



A complete guide to
End-Point Assessment
Marketing Executive (L4)

This guide is for:

Employers

Apprentices

Apprenticeship Training Providers

The purpose of this guide is to assist key stakeholders to understand the requirements of End-Point Assessment (EPA) and outlines the processes and support when using The Chartered Institute of Marketing (CIM) as the End-Point Assessment Organisation (EPAO).

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1. The Chartered Institute of Marketing End-Point Assessment Organisation

The Chartered Institute of Marketing (CIM) is approved by the Education Skills Funding Agency (ESFA) as an End-Point Assessment Organisation (EPAO) for the Marketing Executive Level 4 Apprenticeship Standard.

CIM offer an End-Point Assessment (EPA) service allowing Apprentices to take their EPAs at any time provided their Employer has confirmed that the Apprentice is ready for EPA, and a CIM Independent Assessor (IA) has confirmed the Apprentice has met the gateway requirements.

2. Why choose CIM as your EPAO?

As the world's leading professional marketing body, Employers, Apprentices and Apprenticeship Training Providers can be confident in the high standard of the CIM EPA service.

- Excellence in customer service and support during registration and all stages of the EPA.
- Access to CIM's EPA Toolkit via the Knowledge Base on ACE360 with a range of templates to help prepare Apprentices for their EPA and maximise their chances of success.

3. The Marketing Executive Apprenticeship Assessment Methods

Each Apprenticeship Standard has a stipulated Assessment Plan that is designed to assess that the Apprentice has achieved the skills, knowledge and behaviours & values as defined by the Apprenticeship Standards.

EPA for the Marketing Executive Apprenticeship is undertaken over a maximum period of 5 months to cover the assessment methods that are shown below. The Work-Based Project must be agreed by both the EPAO and the apprentice's employer prior to commencement.

Marketing Executive Assessment Methods
Multiple Choice Test (MCT)
Project Showcase – Project Report, Presentation and Q&A
Professional Discussion
Grading – Fail, Pass, Merit, Distinction

4. CIM support for End-Point Assessment

CIM has developed a range of support for Apprentices to help prepare for EPA. Toolkits are made available to Training Providers to share with Apprentices upon registration for EPA via the Knowledge Base on ACE360.



Gateway

- Gateway Form
- Project Plan Summary Template
- Project Plan Summary Guidance



End Point Assessment

- Project Report Template
- Project Report Guidance
- Presentation Template
- Presentation Q&A Preparation Template
- Professional Discussion Preparation Template
- Project Report Evidence Examples



Sample Q's

- Professional Discussion
- MCT
- Presentation Q&A

5. The Apprenticeship Journey and EPA Guidance

The Marketing Executive Apprenticeship is in three phases:



This guide will outline the requirements and process related to each of the above stages and the support offered by CIM. However, it is strongly recommended that Employers, Apprentices and Apprenticeship Training Providers also refer to the full assessment plans held on the [Institute for Apprenticeships and Technical Education](#) website.

6. Apprenticeship Learning Programme with an Apprenticeship Training Provider

6 a – Booking EPA with CIM:

Registration for EPA: Registration for EPA is via the ACE360 Apprenticeship system portal. To gain access to ACE360 please contact support@ace360.org who will set up an account. For existing users of ACE360 you will be able to locate CIM as the EPAO on the system. CIM encourage Employers to register their Apprentices for EPA with CIM at an early stage of the apprenticeship programme in order to access the CIM Toolkit with resources that will support the Apprentice through Gateway and preparation for EPA. An EPA contract will be signed by all parties. At the point of registration, £30 will be payable, with a further payment of 30% once a Gateway booking has been confirmed and the remaining payment made upon completion of EPA.

Gateway Booking:

At the point where the Apprentice and their Employer feels that the Apprentice is working consistently at or above the requirements of the Apprenticeship Standards and have met the prerequisite requirement of having achieved a Level 2 qualification in Maths and English, the Employer or Apprenticeship Training Provider will then be required to contact CIM to make a booking for Gateway.

To support the timely end point assessment activities and in line with the ESFA rules, we request apprentice registration to be a minimum of 6 months prior to the expected gateway date.

Submission Documentation via ACE360:

At Gateway the Apprenticeship Training Provider/Employer will be required to submit the following documentation, templates are provided in the CIM EPA Toolkit:

- CIM Gateway Form.
- CIM Project Plan Summary submission form.
- Evidence of Level 2 Maths and English (e.g. certificates of achievement) or where an education, health and care plan or legacy statement is in place evidence of the Entry Level 3 English and Maths, and BSL Sign Language qualification as an alternative to English qualifications for whom this is their primary language.

Gateway Approval:

A CIM Independent Assessor (IA) will review the Project Plan Summary, and if approved, CIM will notify the Employer/Apprenticeship Training Provider within seven working days and confirm that the Apprentice is ready to begin the EPA Period.

Scheduling EPA:

CIM will agree the schedule for each EPA element with the Employer/Apprenticeship Training Provider and these dates will be recorded on the Project Plan Summary IA Review Form, and the form will be uploaded to the Apprentice record on ACE360 for the Apprenticeship Training Provider to access.

If the IA decides that the Apprentice has not yet met the Gateway requirements of the Apprenticeship Standard, CIM will advise the Training Provider and Employer so that the Apprentice can undertake further learning and study prior to EPA taking place.

6 b – Deciding and agreeing the Project:

Apprentices agree with their Employer, in consultation with their Apprenticeship Training Provider, a work-based project. The Project must be designed to allow the Apprentice the opportunity to evidence all of the KSBs mapped to this assessment method and be comparable with the level of demand of the job role as defined by the Apprenticeship Standard and Assessment Plan, as well as being suitable to the Apprentice's particular employer and job.

A Project Plan Summary must be submitted to CIM via ACE360 for approval. The Project Plan Summary will need to demonstrate how the Apprentice can demonstrate the knowledge, skills and behaviours as defined by the Assessment Plan. A template is provided.

6 c – Reasonable Adjustments:

Reasonable Adjustments are adjustments that are made to the method of assessment for an Apprenticeship Standard to enable disabled or disadvantaged Apprentices to demonstrate their knowledge, skills and behaviours to the level required by the specification for that Apprenticeship Standard.

CIM Reasonable Adjustments Policy will apply to any EPA and requests for Reasonable Adjustments must be made at Gateway. The policy is available from the Knowledge Base section on ACE360.

7. Gateway

7 a – Gateway Submission:

The following documents must be submitted at Gateway via ACE360 usually by the Apprenticeship Training Provider on behalf of the Apprentice and Employer:

- CIM Gateway Form
- Project Plan Summary Form
- Evidence of Level 2 Maths and English (e.g. certificates of achievement) or where an education, health and care plan or legacy statement is in place evidence of the Entry Level 3 English and Maths, and BSL Sign Language qualification as an alternative to English qualifications for whom this is their primary language.

7 b – Gateway Approval:

CIM provide notification of acceptance for the Apprentice to proceed to EPA within seven working days of submission, provided that the Work-based Project has been approved.

Submission at Gateway will also act as notification that the Employer is approving the Apprentice to undertake EPA with CIM.

Confirmation of Gateway approval will also act as notification of the start of the EPA period. EPA must be completed within a maximum of 5 months from date of this confirmation.

A member of the CIM EPAO team will contact the Apprenticeship Training Provider/Employer within seven working days of Gateway submission with dates for the EPA elements/requirements:

- Multiple Choice Test (within 4 weeks of EPA commencing)
- Project Report Submission (within 4 months of EPA commencing)
- Presentation Q&A (within 3 weeks of Project Report submission)
- Professional Discussion (within 3 weeks of Project Report submission)

The EPA dates will be recorded on the Project Plan Summary IA Review Form and will be uploaded to the Apprenticeship record on ACE360 for the Apprenticeship Training Provider to access. Should any of the dates on this form be missed without prior approval by CIM, the grade for that element of the EPA will be recorded as a fail.

8. End-Point Assessment Period

Within 5 months from Gateway Approval



8 a - Multiple Choice Test (MCT)

The MCT is an online test and is undertaken in exam conditions using remote invigilation. Apprentices cannot refer to any books or materials during the examination. Apprentices will be given a time window for when they can schedule their MCT assessment.

The structure of the MCT is:

- 50 Multiple Choice Questions - each worth 1 mark (with 4 answer options for each)
- Duration 90-minutes

8 b – Submission and Assessment of Project Report

The Work-Based Project will be agreed between the Employer and the Apprentice prior to Gateway period. Apprenticeship Training Providers will support Employers and Apprentices in selecting an appropriate project.

Apprentices should:

- Complete their Project Report using the CIM template, within 4 months of notification of the start of the EPA process (i.e. gateway approval).
- Submit their Project Report to the CIM at the end of the 4 months and prior to the Presentation and Q&A.
- Use the CIM Project Report Template as a framework to ensure the project includes evidence of how the KSBs have been applied with real customers in a work-based context.
- Not exceed 3,500 words (+/- 10 %), excluding annexes and references

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

The Project will be assessed by a CIM Independent Assessor (IA) and results will be recorded on a marksheet developed by CIM. Results will be made available to Employers, the Apprentice and the Apprenticeship Training Provider within 10 working days from receipt by CIM. An Apprentice may not proceed to the Presentation, Q&A or the Professional Discussion unless a pass has been achieved in the Project Report.

8 c – Presentation and Q&A:

The Presentation with Q&A will take place with a CIM IA within 3 weeks of the submission of the Project Report using video-conferencing technology unless otherwise agreed by CIM.

The Presentation and Q&A will be made to the CIM Independent Assessor (IA), this will consist of:

- A 10-minute (+/- 10%) Presentation - For the Apprentice to give an evaluation of their work and progress during the project. The presentation should give a competency-based example demonstrating each of the following:
 - 1. How they developed a marketing skill during delivery of the project
 - 2. How they will change their future performance or delivery based on learnings from delivery of the project.
- It is left to the Apprentice to use their creativity to select the most appropriate delivery aids and method/s for their presentation. For example Apprentices can use presentation aids such as power point, video clips, flip chart, work products, notes. The IA will not only assess the content of the presentation but also the delivery and communication skills (as required in the standard).
- The presentation will be followed by a 20 minute (+/-10%) Q&A session with the IA - This will allow the IA to further discuss and test elements of their presentation. It will also test any areas of the Work based project highlighted by the IA during assessment of the Project Report as needing further investigation/testing and seek to explore any KSBs mapped to this assessment method that are yet to be evidenced. The Independent Assessor must ask the Apprentice 5-7 open questions; follow up questions are allowed to seek clarification. Questions must seek to assess KSBs mapped to this method not evidenced through the Project Report and Presentation, and/or depth of understanding to assess performance against the distinction criteria. Apprentices may refer to their Project Report, evidence contained with the Project Report annexes, Presentation or Presentation aids when answering the questions.

CIM will provide a PowerPoint template for the Presentation, or the Apprentice may use their own house-style template. The Apprentice may select the most appropriate delivery aids and methods for their presentation and adapt this format to make use of other presentation aids such as flip charts, video clips etc.

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

The IA will use a mark sheet, developed by CIM, to record the assessment judgments of the Apprentice's presentation, answers and performance and grade the Apprentice's presentation and the subsequent Q&A session.

Please note that the Presentation and Q&A will be recorded for assessment quality assurance purposes.

8 d – Professional Discussion:

The Professional Discussion will conclude the end-point assessment process. This will be conducted using video-conferencing technology unless otherwise agreed by the CIM.

The Professional Discussion follows immediately after the Presentation/Q&A.

The purpose of the Professional Discussion is to:

- Explore specific aspects of the Apprentice's work, including how it is carried out.
- Enable the Apprentice to talk through their learning on aspects of their work, allowing the IA to question them on this.
- Provide sufficient and reliable evidence for the IA to assess and grade the Apprentice.

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

The CIM IA will complete a mark-sheet developed by CIM to record assessment judgements. The IA will grade the outcome in accordance with the assessment plan.

Please note that the Professional Discussion will be recorded for assessment quality assurance purposes.

8 e – Grading:

Following completion of all elements of EPA, the CIM IA will then provide an overall grade for the Apprenticeship, based on the Apprentice's performance in the three EPA components and using the grading guidance within the Apprenticeship Standard End-Point Assessment Plan and Grading Sheet developed by CIM.

There are four possible grades for the apprenticeship:

- Fail
- Pass
- Merit
- Distinction

A pass demonstrates that the Apprentice is competent in all criteria of the Apprenticeship Standard. Grading is calculated as per the following table:

Apprenticeship Standard Grading Rules – Marketing Executive Level 4			
Multiple Choice Test (MCT) Grade	Project Showcase Grade	Professional Discussion Grade	Overall Grade
A fail in one or more assessment method			Fail
Pass	Pass	Pass	Pass
Distinction	Pass	Pass	Pass
Pass	Distinction	Pass	Pass
Pass	Pass	Distinction	Pass
Distinction	Pass	Distinction	Pass
Distinction	Distinction	Pass	Merit
Pass	Distinction	Distinction	Merit
Distinction	Distinction	Distinction	Distinction

All judgements made by the IA will be moderated in accordance with the CIM's Internal Quality Assurance Strategy before the Apprentice is notified of the outcome.

8 f – Results and Feedback:

- Results and feedback for each element of the EPA will be made available to the Apprentice, Employer and Apprenticeship Training Provider 10 working days from the date of the last EPA element, following internal quality assurance and moderation.
- Final overall results, grading and the mark sheets for each element of the EPA, which will include feedback for the Apprenticeship, will be made available 10 working days from the date of the last EPA element.
- CIM will notify the Education and Skills Funding Agency (ESFA) of the outcome to enable CIM to claim the Apprentice's certificate.

8 g – Resits/Retakes:

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

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

- In all cases the Apprentice's employer will need to agree that a re-sit/re-take is the appropriate course of action and it is the employer's decision as to how many resits/takes are permitted, based on the criteria below
- A re-sit does not require further learning, whereas a re-take does
- All re-sits/re-takes will still be graded fail/pass/distinction (so no limit to grades on re-sit/retakes) and combined with the grades for the other assessment methods to determine the EPA grade as per grading procedure described above.
- Apprentices should have a supportive action plan to prepare for the re-sit or re-takes
- MCT: If the Apprentice fails the MCT they will not progress to the other stages of the EPA until a pass grade is achieved
- Project Showcase: If the Project Report component of the Project Showcase does not meet the fundamental criteria in Annex B (S1.1) they will not progress to the Presentation with Q&A component of this method, nor the Professional Discussion. Apprentices are able to improve

their project report and formally re-submit this to the EPAO (to be clear this should be based on the same work based project). If the Apprentice fails the Presentation with Q&A component of the Project Showcase they are permitted to re-sit this.

- Professional Discussion: If the Apprentice fails the Professional Discussion they are permitted to re-sit this.
- EPAOs must ensure that Apprentices complete a different MCT and receive different questions in the Project Showcase's Q&A and for the Professional Discussion when taking a re-sits/retakes.
- Where it is considered that further learning is required, or a different project needs to be undertaken for an Apprentice to pass the Apprenticeship it will be a matter for the Employer to decide if this is the appropriate course of action .

CIM require a minimum of 10 working days' notice for any resit/re-take booking. For resits/retakes assessment costs and policy this is available on the Knowledge Base section of ACE360.

9. Withdrawal of an Apprentice

Should an Apprentice withdraw from their programme or fail to complete or wishes to take a break and resume the Apprenticeship at a later stage, the Employer must inform CIM, their Apprenticeship Training Provider and the Education and Skills Funding Agency.

Depending on the point of withdrawal, there may be some costs incurred for assessments already taken.

Before changing the status of the Apprentice on ACE360 please could you inform CIM of any Apprentices who are withdrawing by emailing us at apprenticeships@cim.co.uk.

10. Complaints and Appeals

Appeals

If the Apprentice or the Employer wishes to appeal any assessment decision, they should refer to CIM's Appeals Policy (Apprenticeships). This is available on the Knowledge Base section on ACE360.

Complaints

Any Apprentice or Employer who wishes to complain about any aspect of the End-Point Assessment process other than an assessment decision, should email details of their complaint to apprenticeships@cim.co.uk

The complaints policy is available on the Knowledge Base section on ACE360.

11. Special Consideration

Special consideration may be applied for in cases where the Apprentice has been fully prepared for the End-Point Assessment but their performance or attendance on the day of the End-Point Assessment has been affected by factors beyond their control, such as ill health, an accident or a family crisis that is likely to have had an impact on the Apprentice's performance.

Special consideration is given to an Apprentice relating to events which occur just before, or on the assessment day or the date for submission of an End-Point Assessment. CIM End-Point Assessment Organisation (EPAO) aligns its Special Consideration Policy with regulatory requirements.

If the Apprentice wishes to apply for a Special Consideration, they should refer to the Special Consideration policy and claim form available on the Knowledge Base section on ACE360.