



CIM

The Chartered  
Institute of Marketing

A complete guide to

# Apprenticeships

Marketing Assistant (Level 3)

Marketing Executive (Level 4)

Marketing Manager (Level 6)

# This guide is for:

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**Employers**

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**Apprentices**

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**Apprenticeship Training Providers**

The purpose of this guide is to assist the key stakeholders understand the requirements of each stage of the Apprenticeship journey from registration to achievement and explains the processes and support when using The Chartered Institute of Marketing (CIM) as an End-Point Assessment Organisation (EPAO).

Stakeholders should refer to **The Chartered Institute of Marketing Guide to End-Point Assessment**, for further detail and guidance relating to the End-Point Assessment (EPA) process itself.

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## 1

# Introduction to Apprenticeships

## 1.1 – Introduction to Apprenticeship Standards

CIM has worked with Employers, Universities and Apprenticeship Training Providers as part of a Trailblazer group to develop apprenticeship standards for marketing that accurately reflect the knowledge, skills and behaviours required to drive the development of the marketing profession now and in the future.

The following Apprenticeship Standards are now available for delivery, full details can be found on the Institute for Apprenticeships and Technical Education website:

- [\*\*Marketing Assistant Level 3 Apprenticeship Standard\*\*](#)
- [\*\*Marketing Executive Level 4 Apprenticeship Standard\*\*](#)
- [\*\*Marketing Manager Level 6 Apprenticeship Standard\*\*](#)

**Marketing Assistants will be assessed on the Knowledge, Skills and Behaviours relating to the following duties:**

Duties	Marketing Assistant
Duty 1	Create and edit content in collaboration with senior colleagues for offline and/or digital marketing channels, such as website, social media, sales materials or event displays, ensuring that brand guidelines are met in order to achieve marketing objectives.
Duty 2	Publish editorial, creative and video content via social media or video sharing platforms, e.g. LinkedIn, Twitter, Instagram.
Duty 3	Specify, purchase and quality assure marketing goods and services from external suppliers e.g. place a brochure print order, book exhibition space, book media space.
Duty 4	Manage the cataloguing of offline and digital marketing assets including permissions and compliance, in-line with marketing regulations and legislation, e.g. storage and organisation of marketing materials, administering creative asset management systems.
Duty 5	Monitor and evaluate marketing delivery effectiveness by producing and interpreting reports from one or more marketing tools or systems, e.g. marketing automation report; social media monitoring report; analytics and metrics reports, budget tracker.
Duty 6	Contribute to the planning, delivery or evaluation of marketing activity through creation of written planning and evaluation documents and presentations, e.g. marketing campaign results, market and customer intelligence research, update marketing plan.
Duty 7	Use content management software to publish and refresh effective online content to engage with different customer segments.
Duty 8	Use appropriate primary and secondary research methods including survey tools and desktop research to gather marketing insight or evaluation, and inform marketing decisions, planning and delivery.
Duty 9	Monitor marketing expenditure and activities to a specified budget and plan, ensuring invoices are processed efficiently.
Duty 10	Efficiently and effectively source creative assets (photographs, graphically designed creative, video content) for the production of marketing communication collateral in-line with regulations and legislation.
Duty 11	Establish and maintain effective day to day relationships and communication between the marketing function and internal and external stakeholders to support marketing activities.
Duty 12	Implement marketing activities through marketing administration, e.g. organise an exhibition display, arrange a marketing meeting, organising an event.

## 1.1 – Introduction to Apprenticeship Standards (continued)

Apprentices will acquire and be assessed against the following:

Knowledge, Skills & Behaviours	Marketing Executive	Marketing Manager
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>• Marketing Concepts &amp; Theories</li> <li>• Business understanding and Commercial Awareness</li> <li>• Market Research</li> <li>• Products and Channels</li> </ul>	<ul style="list-style-type: none"> <li>• Marketing Concepts &amp; Theories</li> <li>• Business understanding and Commercial Awareness</li> <li>• Research &amp; Insight</li> <li>• Product and Service Development</li> </ul>
<b>Skills</b>	<ul style="list-style-type: none"> <li>• Marketing Campaigns</li> <li>• Interpersonal and Communication Skills</li> <li>• Service Delivery</li> <li>• Budget Management</li> <li>• Evaluation and Analysis</li> <li>• Systems and Processes</li> </ul>	<ul style="list-style-type: none"> <li>• Marketing Strategy</li> <li>• Advanced Interpersonal and Communication Skills</li> <li>• Service Delivery and Improvement</li> <li>• Resource Management</li> <li>• Planning and Analysing</li> <li>• Commercial Approach</li> <li>• Leadership</li> <li>• Systems and Processes</li> </ul>
<b>Behaviours</b>	<ul style="list-style-type: none"> <li>• Agile and flexible</li> <li>• Creative Thinker</li> <li>• Resilience and continuous improvement</li> <li>• Professionalism and Emotional Intelligence</li> </ul>	<ul style="list-style-type: none"> <li>• Agile and flexible</li> <li>• Creative and Commercial Thinker</li> <li>• Resilience and continuous improvement</li> <li>• Professionalism and Emotional Intelligence</li> </ul>

## 1.2 – Benefits of an Apprenticeship

- Upskilling and supporting the existing workforce, for the roles the organisation needs.
- Can be used for new starters or those about to enter the workplace.
- Retention and increased employee motivation and satisfaction.
- Tangible improvements to the Apprentice and their Employer through work based assessment.
- Marketing Apprentices who study with a CIM Accredited Study Centre may also have the

- opportunity to achieve an internationally recognised **CIM qualification** and benefit from Student Membership status which will provide Apprentices with a range of membership benefits for their Apprenticeship programme, learning and job role, including access to CIMs regional network of events and sector interest groups. **Additional fees may apply.**
- Address skills gaps in the current market and create real benefits for the taxpayer and the wider economy.

## 2

# Choosing CIM as your EPAO

## 2.1 – Introduction to CIM

**CIM** is the world's leading professional marketing body with a world-wide membership of professional and Chartered Marketers.

For over 100 years, CIM has supported, represented and developed marketers, teams, leaders and the profession in driving long term organisational performance

through marketing. CIM's mission is to create marketing advantage for the benefit of professionals, business and society.

CIM Accredited Study Centres deliver world-renowned qualifications making CIM uniquely able to improve marketing capability at an individual and business level.

## 2.2 – CIM Support for Apprentices and Employers

- As part of the Trailblazer group involved in the design and development of the Apprenticeship Standards, Employers, Apprentices and Apprenticeship Training Providers can be assured that CIM has a detailed understanding of the requirements of EPA.
- Excellent customer service and support during registration and all stages of the EPA.
- Access to CIM's EPA Guide and Toolkit with a range of templates to help prepare Apprentices for their EPA and maximise their chances of success.
- Apprentices also studying for a CIM qualification, will have access to a range of CIM professional support such as:
  - *Webinars, toolkits, practical guides and online journals to support Apprentices with their Apprenticeship projects and job roles.*
  - *A range of regional networking events and sector interest groups.*
  - *Content via access to the 'MyCIM', an online portal which provides content on latest marketing thinking by leading industry experts, stimulating articles, editorials and blogs. Apprentices will also receive a quarterly magazine 'Catalyst' which explores marketing news, topics and trends.*

## 3

# The Marketing Apprenticeship Journey with CIM

With CIM as your EPAO, Apprentices are supported in all stages of the Apprenticeship journey.



**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 recommend that Employers, Apprentices and Apprenticeship Training Providers also refer to the website of [\*\*\*Institute for Apprenticeships and Technical Education\*\*\*](#) for full Marketing Standards and Assessment Plans.

## 3.1

# Registration

## 3.1a – Entry Requirements for Marketing Apprenticeship Standards:

There are no entry requirements, entry is determined by the Employer, however Apprentices must be over 16 years of age at the start of their apprenticeship and the apprenticeship must allow the Apprentice to acquire substantive new skills (see funding rules in section 3.1e). The Employer will need to ensure the Apprentice's job and skills development programme enables the Apprentice to gain the knowledge, skills and experience as defined by the standards.

Apprentices without a minimum of Level 2 English and Maths will need to achieve this level prior to taking the EPA. For those with an education, health and care plan or a legacy statement, the Apprenticeship's English and Maths minimum requirement is Entry Level 3. British Sign Language qualifications are an alternative to English qualifications for those whom this is their primary language.

## 3.1b – Selecting an Apprenticeship Training Provider

All Apprenticeship Training Providers must be approved on the [Register of Apprenticeship Training Providers \(RoATP\)](#) to be eligible to receive government funding to deliver Apprenticeships.

### **CIM work with several selected *CIM Accredited Study Centres* who are also approved on RoATP providing Employers with additional benefits:**

- A proven track record in delivery marketing training and qualifications regularly quality assured by CIM.
- Supported by CIM to assist Employers in developing an apprenticeship programme mapped to the requirements of the standards and that enable their Apprentice to achieve a CIM qualification alongside their apprenticeship.
- Access to CIM Apprenticeship Training Provider Toolkit used to ensure the Apprentice is appropriately supported throughout the Apprenticeship journey and prepared for EPA.
- Assured level of support as outlined in 3.2c.

CIM can be selected as an EPAO for any Apprentice by any RoATP approved Apprenticeship Training Provider (see section 3.1d).

Employers, Apprentices and Apprenticeship Training Providers will sign an Apprenticeship Commitment Statement outlining the key responsibilities of each party. The template can be downloaded from the Education and Skills Funding Agency (ESFA) website:

<https://www.gov.uk/government/publications/Apprenticeship-commitment-statement-template>



### 3.1c – Support from Apprenticeship Training Providers

Apprenticeship Training Providers will provide the necessary training and support for the Apprentice and their Employer. Support will vary between providers and should be discussed during selection stage.

#### CIM Accredited Study Centres will offer the following support:

- Work with the Employer and the Apprentice to develop an apprenticeship agreement and individual learning plan.
- Training for the knowledge required for the apprenticeship and if applicable CIM qualification.
- A range of delivery modes such as classroom, day release or via distance/online learning.
- On programme support and mentoring to help Apprentices develop the skills and behaviour requirements of the apprenticeships.
- Undertake reviews with Employers to monitor progress of Apprentices.
- Support the Apprentices and Employers in selecting a work based project that will meet the requirements of the EPA using CIM approved tools.
- Work with the Apprentice to ensure they meet all Gateway requirements in advance of the EPA.
- Prepare the Apprentice for EPA with mock samples developed by CIM.
- May undertake all administrative arrangements on behalf of the Employer in relation to the booking and preparation for EPA.
- On programme assessment using CIM tools to provide feedback to the Apprentice and Employer on their progress towards meeting the requirements of the Apprenticeship Standards and if applicable the CIM qualification.

### 3.1d – Registration with CIM for End-Point Assessment

Employers who select CIM as their EPAO are encouraged to register their Apprentice with CIM for EPA at an early stage in the Apprenticeship programme, at which time they will be asked to complete an End-Point Assessment Contract, request a provisional Gateway date and pay a deposit of £30 per Apprentice.

Once an EPA Contract is signed by the Employer and CIM, CIM will then provide the Employer and their Apprentice access to the CIM Toolkit with resources to support their Apprentice through the Gateway and EPA process, including access to mock assessments and templates for submission of the work based project plan and report for the Project Showcase element of the assessment.

### 3.1e – Funding and Levy Guidance

Full details on how the Levy and funding is calculated, how Employers can register for the Apprenticeship Service to open a digital account and how the levy can be spent can be found at [Institute for Apprenticeships and Technical Education](#) website.

Each Apprenticeship Standard is allocated a funding band by the Institute for Apprenticeships and Technical Education. Funding, up to the maximum of the funding band for that apprenticeship, can be used to pay for apprenticeship training and EPA of the Apprentice. If the costs of training and assessment go over the funding band maximum, Employers will need to pay the difference with other funds.

The funding bands for marketing standards are as follows:

- **Marketing Assistant**  
Level 3 – Maximum Funding £7,000
- **Marketing Executive**  
Level 4 – Maximum Funding £6,000
- **Marketing Manager**  
Level 6 – Maximum Funding £9,000

*Note: Approximately 20% of the apprenticeship funding band should be budgeted to cover the cost of EPA.*

*Funding can be used for apprenticeships at a higher level than a qualification already held by the Apprentice. It may be possible to use funding for an apprenticeship at the same or lower level than a qualification already held by the Apprentice, only if the apprenticeship will allow the Apprentice to acquire substantive new skills and the training is demonstrably different from any prior qualification or apprenticeship.*

The achievement of Level 2 English and Maths is funded by government outside of the Levy funding and Employers should discuss this with their Apprenticeship Training Provider.

## 3.2

## On Programme Learning

- Marketing Assistant Level 3 - typically 18 months
- Marketing Executive Level 4 - typically 16 months
- Marketing Executive Level 6 - typically 25 months

All Apprentices must be employed with agreed employment terms and conditions in accordance with UK legislation and be in a job role that allows them to work with experienced staff, learn the skills as defined by the marketing standards and provides time for study and development during their working week.

### 3.2a – Employer Support and Commitment:

- Register as an Employer with the Apprenticeship Service to access and manage funding from your Apprenticeship account. Full details of how to register for the Apprenticeship Service can be found at <https://www.gov.uk/guidance/manage-apprenticeship-funds>
- Provide their Apprentice with an Apprenticeship agreement that outlines the dates and duration of the apprenticeship, the occupation for which they are being trained and the name of the marketing standard, an outline of the training they will receive and any qualifications they will work towards. An [Institute for Apprenticeships and Technical Education](#) apprenticeship agreement template is provided. The Employer and the Apprentice must sign this agreement.
- Complete a **Commitment Statement** provided by the ESFA with Apprentices and any Apprenticeship Training Provider involved in the delivery of the apprenticeship programme. The Commitment Statement must outline the planned content and schedule for training, what is expected of and offered by the Employer, the Apprenticeship Training Provider and the Apprentice and include information on how to resolve queries or complaints.

### 3.2b – Apprenticeship Training Provider Support:

- Learning to enable the Apprentice to develop and apply the knowledge and skills required by the Apprenticeship Standards. Learning will be undertaken both on and off the job.
- Apprentices must be allowed and must evidence 20% off-the-job training.
- Agreement of a work based project, for the Project Showcase, with Employer and Apprenticeship Training Provider.
- Preparation of a summary of the chosen work based project for submission and approval at the Gateway for EPA. CIM provide a template to support this.
- Preparation for EPA using CIM EPA Toolkit.
- Confirmation of registration for Gateway to EPA at least 6 weeks in advance of the Gateway date.
- Achievement of a CIM qualification where supported by the Employer.

### 3.2c Agreement of the Work Based Project

Apprentices agree with their Employer, in consultation with their Apprenticeship Training Provider a work based project for the Project Showcase assessment element at EPA. The project must be based on a real marketing activity comparable with the level of demand of the job role as defined by the Apprenticeship Standards and assessment plan.

Apprentices who are also studying for a CIM qualification prior to gateway will have already undertaken an assessment which is based on a work based project, developed by CIM.

These projects have been developed to ensure that the project undertaken by CIM learners is comparable with the level of demand, knowledge, skills and behaviours indicated by the apprenticeship assessment plan and therefore these projects could be used by the Apprentice as a basis for the Project Showcase, Q&A and Professional Discussion at EPA.

### 3.2d CIM Qualifications

CIM's qualifications have been developed from extensive research with Employers and Employees in both marketing and broader business functions and are based on ***CIM's Professional Marketing Competencies 2018***, a framework of marketing standards, which provide a guide to the skills and behaviours that are expected of professional marketers at varying levels of proficiency. They offer the professional marketer the reassurance that the skills and knowledge they will develop when studying a CIM qualification are closely matched to those required in the market.

**The following benefits can be gained by Apprentices working towards achieving the CIM qualifications alongside of their apprenticeship:**

- A structure to gaining the knowledge and skills requirements of the Apprenticeship standards.
- Assurance that the Apprentice has the underpinning knowledge and skills required for the standards and the requirements of the EPA.
- Added value of achieving a regulated transferrable qualification.
- Access to CIM study support and resources throughout their apprenticeship.
- Fast track access to CIM Membership grades and post nominals.
- Progression opportunities to further vocational or higher education qualifications.

Qualifications are not a mandatory requirement of the Apprenticeship Standards, however Employers whose Apprentices work towards and achieve CIM Marketing qualifications will have assurance that the Apprentice has gained all of the knowledge and skills requirements of the Marketing Apprenticeship Standards.

Detailed mapping of the CIM qualifications to the Apprenticeship Standards can be found in Appendix B. Below is a summary of the CIM qualifications and the mandatory modules that provide the knowledge and skills for the Apprenticeship Standards:

Apprenticeship Standard	CIM Qualifications/Modules 2019	
<b>Marketing Assistant Level 3 Apprenticeship</b>	CIM Foundation Certificate in Professional Marketing CIM Foundation Certificate in Professional Digital Marketing	
	Marketing Principles	
<b>Marketing Executive Level 4 Apprenticeship</b>	CIM Certificate in Professional Digital Marketing CIM Certificate in Professional Marketing	
	Applied Marketing	Planning Campaigns
<b>Marketing Manager Level 6 Apprenticeship</b>	CIM Diploma in Professional Marketing	
	Marketing & Digital Strategy	

Partial but substantial coverage of the Marketing Apprenticeship Standards is also achieved via the CIM Diploma and Certificate and Foundation Certificate in Professional Marketing 2014 – see mapping in Appendix B.

### 3.2e Off-the-Job Time:

Employers must allow Apprentices a minimum of 20% time off-the-job to complete learning and assessment. 'Off-the-Job' includes activities associated with the learning and development of knowledge, skills and behaviours related to the Apprenticeship Standards that are undertaken outside 'normal' work activity but within 'normal' working hours.

#### Off-the-job activities may include:

- External training such as classroom or online learning programmes to gain knowledge required for Apprenticeship Standards.
- Training at work by a manager, supervisor or mentor relating to the acquisition of new knowledge and skills associated with the Apprenticeship Standards.
- Self-study, including reading and research. Apprentices studying CIM qualifications will be able to access 'MyCIM' portal for study resources.
- Internal training or work events that enable Apprentices to develop the knowledge, skills and behaviours of the Apprenticeship Standards.
- Attendance at conferences, seminars, networking and trade events provided these are linked to the knowledge, skills and behaviours of the marketing standards.
- Preparation for EPA activities, including the work based project for the Project Showcase.

**Note: Study for Level 2 English and Maths cannot be included in the 20% 'off-the-job' time.**

The Employer is responsible for recording and evidencing the off-the-job training by issuing a Commitment Statement that sets out the Employer's commitment to release the Apprentice and ensures there is sufficient content to establish eligibility for Apprenticeship funding. Full guidance and a template for the Commitment Statement is provided by the ESFA:

<https://www.gov.uk/government/publications/apprenticeships-off-the-job-training>

Employers should also provide appropriate supervision and mentoring support in the workplace, consider any costs for additional learning activities, e.g. professional conferences and allocate time for formal progress review with the Apprentices.

## 3.3

# Gateway to EPA

At the point where the Apprentice and their Employer feel 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 English and Maths, the Apprenticeship Training Provider/Employer will contact CIM to confirm a booking for Gateway. Gateway bookings must be confirmed at least six weeks in advance of required Gateway date.

### 3.3a – Gateway Submission Requirements:

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

- CIM Gateway Checklist
- CIM Project Plan Summary Submission Form
- Evidence of Level 2 English and Maths
- The Apprentice's 350-word Project Plan using the CIM template

The Employer should agree with the Apprentice the subject/outline of the Work Based Project at gateway - this should be supported with reference to CIM's project guidance and examples (Level 3 only). Submission of the Project Plan will also act as notification that the Employer is approving the Apprentice to undertake EPA with CIM.

### 3.3b – Gateway Approval:

- A CIM Independent Assessor (IA) will review the Gateway Checklist and ensure all Gateway requirements have been met.
- The project plan will be reviewed by a CIM IA to ensure comparability of level of demand and scope with other projects.
- CIM provide notification of acceptance for the Apprentice to proceed to EPA within seven working days of Gateway submission provided the project plan is approved.
- A member of the CIM EPAO team will contact the Employer/Apprenticeship Training Provider within seven working days of Gateway Approval to confirm dates for the EPA elements:
  - Online Multiple Choice Test (Level 3 and Level 4)
  - Deadline for submission of the Project Showcase Report
  - Date for Project Showcase Presentation Q&A (Level 4 and Level 6) and Professional Discussion.

These dates will be recorded on the Gateway Checklist that will be returned to the Employer and the Apprenticeship Training Provider.

- Confirmation of approval of the Project Plan and Gateway Checklist will also act as notification of the start of the EPA period.
- Should any of the dates on the Gateway Checklist be missed without prior approval by CIM the grade for that element of the EPA will be recorded as a fail.
- If the IA judges that the Apprentice has not yet met the gateway requirements of the Standard, the EPAO will advise the Employer so that the Apprentice can undertake further learning and study prior to EPA taking place.

## 3.4

# EPA Period

### 3.4a – The EPA Period

The final stage of the apprenticeship journey is assessment of the Apprentice against the marketing standards at EPA. The EPA is undertaken over a period of several months and includes a work based project which must be agreed with the Employer.

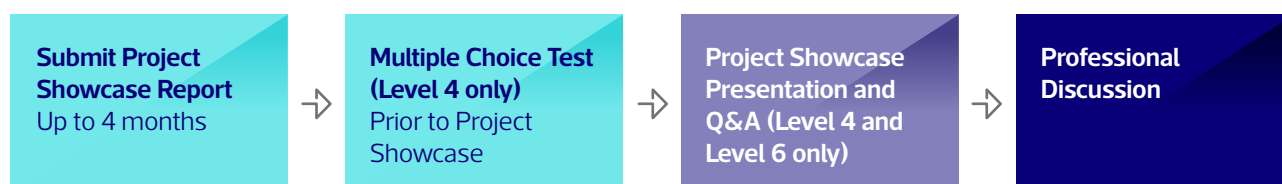
EPA is undertaken by an IA and consists of the following assessment elements. Employers, Apprentices and Apprenticeship Training Providers should refer to CIM EPA Guide for full details:

#### • 6 months from confirmation of Gateway Approval (Level 3)



For Level 3, the assessment methods (Knowledge Test and Work Based Project Showcase) can be taken in any order. However, as the professional discussion is underpinned by the project report it must take place after the project report has been submitted.

#### • 5 months from confirmation of Gateway Approval (Level 4 & Level 6)



### 3.4b – End-Point Preparation Support

CIM provide a detailed EPA Guide and Toolkit for Employers and their Apprentices for use prior and during the EPA period including:

- Project Plan Submission Form and Template
- Project Report Template
- Mock Questions for Multiple Choice Test (Level 3 & Level 4)
- Presentation Template (Level 4 & Level 6)
- Preparation templates for Q&A (Level 4 & Level 6)
- Mock Questions for Q&A (Level 4 & Level 6)
- Preparation template for Professional Discussion
- Mock questions for Professional Discussion

## 3.5

# Results

- 10 working days from date of each EPA element

### 3.5a – Results and Grading

- Results and feedback for each element of the EPA will be made available to the Apprentice, Employer and Apprenticeship Training Provider within ten working days from the date that the EPA element took place.
- The final grade for the apprenticeship will be based on the performance across the above elements as follows:

Grade awarded	Apprentices must achieve		
	Level 3	Level 4	Level 6
<b>Pass</b>	Pass in both elements of the EPA	Pass in all three elements of the EPA	Pass in both elements of the EPA
<b>Merit</b>	Pass in the knowledge Test and Distinction in the Project Showcase	Distinction in both the Project Showcase and one other element of EPA	Distinction in the Project Showcase and a Pass in the Professional Discussion
<b>Distinction</b>	Distinction in both elements of EPA	Distinction in all elements of the EPA	Distinction in both elements of the EPA

- Final results, grading and the mark sheets for each EPA element will include feedback for the Apprentice and will be made available ten working days from the last date of the last test element.
- CIM will notify the Education and Skills Funding Agency (ESFA) of the outcome to enable CIM to claim the Apprentice's certificate.

### 3.5b – Resits

If the Apprentice fails any element of EPA assessment, it is the Employer's decision as to whether the Apprentice may resit, it is recommended that Employers consult with their Apprenticeship Training Provider. Employers must book the Apprentice for a resit which must take place within two months from the issue of results, the total EPA period must not exceed seven months (Level 4 & Level 6). Resits must take place within the 6 months given to EPA period for Level 3. Employers should consult with their Apprenticeship Training Provider as to whether additional support and learning is required. CIM require a minimum of ten working days notice for any resit.

There is no capping on grading for any resits.

A pass in the Multiple Choice Test (Level 4 only) must be achieved before an Apprentice can proceed to the next stage of the EPA. Should a learner fail the Project Report component of the Project Showcase, feedback will be provided, they may not proceed to the Presentation, Q&A or Professional Discussion.

## 3.6

## Progression

Apprentices who achieve the Marketing Apprenticeship and/or a CIM qualification will be eligible for access to CIM membership which is created to continually develop marketing capabilities and ensure marketers are kept up-to-date and informed in current marketing knowledge and expertise. Those Apprentices who have taken a CIM qualification alongside their Apprenticeship will benefit from a fast-track application to upgrade their student membership to full member MCIM or Chartered Marketer.

Members will have the opportunity to apply for additional membership grades with post nominals up to Full Member MCIM and Chartered Marketer the most prestigious accolade in marketing that can only be awarded by CIM.

CIM membership and post nominals demonstrate the experience, knowledge and commitment to maintaining the highest standards of marketing knowledge and expertise.

*Full details of CIM membership grades can be found at <https://www.cim.co.uk/membership/career/>*

# Appendix A

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**Marketing Apprenticeship Standards – A summary**



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## Marketing Assistant Level 3 Apprenticeship Standard

### **Overview**

It is typically the entry route for many marketing professionals who progress their career into more senior marketing positions. In their daily work, an employee in this occupation interacts with a wide range of internal colleagues and external marketing suppliers. Depending on the size and structure of the organisation, this could include collaboration with colleagues from sales, operations, PR, IT, the customer insight team and finance as well as interaction externally with clients/customers and suppliers such as printers, digital agencies, PR and media agencies, event display companies, market research agencies, and media sales professionals.

Depending on the size of the organisation and its Marketing function, the Marketing Assistant may report into a Marketing Executive, a Marketing Manager, Marketing Director or (in small organisations) a Sales/Operational Manager or Managing Director.

### **Typical responsibilities**

An employee in this occupation will be responsible for coordinating and delivering specific marketing activities which could include, but are not limited to, 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.

The level of supervision is likely to vary for each employer, with the level of autonomy varying by size of organisation and marketing function. Typically, they would be the first point of contact for day-to-day activities in the marketing function, and supervised by a member of staff with greater marketing skills, knowledge and experience.

### **Typical job titles include:**

Marketing assistant, Marketing communications assistant, Marketing campaigns assistant, Brand assistant, Promotional assistant.

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## Marketing Executive Level 4 Apprenticeship Standard

### **Overview**

The Marketing Executive typically reports to a Marketing Manager and helps to shape, support and deliver marketing plans, working in conjunction with the Marketing Manager who will define the overall marketing strategy. A highly audience focused role which requires creativity, communication and project management skills, responsible for planning and executing tactical and targeted marketing activity.

### **Typical job titles**

Marketing Executive, Marketing Officer, Marketing and Communications Officer, Marketing Specialist, Communications Executive, Communications Specialist.

### **Typical responsibilities**

- Managing and maintaining key marketing channels, including digital, offline and social media
- Planning and delivering tactical integrated marketing campaigns
- Managing the production and distribution of marketing materials
- Liaising and networking with a range of stakeholders including customers, colleagues, suppliers (incl. agencies) and partner organisations
- Collecting and analysing research information to understand target audience behaviour and views across the market in general and the marketing mix
- Assisting in the achievement of brand positioning to agreed guidelines
- Organising and attending events such as conferences, seminars, receptions and exhibitions.

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## Marketing Manager Level 6 Apprenticeship Standard

### Overview

A Marketing Manager is responsible for the marketing activities and strategy of their organisation. From overseeing the marketing budget, planning and implementing campaigns to tracking their success and reporting back to senior management. They have a strategic focus, ensuring that marketing activities align to brand guidelines and shape business needs and objectives and deliver a return on investment. A Marketing Manager will develop, position and promote the products or services of the company, selecting appropriate channels and using appropriate messaging. Being a Marketing Manager requires in-depth experience of marketing as well as great communication skills, high levels of creativity and the confidence to manage a team of Marketing Executives/Marketing Assistants.

### Typical job titles

Marketing Manager, Marketing and Communications Manager, Corporate Communications Manager, Product/Proposition Manager, Insight/Innovations Manager.

### Typical responsibilities

- Developing and implementing the operational marketing strategy, key marketing campaigns and stakeholder engagement plans to deliver against key business objectives
- Delivering data and evidence driven decision making through commissioning reliable research to inform marketing strategies
- Tracking and reporting on marketing/sales data to inform senior management decision making
- Establishing marketing goals based on campaign analysis, product/service performance and market forecasts
- Managing the marketing budget to develop cost-effective marketing plans
- Approves and oversees the creative development of a range of marketing materials/channels
- Manages relationships with key stakeholders to support marketing delivery and corporate reputation, this may include briefing and managing external agencies or specialist marketing teams (e.g. digital) internally

## Appendix B

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**Detailed Mapping of CIM Qualifications to  
Apprenticeship Standards Knowledge and Skills**

Level 3 Marketing Assistant Apprenticeship Standards Requirements			CIM Syllabus 2014 Modules	CIM Syllabus 2019 Modules
			Marketing Principles (2014)	Marketing Principles (2019)
Knowledge	Ref	The Marketing Assistant requires an understanding of:		
	K1	Marketing theory, concepts and basic principles e.g., what marketing is, the marketing mix (7Ps: product, price, place, promotion, physical environment, process, people), the promotional mix and the difference between its elements (advertising, sales, public relations etc), what a marketing plan is.	1.1, 1.2, 3.2, 3.4, 5.1, 5.2,	1.1, 1.2, 5.1
	K2	Current technologies such as systems and software, that can help deliver effective marketing planning (research), delivery and evaluation	4.1, 4.2, 4.3	4.1, 4.2
	K3	Legislation and regulatory frameworks affecting marketing operations, e.g. General Data Protection Regulation (GDPR)/eprivacy, trading laws, copyright law, Advertising Standards Authority (ASA)	3.1	3.1
	K4	Principles of Marketing ethics such as targeting vulnerable adults and children; principles of conducting marketing communications in a legal, decent and honest manner, advertising being clearly differentiated from news/entertainment, ensuring consumer data is never compromised and marketing strategies avoid stereotyping	4.1, 4.2, 4.3	4.1, 4.2
	K5	The Internal dependencies that positively and negatively influence the success of marketing, e.g. IT, finance, sales, operations	1.3, 3.3	1.2, 3.1
	K6	Primary and secondary research and the different sources of primary and secondary research data	4.1, 4.2, 4.3, 4.4	4.1, 4.2
	K7	Brand theory (positioning/value/identity/guidelines) to a basic level	5.3	5.2
	K8	How marketing fits within organisational structures and processes	1.3	1.2
	K9	How to brief and manage external marketing suppliers, and an understanding of the risks to ineffective briefing/management	1.1	1.1
	K10	Copywriting and proofreading techniques		
	K11	Search engine optimisation techniques and effective video production and publishing practice		
	K12	The benefits of a customer relationship management system		
	K13	The benefits of marketing automation processes and systems	3.3	3.1
	K14	The metrics relevant to the delivery and evaluation of marketing activity, and an understanding of which are most relevant to that activity		
	K15	Budgeting principles and good procurement practice		
	K16	Importance of planning and maintaining offline and digital assets		
	K17	Awareness of social media platforms appropriate to customer and business segments	4.3	4.2
	K18	The customer journey and the customer segments relevant to their market		5.2

Level 3 Marketing Assistant Apprenticeship Standards Requirements			CIM Syllabus 2014 Modules	CIM Syllabus 2019 Modules
			Marketing Principles (2014)	Marketing Principles (2019)
Skills	Ref	The Marketing Assistant is able to:		
	S1	Use research/survey software to gather audience insight and/or evaluation	4.2	4.1, 4.2
	S2	Applying creativity to use a website content management system to publish text, images and video/animated content		
	S3	Use a social media platform to publish text, images and video content		
	S4	Use high volume email delivery software to acquire and/or retain one or more market segments and understand the response		
	S5	Organise offline and digital assets in a coordinated and legally compliant way (there may be several pieces of legislation that a Marketing Assistant may need to comply with, these should be relevant to the sector they work in and the type of activity. Examples include GDPR; Consumer Protection from Unfair Trading Regulations 2008; Consumer Credit act; Copyright, Designs and Patents act)		
	S6	Able to compile briefs for an external marketing supplier (e.g. printer/display stand producer/graphic designer etc) and oversee successful delivery in-line with specification	1.1	1.1
	S7	Write persuasive text to meet a marketing communications objective, using common copywriting techniques such as adapting writing style to ensure it is appropriate to different channels in-line with organisational brand guidelines.		
	S8	Proofread marketing copy to ensure that it is accurate, persuasive and legally compliant and is on brand		
	S9	Able to plan and coordinate a marketing activity (external and/or internal) comprising several different marketing tactics to acquire or retain one or more customer segments. Carries out the tasks within known resources	5.1, 5.2, 5.3, 5.4, 3.3, 3.4	5.1, 5.2, 3.1, 3.2
	S10	Analyse and present defined external and internal marketing data to inform discussions about planning, delivery and/or evaluation of marketing activities/brand performance		
	S11	Spreadsheets - create and maintain spreadsheets using common business software, e.g. Excel, Numbers, in support of marketing activities (such as project/budget planning and monitoring, and to support organisation of marketing assets)		
	S12	Presentations - compile and present marketing information (e.g. to inform internal stakeholders of the results of a marketing tactic or present ideas for future marketing tactics) using common business software, e.g. PowerPoint. Basic presentation skills to deliver these findings		
	S13	Compile a report from a marketing system/software, e.g. CRM, Google Analytics, Dotmailer		

Level 4 Marketing Executive Apprenticeship Standards Requirements			CIM Syllabus 2014 Modules		CIM Syllabus 2019 Modules	
			Marketing	Integrated Communications	Applied Marketing	Planning Campaigns
Knowledge	Ref	The Marketing Executive requires an understanding of:				
Marketing Concepts & Theories	K1	The fundamentals of marketing theory that support the marketing process e.g. the extended marketing mix (7P'S: Product, Price, Place, Promotion, Physical environment, Process, People), product development, and segmentation.	1,1,4,2,5,3,1,3,2,5,1		1,1,5,1,2,1	
	K2	The concepts of brand positioning and management and implementing process to support corporate reputation.	2,5	4,1,4,2,4,3,4,4,4,5	1,2,5,1	
	K3	The principles of stakeholder management and customer relationship management (CRM), both internal and external, to facilitate effective cross-functional relationships internally, and channel and customer relationships externally.	1,3,2,1,2,2,3,2,4,3,3	1,1,1,2,1,3	1,2,3,2	1,3,4,2,4,1
Business understanding and Commercial Awareness	K4	The characteristics and plans of the business and sector they work within, including their vision and values.	1,2,3,4		1,2,5,1	
	K5	How marketing contributes to achieving wider business objectives.	1,2,1,3,3,4		1,2,3,1,3,2	
	K6	The target audience's decision-making process and how that can influence marketing activities.	2,1,2,2,2,3,2,4		2,1,2,2,2,3	
	K7	The sector specific legal, regulatory and compliance frameworks within which they must work, including current Data Protection regulations.	4,3,3,4		3,1	
Market Research	K8	The principles of effective market research and how this can influence marketing activity e.g. valid data collection sources and methodologies and usage, including digital sources, and when to use quantitative and qualitative methods.	4,1,4,2,4,3,4,4		4,1,4,2,4,3	
Products and Channels	K9	Basic principles of product development and product/service portfolios.	4,4	4,1	1,1	
	K10	The marketing landscape and how routes to market interplay most efficiently, e.g. franchise model, distribution.	2,3,2,4		3,2,3,3	
	K11	The features and benefits of different marketing communications channels and media, both digital and offline, and when and how to apply these.		3,1		3,3
Skills		The Marketing Executive is able to:				
Marketing Campaigns	S1	Coordinate and maintain key marketing channels (both digital and offline).	5,3	6,2,6,3	6,1,6,2	
	S2	Plan and deliver tactical campaigns against SMART (Specific, Measurable, Achievable, Realistic, Time-bound) objectives.	5,1,5,2,6,1	3,1,5,1		1,1,3,1,2,3
	S3	Manage the production and distribution of marketing materials, e.g. digital, print and video content as appropriate.		3,3,3,4		4,1,4,2
Interpersonal and Communications Skills	S4	Produce a wide range of creative and effective communications, including ability to write and proofread clear and innovative copy, project briefs, and give confident presentations.		5,1,5,2		1,2
	S5	Able to engage and collaborate with a wide range of clients/stakeholders, across departments internally and with clients/suppliers externally to support marketing outcomes as required.	3,2,3,3	1,1,1,3,2,1	3,1,3,2	3,2,4,1
Service Delivery	S6	Use good project and time management to deliver projects/tasks/events as appropriate, effectively. Including the ability to divide time effectively between reporting, planning and delivery.				4,1,6,2
	S7	Coordinate several marketing campaigns/projects/events to agreed deadlines.				4,2,4,1
	S8	Effectively liaise with, and manage, internal and external stakeholders including suppliers to deliver required outcomes.	3,3,1,3	3,2,3,4		1,2,1,3
Budget Management	S9	Monitor project budgets within their scope of work using appropriate systems and controls.	6,4			6,1
Evaluation and Analysis	S10	Evaluate the effectiveness of marketing campaigns by choosing the appropriate digital and offline data sources.	6,4	6,1,6,2	4,3	4,1
	S11	Assimilate and analyse data and information from a range of sources to support marketing activities.	4,1,4,2,4,3,4,4		4,3	
	S12	Evaluate data and research findings to derive insights to support improvements to future campaigns.	4,4		4,3	6,2
Systems and Processes	S13	Effectively use appropriate business systems and software to deliver marketing outcomes efficiently, for example to analyse data, produce reports and deliver copy.				5,1
	S14	Use appropriate technologies to deliver marketing outcomes e.g. digital/web analytics, social media, CRM.			2,1,4,1	

Level 6 Marketing Manager Apprenticeship Standards Requirements			CIM Syllabus 2014 Modules		CIM Syllabus 2019 Modules	
			Strategic Marketing	Mastering Metrics	Marketing & Digital Strategy	Innovation in Marketing
Knowledge	Ref	The Marketing Manager requires an understanding of:				
<b>Marketing Concepts &amp; Theories</b>	K1	The principles and theories of marketing that support the strategic marketing process, e.g. the extended marketing mix (7P'S: Product, Price, Place, Promotion, Physical environment, Process, People), marketing management processes, product development and how to apply and align these to the business plan and strategic objectives.	1.1,2.1,4.1,4.2		1.1,4.3	1.1,1.2
	K2	Brand development and safeguarding, including the analysis and planning of how a brand is perceived in the market, value propositions and delivery of tangible elements such as product pricing, packaging etc.	4.2		1.1, 4.1, 6.1	
	K3	Consumer and organisational behaviour theories and concepts, including the customer (business 2 business/consumer) decision making process and how that influences marketing strategy.	12,3,2		2.2,3.2	3.3
	K4	Advanced stakeholder management and the application of customer relationship management (CRM), both internal and external, to facilitate the delivery of marketing plans.	4.3		4.2,2.2,5.2	3.3
	K5	Marketing Communication planning models and budgetary methodologies.	4.4		4.3	6.1
<b>Business understanding and Commercial Awareness</b>	K6	Their organisation's vision, mission, values, strategy, plans, stakeholders, customers and competitors to support the decision and planning process.	3.2		1.1,2.1,3.1	
	K7	The wider business perspective in which marketing operates nationally and internationally, including the influences of the internal and external market/sector, the opportunities, challenges and issues it faces, and how marketing can address these.	1,3,2,1		1,2,2.1	1.1,1.3
	K8	How to measure and deliver Return on Investment in relation to marketing activities and plans.	2.2	1,2,3,2	4,2,6.1	3,2,6.2
	K9	The relevant industry/sector specific legal, regulatory and compliance frameworks within which they must work, including current Data Protection regulations.	1.1		1.2	
<b>Research &amp; Insight</b>	K10	Effective market research and evaluation techniques and methods and how to use the results to inform marketing planning and activities.	3.1,3.2,3.4	2.1,2.3	2.1,2.2	
	K11	Reliable information sources and how to use these to deliver measurable improvements to marketing activities, including how metrics are used to measure these.	3.1	2,2,2.3	2.2	
	K12	New and emerging trends and themes in marketing.	1.3,3.1			1.1,1.3
<b>Product and Service Development</b>	K13	The principles of product and service design and implementation and portfolio management.	4.2	3.2	4.1,3.2,4.3	2.2
	K14	The features and benefits of different marketing communications, and routes to market, and how to leverage these to maximum effect, including the use of appropriate digital channels and systems.	4.4		4.3	



Level 6 Marketing Manager Apprenticeship Standards Requirements:			CIM Syllabus 2014 Modules		CIM Syllabus 2019 Modules	
			Strategic Marketing	Mastering Metrics	Marketing & Digital Strategy	Innovation in Marketing
Skills	Ref	The Marketing Manager is able to:				
Marketing Strategy	S1	Lead and implement a clear marketing plan and strategy, linked to business requirements to sustain a marketing advantage.	5.1, 5.2, 4.3		4.1,4.2,4.3	4.3,5.1
	S2	Develop effective marketing campaigns and channels, assessing their features and benefits to best meet business requirements and customer needs.	4.4	3.1	2.2,3.1,4.3	
	S3	Develop detailed integrated marketing plans for all products/ services using offline and digital media tools - works with marketing team/ specialist agencies to do this.	4.3,4.4		4.3	
Advanced Interpersonal and Communication Skills	S4	Influence, negotiate and persuade at senior level collaborating with a wide range of stakeholders internally and externally to gain support/backing for marketing delivery.	3.4,4.3,4.4	4.1	5.1,6.1	4.3
	S5	Act as a consultant, providing professional marketing advice to stakeholders around the business or to external clients as relevant.	6.2,6.3		6.1,6.2	5.1,5.2,6.1
	S6	Present complex information in an understandable and stimulating way whether through effective verbal presentation or creative written copy.	4.3,4.4	4.3	2.2	
Service Delivery and improvement	S7	Oversee, manage and approve key marketing activities/projects.	6.1		6.2	6.1
	S8	Deliver measurable marketing outcomes against key performance indicators and identify and drive continuous improvement, challenging existing processes and procedures where needed.	6.1,6.2,6.3		6.1	6.2
Resource Management	S9	Effectively plan and manage the marketing budget, to deliver on strategic objectives, and evaluate and justify return on marketing investment.	5.2,6.1		5.2,6.1	
	S10	Effectively engage, negotiate and manage third party suppliers and internal stakeholders.	3.3		5.2	3.3
Planning & Analysing	S11	Effectively evaluate marketing activities using measurement data and analytics to identify relevant key performance indicators (KPI) and return on marketing investment (ROI) to meet business objectives.	5.2,6.1	4.1	2.2,6.1	4.2
	S12	Assimilate and analyse complex data and information from a range of sources to evolve, lead and plan marketing activities.	3.1,3.2		2.1,2.2	
Commercial Approach	S13	Seek out opportunities to increase income generation and gain new business e.g. new products, markets and services as relevant.	1.1, 2.1, 2.3			1.2,2.2
	S14	Construct a robust business case in support of marketing activities/plans.	4.2,4.3		4.1,4.2	4.3
	S15	Effectively manage and develop stakeholder relationships at senior level.	3.4,4.3,4.4		5.2	
	S16	Assess business risks and reputational impacts of marketing activities.	4.3.5.3		4.2	4.2
Leadership	S17	Inspire and motivate internally and externally to deliver marketing plans effectively, acting as a role-model for marketing best practice and taking responsibility for improving their own and the team's and/or stakeholder performance, as relevant.			5.2,6.2	2.2,3.3
Systems and Processes	S18	Effectively use appropriate business systems and software to deliver marketing outcomes efficiently, for example to analyse data, inform search engine marketing, produce reports and deliver copy.		5.3	2.2,4.2	6.2
	S19	Actively interrogate systems and information sources to make judgements on when to introduce new ways of working/ identify new systems/processes to improve marketing activities or address those new requirements and /or marketing trends.		5.3	2.2	6.2