolio of Evidence should contain a statement from the employer and apprentice confirming this.

The EPAO should not assess the Portfolio of Evidence directly as it underpins the Interview. The independent assessor should review the Portfolio of Evidence to prepare questions for the Interview. They are not required to provide feedback after this review.

The apprentice must submit any policies and procedures as requested by the EPAO.

Order of assessment methods

The assessment methods can be delivered in any order.

The result of one assessment method does not need to be known before starting the next.

Project Report with Presentation and Questioning

Overview

A project involves the apprentice completing a significant and defined piece of work that has a real business application and benefit. The project must meet the needs of the employer's business and be relevant to the apprentice's occupation and apprenticeship. The research and written project report must start after the apprentice has gone through the gateway.

This assessment method has two components:

- project with a project output

- presentation with questions and answers.

Together, these components give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method. They are assessed by an independent assessor.

Rationale

This assessment method is being used because:

- The written Project Report is the most valid method as it allows the demonstration of professional competence. The written Project Report will contribute to the employer's business and be part of the apprentices' everyday work, ensuring that they can demonstrate KSBs in practice. Producing a written report reflects normal practice in the workplace for Multi-channel marketer, so this assessment method is appropriate.

- It is a significant and complex piece of work that thoroughly tests both higher and lower order knowledge and skills.

- Note that it is essential that the written Project Report articulates the apprentice's own work practice rather than the activities performed by the team of which they were part.

Delivery

The apprentice must complete a project that aligns with the criteria for this assessment method. Examples of the types of projects an apprentice could submit include:

- Undertake research into new tools that could be used for gathering audience insights. Use the tool to gather data and make recommendations for a future marketing campaign.

- Research and identify emerging trends and technologies and outline how these can be used to impact marketing activities. Recommend changes that could be implemented by the organisation.

- Analyse and evaluate a marketing campaign. Identify any strengths or weaknesses or continuing themes and develop a plan to improve future campaigns.

To ensure the project allows the apprentice to meet the KSBs mapped to this assessment method to the highest available grade, the EPAO must sign off the project's title and scope at the gateway to confirm it is suitable. The EPAO must refer to the grading descriptors to ensure that projects are pitched appropriately.

The project output must be in the form of a report and presentation.

The research and written Project Report must start after the apprentice has gone through the gateway. The employer should ensure the apprentice has the time and resources, within the project period, to plan and complete their project.

The apprentice may work as part of a team to complete the project, which could include internal colleagues or technical experts. The apprentice must however, complete their Project Report and presentation unaided and they must be reflective of their own role and contribution. The apprentice and their employer must con rm this when the report and any presentation materials are submitted.

Component 1: Project Report

The report must include at least:

- an executive summary (or abstract)
- an introduction
- the scope of the project (including key performance indicators)
- objectives
- research and methodology
- approach taken and risks to consider
- financial budgeting and resources
- discussion of findings
- outcomes and impact of the project implemented
- measure of success
- recommendations and conclusions
- appendix containing mapping of KSBs to the report.

The Project Report must have a word count of 2500 words. A tolerance of 10% above or below is allowed at the apprentice's discretion. Appendices, references and diagrams are not included in this total. The apprentice must produce and include a mapping in an appendix, showing how the report evidences the KSBs mapped to this assessment method.

The apprentice must complete and submit the report and any presentation materials to the EPAO by the end of week 12 of the EPA period.

Component 2: Presentation with questions

The presentation with questions must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

The apprentice must prepare and deliver a presentation to an independent assessor. After the presentation, the independent assessor must ask the apprentice questions about their Project Report and presentation.

The presentation should cover:

- an overview of the project
- the project scope (including key performance indicators)
- summary of actions undertaken by the apprentice
- project outcomes and how these were achieved.

The presentation with questions must last 45 minutes. This will typically include a presentation of 20 minutes and questioning lasting 25 minutes. The independent assessor must use the full time available for questioning. The independent assessor can increase the time of the presentation and questioning by up to 10%. This time is to allow the apprentice to complete their last point or respond to a question if necessary.

The independent assessor must ask at least 6 questions. They must use the questions from the EPAO's question bank or create their own questions in line with the EPAO's training. Follow up questions are allowed where clarification is required.

The purpose of the independent assessor's questions is:

- to verify that the activity was completed by the apprentice

- to seek clarification where required

- to assess those KSBs that the apprentice did not have the opportunity to demonstrate with the report, although these should be kept to a minimum

- to assess level of competence against the grading descriptors.

The apprentice must submit any presentation materials to the EPAO at the same time as the report - by the end of week 12 of the EPA period. The apprentice must notify the EPAO, at that point, of any technical requirements for the presentation.

During the presentation, the apprentice must have access to:

- audio-visual presentation equipment

- flip chart and writing and drawing materials

- computer

- any other requirements as previously notified to the EPAO.

The independent assessor must have at least two weeks to review the Project Report and any presentation materials, to allow them to prepare questions.

The apprentice must be given at least two weeks' notice of the presentation with questions.

Assessment decision

The independent assessor must make the grading decision. They must assess the project components holistically when deciding the grade.

The independent assessor must keep accurate records of the assessment. They must record:

- the KSBs demonstrated in the report and presentation with questions

- the apprentice's answers to questions

- the grade achieved.

Assessment location

The presentation with questions must take place in a suitable venue selected by the EPAO for example, the EPAO's or employer's premises. It should take place in a quiet room, free from distractions and influence.

The presentation with questions can be conducted by video conferencing. The EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

Question and resource development

The EPAO must develop a purpose-built assessment specification and question bank. It is recommended this is done in consultation with employers of this occupation. The EPAO must maintain the security and confidentiality of EPA materials when consulting with employers.

The assessment specification and question bank must be reviewed at least once a year to ensure they remain fit-for-purpose.

The assessment specification must be relevant to the occupation and demonstrate how to assess the KSBs mapped to this assessment method. The EPAO must ensure that questions are refined and developed to a high standard. The questions must be unpredictable. A question bank of sufficient size will support this.

The EPAO must ensure that the apprentice has a different set of questions in the case of re-sits or re-takes.

EPAO must produce the following materials to support the project:

- independent assessor EPA materials which include:
  - o training materials
  - o administration materials
  - o moderation and standardisation materials
  - o guidance materials
  - o grading guidance
  - o question bank
- EPA guidance for the apprentice and the employer.

The EPAO must ensure that the EPA materials are subject to quality assurance procedures including standardisation and moderation.

Interview underpinned by Portfolio of Evidence

Overview

In the Interview, an independent assessor asks the apprentice questions. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

The apprentice can refer to and illustrate their answers with evidence from their Portfolio of Evidence.

Rationale

This assessment method is being used because:

- it allows the apprentice to be assessed against KSBs that may not naturally occur as part of a work-based project
- it allows the apprentice to show case their depth of understanding relating to the KSBs
- it allows the independent assessor to consider the context and sector that the apprentice operates within, giving flexibility to ensure that all the KSBs can be assessed appropriately
- it is cost effective, and it allows consideration of the potential need to conduct the EPA remotely.

Delivery

The Interview must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

An independent assessor must conduct and assess the Interview.

The purpose of the independent assessor's questions will be enable the apprentice to demonstrate competence in the knowledge, skills and behaviours mapped to this assessment method.

The EPAO must give an apprentice one week's notice of the Interview.

The independent assessor must have at least two weeks to review the supporting documentation.

The apprentice must have access to their Portfolio of Evidence during the Interview.

The apprentice can refer to and illustrate their answers with evidence from their Portfolio of Evidence however, the Portfolio of Evidence is not directly assessed.

The Interview must last for 60 minutes. The independent assessor can increase the time of the Interview by up to 10%. This time is to allow the apprentice to respond to a question if necessary.

The independent assessor must ask at least six questions. The independent assessor must use the questions from the EPAO's question bank or create their own questions in line with the EPAO's training. Follow-up questions are allowed where clarification is required.

The independent assessor must make the grading decision.

The independent assessor must keep accurate records of the assessment. They must record:

- the apprentice's answers to questions

- the KSBs demonstrated in answers to questions

- the grade achieved.

Assessment location

The Interview must take place in a suitable venue selected by the EPAO for example, the EPAO's or employer's premises.

The Interview can be conducted by video conferencing. The EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

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

Question and resource development

The EPAO must develop a purpose-built assessment specification and question bank. It is recommended this is done in consultation with employers of this occupation. The EPAO must maintain the security and confidentiality of EPA materials when consulting with employers. The assessment specification and question bank must be reviewed at least once a year to ensure they remain fit-for-purpose.

The assessment specification must be relevant to the occupation and demonstrate how to assess the KSBs mapped to this assessment method. The EPAO must ensure that questions are refined and developed to a high standard. The questions must be unpredictable. A question bank of sufficient size will support this.

The EPAO must ensure that the apprentice has a different set of questions in the case of re-sits or re-takes. The EPAO must produce the following materials to support the Interview underpinned by Portfolio of Evidence:

- independent assessor assessment materials which include:

  o training materials

  o administration materials

  o moderation and standardisation materials

  o guidance materials

  o grading guidance

  o question bank

- EPA guidance for the apprentice and the employer.

The EPAO must ensure that the EPA materials are subject to quality assurance procedures including standardisation and moderation.

Grading

Project Report with Presentation and Questioning

Fail - does not meet pass criteria

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
Marketing methods, principles, and practices K6 K17 S2	Selects appropriate metrics for the delivery and evaluation of marketing activity applying them accurately to elicit valid data (K17). Uses valid data and resources to plan and demonstrate how marketing activities effectively retain and acquire customer segments (K6, S2).	Justifies their plan for the choice of marketing activities and resources used to retain and or acquire customer segments (K17, S2).
Business and organisation K2 K3	Explains the role that they play in the organisation's structure, vision and objectives and the impact it has on the wider environment and sustainability on marketing activities (K2, K3).	Evaluates the benefits and limitations of the proposed project recommendations to their organisation (K2).
Communication and copywriting K14 S5 S7 B4	Explains how they work collaboratively and adapt their communication style for stakeholders and internal audiences (K14, B4). Demonstrates copywriting techniques to write communications that are in line with organisational brand guidelines ensuring that it is proofread for accuracy (S5, S7).	Justifies the communication methods used to present their findings and why others were not suitable (K14). Evaluates the suitability of different copywriting techniques for different marketing communications, making valid and evidence based recommendation (S5).

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
Campaign management K11 K18 K19 K20 S1 S3 S16 S17 B1 B2	Explains clearly how campaign management process and tools used or proposed are appropriate, valid, and taking responsibility to enable effective reviews to take place leading to improvements in results with internal stakeholders engaged in the process (K11, K18, K19, K20, B2). Measures and evaluates campaign delivery, accurately interpreting data to draw valid and accurate conclusions and ownership of the workload (S1, S3, S16, S17, B1).	Evaluates the strengths and weaknesses of different approaches used for campaign management and how the data that comes from the campaign management process can be used to informs the recommendations (K18, K19, S3, S16).
IT and digital S4 S12 S13 S14	Applies advanced techniques to the use of software packages to contribute to campaign management and achieving marketing objectives (S4, S12, S13, S14).	N/A

Interview underpinned by Portfolio of Evidence

Fail – does not meet pass criteria

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
Marketing methods, principles, and practices K1 K4 K15	Explains how they have effectively applied relevant marketing theories, concepts, and principles to inform their decision making, drawing upon evidence to support their reasoning (K1, K4, K15).	N/A
Regulation and legislation K9	Explains the regulatory and legislative requirements for handling and processing of data in their marketing role (K9).	N/A
Marketing communications K10 B5	Describes the principles of conducting marketing communications and why it is important that this is undertaken in an ethical and diverse manner (K10). Explains how they identify and seek out opportunities for professional development (B5).	N/A
Customer experience and the customer journey K13 K21 K22 B6	Outlines how they brief and manage external suppliers in a professional manner with integrity and confidentiality (K13, B6). Describes the customer journey including offline and digital touchpoints, customer personas, sales funnels and how they segment audiences for targeting and the impact that marketing has on customer service or experience (K21, K22).	Analyses the impact of customer targeting and make evidence based recommendations on how to improve the customer journey (K21, K22).

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
Research and campaign planning K5 S9	Outlines the importance of competitor analysis and how this would be undertaken and contribute to the research of external suppliers to support recommendations (K5). Contributes to research of external suppliers and make recommendations for the procurement of marketing goods and services (S9).	N/A
IT and digital tools K7 K23 S8 S10	Discusses how to create content and how this would be adapted for different online and offline mediums using software to produce assets, organising offline and digital assets to ensure they are coordinated and legally compliant (K7, K23, S8, S10).	N/A
Campaign implementation and management K12 K16 S6 S11 S15 B3	Summarises the common marketing channels and cross channel behaviour to use in order to build and implement campaigns using offline and online media platforms working flexibly and adapting to circumstances (K12, S6, B3). Shows how a content management system is used to publish text, images and video/animated content (S11). Describes how to measure return on investment (ROI) and demonstrate how campaigns are monitored and amended to meet budget requirements (K16, S15).	Evaluates the suitability of different marketing channels for building and implementing campaigns, making valid and evidence based recommendations for change (K12, S6).

| THEME KSBS 2 | PASS

APPRENTICES MUST DEMONSTRATE ALL THE PASS DESCRIPTORS | DISTINCTION

APPRENTICES MUST DEMONSTRATE ALL THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS |
|---|---|---|
| Data analysis and marketing evaluation K8 S18 | Identifies current and emerging technologies and software and how these are used to record and analyse customer data and the impact on marketing campaigns (K8, S18). | Justifies the technology and software used to analyse their findings and why others were not suitable (K8, S18). |

Overall EPA grading

Performance in the EPA determines the apprenticeship grade of:

- fail

- pass

- merit

- distinction.

An independent assessor must individually grade the: Project Report with Presentation and Questioning and Interview underpinned by Portfolio of Evidence in line with this EPA plan.

The EPAO must combine the individual assessment method grades to determine the overall EPA grade.

If the apprentice fails one or more assessment methods, they will be awarded an overall fail.

To achieve an overall pass, the apprentice must achieve at least a pass in all the assessment methods. Apprentices who fail one or more assessment method will be awarded an overall EPA fail. Apprentices must achieve at least a 'pass' in all the EPA methods to get an overall 'pass'. To achieve an overall EPA 'merit,' the apprentice must achieve a pass in the Project Report with Presentation and Questioning or the Interview underpinned by Portfolio of Evidence and a distinction in the other assessment method. To achieve an overall EPA 'distinction,' the apprentice must achieve a distinction in both assessment methods

Grades from individual assessment methods must be combined in the following way to determine the grade of the EPA overall.

PROJECT REPORT WITH PRESENTATION AND QUESTIONING	INTERVIEW UNDERPINNED BY PORTFOLIO OF EVIDENCE	OVERALL GRADING
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Merit
Distinction	Pass	Merit
Distinction	Distinction	Distinction

Re-sits and re-takes

An apprentice who fails one or more assessment method(s) can take a re-sit or a re-take at their employer's discretion. The apprentice's employer needs to agree that a re-sit or re-take is appropriate. A re-sit does not need further learning, whereas a re-take does.

An apprentice should have a supportive action plan to prepare for a re-sit or a re-take.

The employer and EPAO agree the timescale for a re-sit or re-take. A re-sit is typically taken within two months of the EPA outcome notification. The timescale for a re-take is dependent on how much re-training is required and is typically taken within three months of the EPA outcome notification.

Failed assessment methods must be re-sat or re-taken within a six-month period from the EPA outcome notification, otherwise the entire EPA will need to be re-sat or re-taken in full.

Re-sits and re-takes are not offered to an apprentice wishing to move from pass to a higher grade.

If the apprentice fails the project assessment method, they will be required to amend the project output in line with the independent assessor's feedback. The apprentice will be given four weeks to rework and submit the amended report.

An apprentice will get a maximum EPA grade of pass for a re-sit or re-take, unless the EPAO determines there are exceptional circumstances.

Roles and responsibilities

ROLES	RESPONSIBILITIES
Apprentice	As a minimum, the apprentice should: · participate in and complete on-programme training to meet the KSBs as outlined in the occupational standard for a minimum of 12 months · complete the required amount of off -the-job training specified by the apprenticeship funding rules and as arranged by the employer and training provider · understand the purpose and importance of EPA · meet the gateway requirements · undertake the EPA
Employer	As a minimum, the apprentice's employer must: · select the EPAO and training provider · work with the training provider (where applicable) to support the apprentice in the workplace and to provide the opportunities for the apprentice to develop the KSBs · arrange and support o -the-job training to be undertaken by the apprentice · decide when the apprentice is working at or above the occupational standard and is ready for EPA · ensure that supporting evidence required at the gateway is submitted in line with this EPA plan · liaise with the training provider and EPAO to ensure the EPA is booked in a timely manner Post-gateway, the employer must: · confirm arrangements with the EPAO for the EPA (who, when, where) in a timely manner (including providing access to any employer-specific documentation as required, for example company policies) · ensure that the EPA is scheduled with the EPAO for a date and time which allows the opportunity for the apprentice to be assessed against the KSBs · remain independent from the delivery of the EPA

ROLES	RESPONSIBILITIES
	· ensure the apprentice is given sufficient time away from regular duties to prepare for, and complete all post- gateway elements of the EPA, and that any required supervision during this time (as stated within this EPA plan) is in place · where the apprentice is assessed in the workplace, ensure that the apprentice has access to the resources used on a regular basis · pass the certificate to the apprentice upon receipt from the EPAO
EPAO	As a minimum, the EPAO must: · conform to the requirements of this EPA plan and deliver its requirements in a timely manner · conform to the requirements of the register of end-point assessment organisations (RoEPAO) · conform to the requirements of the external quality assurance provider (EQAP) for this apprenticeship · understand the occupational standard · make the EPA contractual arrangements, including agreeing the price of the EPA · develop and produce assessment materials as detailed for each assessment method in this EPA plan · appoint qualified and competent independent assessors in line with the requirements of this EPA plan to conduct assessments and oversee their working · appoint administrators (and invigilators where required) to administer the EPA · provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading · provide information, advice, guidance and documentation to enable apprentices, employers and training providers to prepare for the EPA · confirm all gateway requirements have been met as quickly as possible · arrange for the EPA to take place, in consultation with the employer · ensure that the apprentice has access to the required resources and liaise with the employer to agree this if necessary, where the apprentice is not assessed in the workplace

ROLES	RESPONSIBILITIES
	- develop and provide assessment recording documentation to ensure a clear and auditable process is in place for providing assessment decisions and feedback to stakeholders
	- have no direct connection with the apprentice, their employer or training provider in all instances; there must be no conflict of interest
	- have policies and procedures for internal quality assurance (IQA), and maintain records of IQA activity and moderation for external quality assurance (EQA) purposes
	- deliver induction training for independent assessors, and for invigilators and markers (where used)
	- undertake standardisation activity on this apprenticeship for an independent assessor before they conduct an EPA for the first time, if the EPA is updated and periodically (a minimum of annually)
	- manage invigilation of the apprentice to maintain security of the assessment in line with the EPAO's malpractice policy
	- verify the identity of the apprentice
	- use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard
Independent assessor	As a minimum, an independent assessor must:
	- have the competence to assess the apprentice at the level of this apprenticeship and hold any required qualifications and experience in line with the requirements of the independent assessor as detailed in the IQA section of this EPA plan
	- understand the occupational standard and the requirements of this EPA
	- have, maintain and be able to evidence, up-to-date knowledge and expertise of the occupation
	- deliver the end-point assessment in-line with this EPA plan
	- comply with the IQA requirements of the EPAO
	- have no direct connection or conflict of interest with the apprentice, their employer or training provider; in all instances; there must be no conflict of interest
	- attend induction training

ROLES	RESPONSIBILITIES
	• attend standardisation events when they start working for the EPAO, before they conduct an EPA for the first time and a minimum of annually for this apprenticeship
	• assess each assessment method, as determined by the EPA plan
	• assess the KSBs assigned to each assessment method, as shown in the mapping of KSBs to assessment methods in this EPA plan
	• make the grading decisions
	• record and report assessment outcome decisions, for each apprentice, following instructions and using assessment recording documentation provided by the EPAO, in a timely manner
	• use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard
	• mark open (constructed) test answers accurately according to the EPAO's mark scheme and procedures
Training provider	As a minimum, the training provider must:
	• work with the employer and support the apprentice during the off-the-job training to provide the opportunities to develop the KSBs as listed in the occupational standard
	• conduct training covering the KSBs agreed as part of the Commitment Statement or the Individual Learning Plan
	• monitor the apprentice's progress during any training provider led on-programme learning
	• advise the employer, upon request, on the apprentice's readiness for EPA
	• remain independent from the delivery of the EPA

Reasonable adjustments

The EPAO must have reasonable adjustments arrangements for the EPA. This should include:

- how an apprentice qualifies for reasonable adjustment
- what reasonable adjustments may be made.

Adjustments must maintain the validity, reliability and integrity of the EPA as outlined in this EPA plan.

Internal quality assurance

Internal quality assurance refers to how the EPAO ensures valid, consistent and reliable EPA decisions. The EPAO must adhere to the requirements within the roles and responsibilities section and:

- have effective and rigorous quality assurance systems and procedures that ensure fair, reliable and consistent EPA regardless of employer, place, time or independent assessor
- appoint independent assessors who are competent to deliver the EPA and who:
  - o have recent relevant experience of the occupation or sector to at least occupational level 4 gained in the last 3 years or significant experience of the occupation or sector
- operate induction training for anyone involved in the delivery or assessment of the EPA
- provide training for independent assessors in good assessment practice, operating the assessment tools and making grading decisions
- provide ongoing training for markers and invigilators
- provide standardisation activity for this apprenticeship standard for all independent assessors:
  - o before they conduct an EPA for the first time
  - o if the EPA is updated
  - o periodically as appropriate (a minimum of annually)
- conduct effective moderation of EPA decisions and grades
- conduct appeals where required, according to the EPAO's appeals procedure, reviewing and making final decisions on EPA decisions and grades
- have no direct connection with the apprentice, their employer or training provider; in HEI.

Value for money

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

- utilising digital remote platforms to conduct applicable assessment methods

- using the employer's premises

- conducting assessment methods on the same day.

Professional recognition

This apprenticeship aligns with:

- Chartered Institute of Marketing (CIM) for Affiliate Digital Marketing Institute (DMI) for Power

- Data and Marketing Association (DMA) for Individual.

KSB mapping table

KNOWLEDGE	ASSESSMENT METHODS
K1 Marketing theory, concepts and basic principles such as what marketing is, the marketing mix the promotional mix and the differences between each channel used.	Interview underpinned by Portfolio of Evidence
K2 The business' structure, vision, priorities, and objectives, and how their marketing role supports these.	Project Report with Presentation and Questioning
K3 Business tools used to measure the impact of business objectives, the wider environment and sustainability on marketing activities.	Project Report with Presentation and Questioning
K4 What a marketing plan is, how it is built and its purpose.	Interview underpinned by Portfolio of Evidence
K5 The importance of competitor analysis and how to undertake it.	Interview underpinned by Portfolio of Evidence
K6 Brand theory such as positioning, value, identity, guidelines, and tone of voice.	Project Report with Presentation and Questioning
K7 Create content using principles of design and copywriting, and how to adapt for online and offline mediums e.g. writing digital content for the web compared to leaflets.	Interview underpinned by Portfolio of Evidence
K8 Current and emerging technologies, software and systems which impact on marketing.	Interview underpinned by Portfolio of Evidence
K9 Relevant regulatory and legislative requirements such as data protection, GDPR, cyber security, trading laws, and copyright law for the handling and processing of data and its application.	Interview underpinned by Portfolio of Evidence

KNOWLEDGE	ASSESSMENT METHODS
K10 Principles of conducting marketing communications in an ethical and diverse manner.	Interview underpinned by Portfolio of Evidence
K11 How internal stakeholders work to support the delivery of all marketing campaigns.	Project Report with Presentation and Questioning
K12 Common marketing channels, cross channel behaviour, and how to manage and operate an integrated campaign using online and offline channels.	Interview underpinned by Portfolio of Evidence
K13 How to brief and manage external marketing suppliers.	Interview underpinned by Portfolio of Evidence
K14 Adapt communications for appropriate stakeholders and internal audiences.	Project Report with Presentation and Questioning
K15 The principles of content marketing, and content creation.	Interview underpinned by Portfolio of Evidence
K16 Budget management and how to measure return on investment (ROI).	Interview underpinned by Portfolio of Evidence
K17 The metrics for the delivery and evaluation of marketing activity	Project Report with Presentation and Questioning
K18 The importance of reviewing campaigns regularly to ensure effectiveness and optimisation.	Project Report with Presentation and Questioning
K19 The campaign management process including research, planning, budgeting, implementation, and delivery.	Project Report with Presentation and Questioning

KNOWLEDGE	ASSESSMENT METHODS
K20 Tools used to support campaign management such as social media, Gantt charts, data analytics, and project management software.	Project Report with Presentation and Questioning
K21 The customer journey including customer offline and digital touchpoints, customer personas, how to engage customers at different stages of their journey, sales funnels and how to segment an audience for targeting.	Interview underpinned by Portfolio of Evidence
K22 The impact marketing has on the level of customer service or the customer experience, including community management channels.	Interview underpinned by Portfolio of Evidence
K23 Quality management and the maintenance of online and offline assets.	Interview underpinned by Portfolio of Evidence

SKILL	ASSESSMENT METHODS
S1 Develop or interpret briefs for external or internal stakeholders and measure delivery in-line with the specification and agreed timelines.	Project Report with Presentation and Questioning
S2 Plan and coordinate a marketing activity using marketing tactics to acquire and retain one or more customer segments using available resources.	Project Report with Presentation and Questioning
S3 Contribute to the generation of innovative and creative approaches across video, images, and other formats, both online and offline, to support campaign development.	Project Report with Presentation and Questioning
S4 Use research/survey software to gather audience insight and/or evaluation to support the project.	Project Report with Presentation and Questioning

SKILL	ASSESSMENT METHODS
S5 Use copywriting techniques to write persuasive text/copy to meet a communications objective ensuring it is in-line with organisational brand guidelines.	Project Report with Presentation and Questioning
S6 Build and implement multi-channel campaigns across a variety of platforms, either offline or digital media.	Interview underpinned by Portfolio of Evidence
S7 Proofread marketing copy ensuring it is accurate, persuasive and is on brand.	Project Report with Presentation and Questioning
S8 Use software to design and create marketing assets to meet the technical specification.	Interview underpinned by Portfolio of Evidence
S9 Contribute to the research of external suppliers to support recommendations and procurement of marketing goods and services.	Interview underpinned by Portfolio of Evidence
S10 Organise offline and digital assets ensuring they are coordinated and legally compliant.	Interview underpinned by Portfolio of Evidence
S11 Use a website content management system to publish text, images, and video/animated content.	Interview underpinned by Portfolio of Evidence
S12 Create and maintain spreadsheets to support marketing activities such as project/budget planning and organisation of marketing assets.	Project Report with Presentation and Questioning
S13 Use technology and software packages to support day to day activities, e.g. stakeholder communications, development of briefs, data analysis, report writing, presentations and project management.	Project Report with Presentation and Questioning

SKILL	ASSESSMENT METHODS
S14 Identify and use data and technologies to achieve marketing objectives.	Project Report with Presentation and Questioning
S15 Monitor and amend campaigns to meet budget requirements including time and monetary costs.	Interview underpinned by Portfolio of Evidence
S16 Review campaigns regularly to ensure effectiveness, to optimise the results.	Project Report with Presentation and Questioning
S17 Measure and evaluate campaign delivery to identify areas for improvement.	Project Report with Presentation and Questioning
S18 Use data analysis tools to record, interpret and analyse customer or campaign data.	Interview underpinned by Portfolio of Evidence

BEHAVIOUR	ASSESSMENT METHODS
B1 Has accountability and ownership of their tasks and workload.	Project Report with Presentation and Questioning
B2 Takes responsibility, shows initiative and is organised.	Project Report with Presentation and Questioning
B3 Works flexibly and adapts to circumstances.	Interview underpinned by Portfolio of Evidence
B4 Works collaboratively with others across the organisation and external stakeholders.	Project Report with Presentation and Questioning

BEHAVIOUR	ASSESSMENT METHODS
B5 Seeks learning opportunities and continuous professional development.	Interview underpinned by Portfolio of Evidence
B6 Acts in a professional manner with integrity and confidentiality.	Interview underpinned by Portfolio of Evidence

Mapping of KSBs to grade themes

Project Report with Presentation and Questioning

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
Marketing methods, principles, and practices K6 K17 S2	Brand theory such as positioning, value, identity, guidelines, and tone of voice. (K6) The metrics for the delivery and evaluation of marketing activity. (K17)	Plan and coordinate a marketing activity using marketing tactics to acquire and retain one or more customer segments using available resources. (S2)	None
Business and organisation K2 K3	The business' structure, vision, priorities, and objectives, and how their marketing role supports these. (K2) Business tools used to measure the impact of business objectives, the wider environment and sustainability on marketing activities. (K3)	None	None
Communication and copywriting K14 S5 S7 B4	Adapt communications for appropriate stakeholders and internal audiences. (K14)	Use copywriting techniques to write persuasive text/ copy to meet a communications objective ensuring it is in-line with organisational brand guidelines. (S5) Proofread marketing copy ensuring it is accurate, persuasive and is on brand. (S7)	Works collaboratively with others across the organisation and external stakeholders. (B4)

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
Campaign management K11 K18 K19 K20 S1 S3 S16 S17 B1 B2	How internal stakeholders work to support the delivery of all marketing campaigns. (K11) The importance of reviewing campaigns regularly to ensure effectiveness and optimisation. (K18) The campaign management process including research, planning, budgeting, implementation, and delivery. (K19) Tools used to support campaign management such as social media, Gantt charts, data analytics, and project management software. (K20)	Develop or interpret briefs for external or internal stakeholders and measure delivery in-line with the specification and agreed timelines. (S1) Contribute to the generation of innovative and creative approaches across video, images, and other formats, both online and offline, to support campaign development. (S3) Review campaigns regularly to ensure effectiveness, to optimise the results. (S16) Measure and evaluate campaign delivery to identify areas for improvement. (S17)	Has accountability and ownership of their tasks and workload. (B1) Takes responsibility, shows initiative and is organised. (B2)
IT and digital S4 S12 S13 S14	None	Use research/survey software to gather audience insight and/or evaluation to support the project. (S4) Create and maintain spreadsheets to support marketing activities such as project/budget planning and organisation of marketing assets. (S12)	None

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
		Use technology and software packages to support day to day activities, e.g. stakeholder communications, development of briefs, data analysis, report writing, presentations and project management. (S13) Identify and use data and technologies to achieve marketing objectives. (S14)	

Interview underpinned by Portfolio of Evidence

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
Marketing methods, principles, and practices K1 K4 K15	Marketing theory, concepts and basic principles such as what marketing is, the marketing mix the promotional mix and the differences between each channel used. (K1) What a marketing plan is, how it is built and its purpose. (K4) The principles of content marketing, and content creation. (K15)	None	None
Regulation and legislation K9	Relevant regulatory and legislative requirements such as data protection, GDPR, cyber security, trading laws, and copyright law for the handling and processing of data and its application. (K9)	None	None
Marketing communications K10 B5	Principles of conducting marketing communications in an ethical and diverse manner. (K10)	None	Seeks learning opportunities and continuous professional development. (B5)

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
Customer experience and the customer journey K13 K21 K22 B6	How to brief and manage external marketing suppliers. (K13) The customer journey including customer offline and digital touchpoints, customer personas, how to engage customers at different stages of their journey, sales funnels and how to segment an audience for targeting. (K21) The impact marketing has on the level of customer service or the customer experience, including community management channels. (K22)	None	Acts in a professional manner with integrity and confidentiality. (B6)
Research and campaign planning K5 S9	The importance of competitor analysis and how to undertake it. (K5)	Contribute to the research of external suppliers to support recommendations and procurement of marketing goods and services. (S9)	None

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
IT and digital tools K7 K23 S8 S10	Create content using principles of design and copywriting, and how to adapt for online and offline mediums e.g. writing digital content for the web compared to leaflets. (K7) Quality management and the maintenance of online and offline assets. (K23)	Use software to design and create marketing assets to meet the technical specification. (S8) Organise offline and digital assets ensuring they are coordinated and legally compliant. (S10)	None
Campaign implementation and management K12 K16 S6 S11 S15 B3	Common marketing channels, cross channel behaviour, and how to manage and operate an integrated campaign using online and offline channels. (K12) Budget management and how to measure return on investment (ROI). (K16)	Build and implement multi- channel campaigns across a variety of platforms, either offline or digital media. (S6) Use a website content management system to publish text, images, and video/animated content. (S11) Monitor and amend campaigns to meet budget requirements including time and monetary costs. (S15)	Works flexibly and adapts to circumstances. (B3)

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
Data analysis and marketing evaluation K8 S18	Current and emerging technologies, software and systems which impact on marketing. (K8)	Use data analysis tools to record, interpret and analyse customer or campaign data. (S18)	None

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