



**Institute for Apprenticeships  
& Technical Education**

# MULTI-CHANNEL MARKETER

## Key information

**Reference:** ST1031

**Version:** 1.0

**Level:** 3

**Typical duration to gateway:** 18 months

**Typical EPA period:** 5 months

**Maximum funding:** £11000

**Route:** Sales, marketing and procurement

**Date updated:** 12/12/2023

**Approved for delivery:** 11 December 2023

**Lars code:** 737

**EQA provider:** Ofqual

**Review:** This apprenticeship standard will be reviewed after three years

## End-point assessment plan

V1.0

### 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 off-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**

<p><b>On-programme - typically 18 months</b></p>	<p>The apprentice must complete training to develop the knowledge, skills and behaviours (KSBs) of the occupational standard.</p> <p>The apprentice must complete training towards English and maths qualifications in line with the apprenticeship funding rules.</p> <p>The apprentice must compile a portfolio of evidence.</p>
<p><b>End-point assessment gateway</b></p>	<p>The employer must be content that the apprentice is working at or above the occupational standard.</p> <p>The apprentice's employer must confirm that they think the apprentice:</p> <ul style="list-style-type: none"> <li>• is working at or above the occupational standard as a multi-channel marketer</li> <li>• has the evidence required to pass the gateway and is ready to take the EPA</li> </ul> <p>The apprentice must have achieved English and maths qualifications in line with the apprenticeship funding rules.</p> <p>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.</p> <p>For the interview underpinned by portfolio of evidence the apprentice must submit a portfolio of evidence.</p> <p>The apprentice must submit any policies and procedures as requested by the EPAO.</p>
<p><b>End-point assessment - typically 5 months</b></p>	<p><b>Grades available for each assessment method:</b></p> <p>Project report with presentation and questioning</p> <ul style="list-style-type: none"> <li>• fail</li> </ul>

	<ul style="list-style-type: none"> <li>• pass</li> <li>• distinction</li> </ul> <p>Interview underpinned by portfolio of evidence</p> <ul style="list-style-type: none"> <li>• fail</li> <li>• pass</li> <li>• distinction</li> </ul> <p><b>Overall EPA and apprenticeship can be graded:</b></p> <ul style="list-style-type: none"> <li>• fail</li> <li>• pass</li> <li>• merit</li> <li>• distinction</li> </ul>
<b>Professional recognition</b>	<p>This apprenticeship aligns with Chartered Institute of Marketing (CIM) for Affiliate</p> <p>The apprenticeship will either wholly or partially satisfy the requirements for registration at this level.</p> <p>This apprenticeship aligns with Digital Marketing Institute (DMI) for Power</p> <p>The apprenticeship will either wholly or partially satisfy the requirements for registration at this level.</p> <p>This apprenticeship aligns with Data and Marketing Association (DMA) for Individual</p> <p>The apprenticeship will either wholly or partially satisfy the requirements for registration at this level.</p>
<b>Re-sits and re-takes</b>	<ul style="list-style-type: none"> <li>• Re-take and re-sit grade cap: pass</li> <li>• Re-sit timeframe: typically 2 months</li> <li>• Re-take timeframe: typically 3 months</li> </ul>

## 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 2 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 based on any of the following:

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 on 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 confirm 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, aims and objectives)
- a project plan
- research outcomes
- data analysis outcomes
- project outcomes
- discussion of findings
- recommendations and conclusions
- references
- appendix containing mapping of KSBs to the report.

The report must also include:

- an introduction
- an executive summary
- the scope of the project (including key performance indicators)
- objectives
- research and methodology
- approach taken and risks to consider

- financial budgeting and resources
- outcomes and impact of the project implemented
- measure of success
- recommendations and conclusions

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 2 weeks to review the project report and any presentation materials, to allow them to prepare questions.

The apprentice must be given at least 2 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:
  - training materials
  - administration materials
  - moderation and standardisation materials
  - guidance materials
  - grading guidance
  - 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 1 weeks' notice of the interview.

The independent assessor must have at least 2 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 6 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:
  - training materials
  - administration materials
  - moderation and standardisation materials
  - guidance materials
  - grading guidance
  - 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 <a href="#">K6</a> <a href="#">K17</a> <a href="#">S2</a>	<p>Selects appropriate metrics for the delivery and evaluation of marketing activity applying them accurately to elicit valid data (K17).</p> <p>Uses valid data and resources to plan and demonstrate how marketing activities effectively retain and acquire customer segments (K6, S2).</p>	Justifies their plan for the choice of marketing activities and resources used to retain and or acquire customer segments (K17, S2).
Business and organisation <a href="#">K2</a> <a href="#">K3</a>	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 <a href="#">K14</a> <a href="#">S5</a> <a href="#">S7</a> <a href="#">B4</a>	<p>Explains how they work collaboratively and adapt their communication style for stakeholders and internal audiences (K14, B4).</p> <p>Demonstrates copywriting techniques to write communications that are in line with organisational brand guidelines ensuring that it is proofread for accuracy (S5, S7).</p>	<p>Justifies the communication methods used to present their findings and why others were not suitable (K14).</p> <p>Evaluates the suitability of different copywriting techniques for different marketing communications, making valid and evidence based recommendation (S5).</p>
Campaign management <a href="#">K11</a> <a href="#">K18</a> <a href="#">K19</a> <a href="#">K20</a> <a href="#">S1</a> <a href="#">S3</a> <a href="#">S16</a> <a href="#">S17</a> <a href="#">B1</a> <a href="#">B2</a>	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).	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 inform the recommendations (K18, K19, S3, S16).

	Measures and evaluates campaign delivery, accurately interpreting data to draw valid and accurate conclusions and ownership of the workload (S1, S3, S16, S17, B1).	
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 <a href="#">K1</a> <a href="#">K4</a> <a href="#">K15</a>	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 <a href="#">K9</a>	Explains the regulatory and legislative requirements for handling and processing of data in their marketing role (K9).	N/A
Marketing communications <a href="#">K10</a> <a href="#">B5</a>	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 <a href="#">K13</a> <a href="#">K21</a> <a href="#">K22</a> <a href="#">B6</a>	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).
Research and campaign	Outlines the importance of competitor analysis and how this would be undertaken and	N/A

<p>planning K5 S9</p>	<p>contribute to the research of external suppliers to support recommendations (K5).</p> <p>Contributes to research of external suppliers and make recommendations for the procurement of marketing goods and services (S9).</p>	
<p>IT and digital tools K7 K23 S8 S10</p>	<p>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 co-ordinated and legally compliant (K7, K23, S8, S10).</p>	<p>N/A</p>
<p>Campaign implementation and management K12 K16 S6 S11 S15 B3</p>	<p>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).</p> <p>Shows how a content management system is used to publish text, images and video/animated content (S11).</p> <p>Describes how to measure return on investment (ROI) and demonstrate how campaigns are monitored and amended to meet budget requirements (K16, S15).</p>	<p>Evaluates the suitability of different marketing channels for building and implementing campaigns, making valid and evidence based recommendations for change (K12, S6).</p>
<p>Data analysis and marketing evaluation K8 S18</p>	<p>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).</p>	<p>Justifies the technology and software used to analyse their findings and why others were not suitable (K8, S18).</p>

## 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 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 2 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 3 months of the EPA outcome notification.

Failed assessment methods must be re-sat or re-taken within a 6-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 4 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	<p>As a minimum, the apprentice should:</p> <ul style="list-style-type: none"> <li>• participate in and complete on-programme training to meet the KSBs as outlined in the occupational standard for a minimum of 12 months</li> <li>• complete the required amount of off-the-job training specified by the apprenticeship funding rules and as arranged by the employer and training provider</li> <li>• understand the purpose and importance of EPA</li> <li>• meet the gateway requirements</li> <li>• undertake the EPA</li> </ul>
Employer	<p>As a minimum, the apprentice's employer must:</p> <ul style="list-style-type: none"> <li>• select the EPAO and training provider</li> <li>• 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</li> <li>• arrange and support off-the-job training to be undertaken by the apprentice</li> <li>• decide when the apprentice is working at or above the occupational standard and is ready for EPA</li> <li>• ensure that supporting evidence required at the gateway is submitted in line with this EPA plan</li> <li>• liaise with the training provider and EPAO to ensure the EPA is booked in a timely manner</li> </ul> <p>Post-gateway, the employer must:</p> <ul style="list-style-type: none"> <li>• 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)</li> <li>• 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</li> <li>• remain independent from the delivery of the EPA</li> <li>• 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</li> </ul>

	<ul style="list-style-type: none"> <li>• where the apprentice is assessed in the workplace, ensure that the apprentice has access to the resources used on a regular basis</li> <li>• pass the certificate to the apprentice upon receipt from the EPAO</li> </ul>
EPAO	<p>As a minimum, the EPAO must:</p> <ul style="list-style-type: none"> <li>• conform to the requirements of this EPA plan and deliver its requirements in a timely manner</li> <li>• conform to the requirements of the register of end-point assessment organisations (RoEPAO)</li> <li>• conform to the requirements of the external quality assurance provider (EQAP) for this apprenticeship</li> <li>• understand the occupational standard</li> <li>• make the EPA contractual arrangements, including agreeing the price of the EPA</li> <li>• develop and produce assessment materials as detailed for each assessment method in this EPA plan</li> <li>• appoint qualified and competent independent assessors in line with the requirements of this EPA plan to conduct assessments and oversee their working</li> <li>• appoint administrators (and invigilators where required) to administer the EPA</li> <li>• provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading</li> <li>• provide information, advice, guidance and documentation to enable apprentices, employers and training providers to prepare for the EPA</li> <li>• confirm all gateway requirements have been met as quickly as possible</li> <li>• arrange for the EPA to take place, in consultation with the employer</li> <li>• 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</li> <li>• develop and provide assessment recording documentation to ensure a clear and auditable process is in place for providing assessment decisions and feedback to stakeholders</li> <li>• have no direct connection with the apprentice, their employer or training provider in all instances; there must be no conflict of</li> </ul>

	<p>interest</p> <ul style="list-style-type: none"> <li>• have policies and procedures for internal quality assurance (IQA), and maintain records of IQA activity and moderation for external quality assurance (EQA) purposes</li> <li>• deliver induction training for independent assessors, and for invigilators and markers (where used)</li> <li>• 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)</li> <li>• manage invigilation of the apprentice to maintain security of the assessment in line with the EPAO's malpractice policy</li> <li>• verify the identity of the apprentice</li> <li>• use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard</li> </ul>
Independent assessor	<p>As a minimum, an independent assessor must:</p> <ul style="list-style-type: none"> <li>• 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</li> <li>• understand the occupational standard and the requirements of this EPA</li> <li>• have, maintain and be able to evidence, up-to-date knowledge and expertise of the occupation</li> <li>• deliver the end-point assessment in-line with this EPA plan</li> <li>• comply with the IQA requirements of the EPAO</li> <li>• 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</li> <li>• attend induction training</li> <li>• 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</li> <li>• assess each assessment method, as determined by the EPA plan</li> <li>• assess the KSBs assigned to each assessment method, as shown in the mapping of KSBs to assessment methods in this EPA plan</li> <li>• make the grading decisions</li> </ul>

	<ul style="list-style-type: none"> <li>• record and report assessment outcome decisions, for each apprentice, following instructions and using assessment recording documentation provided by the EPAO, in a timely manner</li> <li>• use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard</li> <li>• mark open (constructed) test answers accurately according to the EPAO's mark scheme and procedures</li> </ul>
Training provider	<p>As a minimum, the training provider must:</p> <ul style="list-style-type: none"> <li>• 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</li> <li>• conduct training covering the KSBs agreed as part of the Commitment Statement or the Individual Learning Plan</li> <li>• monitor the apprentice's progress during any training provider led on-programme learning</li> <li>• advise the employer, upon request, on the apprentice's readiness for EPA</li> <li>• remain independent from the delivery of the EPA</li> </ul>

## 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:
  - 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:
  - before they conduct an EPA for the first time
  - if the EPA is updated
  - 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
<p><b>K1</b> Marketing theory, concepts and basic principles such as what marketing is, the marketing mix the promotional mix and the differences between each channel used.</p>	<p>Interview underpinned by portfolio of evidence</p>
<p><b>K2</b> The business' structure, vision, priorities, and objectives, and how their marketing role supports these.</p>	<p>Project report with presentation and questioning</p>
<p><b>K3</b> Business tools used to measure the impact of business objectives, the wider environment and sustainability on marketing activities.</p>	<p>Project report with presentation and questioning</p>
<p><b>K4</b> What a marketing plan is, how it is built and its purpose.</p>	<p>Interview underpinned by portfolio of evidence</p>
<p><b>K5</b> The importance of competitor analysis and how to undertake it.</p>	<p>Interview underpinned by portfolio of evidence</p>
<p><b>K6</b> Brand theory such as positioning, value, identity, guidelines, and tone of voice.</p>	<p>Project report with presentation and questioning</p>
<p><b>K7</b> 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.</p>	<p>Interview underpinned by portfolio of evidence</p>
<p><b>K8</b> Current and emerging technologies, software and systems which impact on marketing.</p>	<p>Interview underpinned by portfolio of evidence</p>
<p><b>K9</b> 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.</p>	<p>Interview underpinned by portfolio of evidence</p>
<p><b>K10</b> Principles of conducting marketing communications in an ethical and diverse manner.</p>	<p>Interview underpinned by portfolio of evidence</p>



<p><b>K11</b> How internal stakeholders work to support the delivery of all marketing campaigns.</p>	<p>Project report with presentation and questioning</p>
<p><b>K12</b> Common marketing channels, cross channel behaviour, and how to manage and operate an integrated campaign using online and offline channels.</p>	<p>Interview underpinned by portfolio of evidence</p>
<p><b>K13</b> How to brief and manage external marketing suppliers.</p>	<p>Interview underpinned by portfolio of evidence</p>
<p><b>K14</b> Adapt communications for appropriate stakeholders and internal audiences.</p>	<p>Project report with presentation and questioning</p>
<p><b>K15</b> The principles of content marketing, and content creation.</p>	<p>Interview underpinned by portfolio of evidence</p>
<p><b>K16</b> Budget management and how to measure return on investment (ROI).</p>	<p>Interview underpinned by portfolio of evidence</p>
<p><b>K17</b> The metrics for the delivery and evaluation of marketing activity</p>	<p>Project report with presentation and questioning</p>
<p><b>K18</b> The importance of reviewing campaigns regularly to ensure effectiveness and optimisation.</p>	<p>Project report with presentation and questioning</p>
<p><b>K19</b> The campaign management process including research, planning, budgeting, implementation, and delivery.</p>	<p>Project report with presentation and questioning</p>
<p><b>K20</b> Tools used to support campaign management such as social media, Gantt charts, data analytics, and project management software.</p>	<p>Project report with presentation and questioning</p>

<b>K21</b> 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
<b>K22</b> The impact marketing has on the level of customer service or the customer experience, including community management channels	Interview underpinned by portfolio of evidence
<b>K23</b> Quality management and the maintenance of online and offline assets.	Interview underpinned by portfolio of evidence

SKILL	ASSESSMENT METHODS
<p><b>S1</b> Develop or interpret briefs for external or internal stakeholders and measure delivery in-line with the specification and agreed timelines</p>	Project report with presentation and questioning
<p><b>S2</b> Plan and coordinate a marketing activity using marketing tactics to acquire and retain one or more customer segments using available resources.</p>	Project report with presentation and questioning
<p><b>S3</b> Contribute to the generation of innovative and creative approaches across video, images, and other formats, both online and offline, to support campaign development.</p>	Project report with presentation and questioning
<p><b>S4</b> Use research/survey software to gather audience insight and/or evaluation to support the project.</p>	Project report with presentation and questioning
<p><b>S5</b> Use copywriting techniques to write persuasive text/copy to meet a communications objective ensuring it is in-line with organisational brand guidelines.</p>	Project report with presentation and questioning
<p><b>S6</b> Build and implement multi-channel campaigns across a variety of platforms, either offline or digital media.</p>	Interview underpinned by portfolio of evidence
<p><b>S7</b> Proofread marketing copy ensuring it is accurate, persuasive and is on brand.</p>	Project report with presentation and questioning
<p><b>S8</b> Use software to design and create marketing assets to meet the technical specification.</p>	Interview underpinned by portfolio of evidence
<p><b>S9</b> Contribute to the research of external suppliers to support recommendations and procurement of marketing goods and services.</p>	Interview underpinned by portfolio of evidence
<p><b>S10</b></p>	Interview underpinned by portfolio of evidence

Organise offline and digital assets ensuring they are co-ordinated and legally compliant.	
<b>S11</b> Use a website content management system to publish text, images, and video/animated content.	Interview underpinned by portfolio of evidence
<b>S12</b> Create and maintain spreadsheets to support marketing activities such as project/budget planning and organisation of marketing assets.	Project report with presentation and questioning
<b>S13</b> 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
<b>S14</b> Identify and use data and technologies to achieve marketing objectives.	Project report with presentation and questioning
<b>S15</b> Monitor and amend campaigns to meet budget requirements including time and monetary costs.	Interview underpinned by portfolio of evidence
<b>S16</b> Review campaigns regularly to ensure effectiveness, to optimise the results.	Project report with presentation and questioning
<b>S17</b> Measure and evaluate campaign delivery to identify areas for improvement.	Project report with presentation and questioning
<b>S18</b> Use data analysis tools to record, interpret and analyse customer or campaign data.	Interview underpinned by portfolio of evidence

BEHAVIOUR	ASSESSMENT METHODS
<b>B1</b> Has accountability and ownership of their tasks and workload.	Project report with presentation and questioning
<b>B2</b> Takes responsibility, shows initiative and is organised.	Project report with presentation and questioning
<b>B3</b> Works flexibly and adapts to circumstances.	Interview underpinned by portfolio of evidence
<b>B4</b> Works collaboratively with others across the organisation and external stakeholders.	Project report with presentation and questioning
<b>B5</b> Seeks learning opportunities and continuous professional development.	Interview underpinned by portfolio of evidence
<b>B6</b> 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)
Campaign management K11 K18 K19 K20	How internal stakeholders work to support the delivery	Develop or interpret briefs for external or internal stakeholders	Has accountability and ownership of

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

		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)
Customer experience and the customer journey K13 K21 K22  B6	How to brief and manage external marketing suppliers. (K13)  The customer journey including	None	Acts in a professional manner with integrity and confidentiality. (B6)

	<p>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)</p> <p>The impact marketing has on the level of customer service or the customer experience, including community management channels (K22)</p>		
<p>Research and campaign planning K5 S9</p>	<p>The importance of competitor analysis and how to undertake it. (K5)</p>	<p>Contribute to the research of external suppliers to support recommendations and procurement of marketing goods and services. (S9)</p>	<p>None</p>
<p>IT and digital tools K7 K23 S8 S10</p>	<p>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)</p> <p>Quality management and the maintenance of online and offline assets. (K23)</p>	<p>Use software to design and create marketing assets to meet the technical specification. (S8)</p> <p>Organise offline and digital assets ensuring they are co-ordinated and legally compliant. (S10)</p>	<p>None</p>
<p>Campaign implementation and</p>	<p>Common marketing channels, cross</p>	<p>Build and implement multi-channel</p>	<p>Works flexibly and adapts to</p>

management K12 K16 S6 S11 S15 B3	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)	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)	circumstances. (B3)
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

## Version log

Version	Change detail	Earliest start date	Latest start date	Latest end date
1.0	Approved for delivery	11/12/2023	Not set	Not set

Crown copyright © 2023. You may re-use this information (not including logos) free of charge in any format or medium, under the terms of the Open Government Licence. Visit [www.nationalarchives.gov.uk/doc/open-government-licence](http://www.nationalarchives.gov.uk/doc/open-government-licence)