



CIM

The Chartered  
Institute of Marketing

A complete guide to

# End-Point Assessment

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 End-Point Assessment (EPA) and explains the processes and support when using The Chartered Institute of Marketing (CIM) as the End-Point Assessment Organisation (EPAO).

Stakeholders should refer to **The Chartered Institute of Marketing Apprenticeship Guide**, for further detail and guidance relating to the apprenticeship programme itself.

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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 following standards:

- **Marketing Assistant Level 3 Apprenticeship Standard**
- **Marketing Executive Level 4 Apprenticeship Standard**
- **Marketing Manager Level 6 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 standard of EPA.
- 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.
- Excellence in customer service and support during registration and all stages of the EPA.
- Access to CIM's EPA Toolkit with a range of templates to help prepare Apprentices for their EPA and maximise their chances of success.

## 3

## The Marketing 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 as defined by the Apprenticeship Standards.

EPA for the Marketing Standards for Level 3 is undertaken over a maximum period of six months and a maximum period of seven months for Level 4 and Level 6 to cover the assessment methods that are shown below.

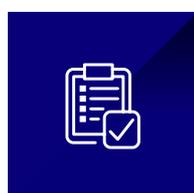
Assessment Method	Marketing Apprenticeship Standards		
	Marketing Assistant Level 3	Marketing Executive Level 4	Marketing Manager Level 6
Multiple Choice Test (MCT)	✓	✓	✗
Project Showcase Report	✓	✓	✓
Project Showcase, Presentation, Q&A	✗	✓	✓
Professional Discussion	✓	✓	✓
Grading	Fail, Pass, Merit, Distinction		

## 4

## CIM support for EPA

CIM have developed a range of support for Apprentices to help prepare for EPA. Toolkits are made available to Apprentices upon registration for EPA.

### EPA Toolkit



#### CIM EPA Gateway Checklist



#### Project Plan Submission Form



#### Templates

Project Report Template

Presentation Template

Preparation for Q&A



#### Mock Questions

Multiple Choice Knowledge Questions

Project Showcase Q&A

Professional Discussion

## 5

# The Apprenticeship Journey and EPA Guidance

The Marketing 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.

## 5.1

## Apprenticeship Learning Programme

### with an Apprenticeship Training Provider

#### 5.1a – Booking EPA with CIM:

- Registration for EPA: 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 point of registration a deposit of £30 will be payable, the balance of payment will be taken once a Gateway booking has been confirmed.
- 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. Gateway bookings must be confirmed **at least six weeks in advance** of required Gateway date.

- Submission Documentation: 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 Checklist
  - CIM Project Plan Submission Form
  - Evidence of Level 2 Maths and English (e.g. certificates of achievement)
- Gateway Approval: A CIM Independent Assessor (IA) will review the project plan summary, and if approved, 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 Gateway Checklist which will be returned to the Employer/Apprenticeship Training Provider.

- Normally all EPA elements will be undertaken remotely, however where the Employer is keen for their Apprentice to undertake any element of EPA on their site, CIM will approve the Employer's premises to assess its suitability for the requirements of EPA and ensure the CIM Invigilation conditions can be met.

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

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### 5.1b – Deciding and agreeing the Work Based Project for the Project Showcase:

- Apprentices agree with their Employer, in consultation with their Apprenticeship Training Provider, a work based project for their Project Showcase. 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.
- A **350-word Project Plan** must be submitted to CIM for approval. The Project Plan will need to demonstrate how the Apprentice can demonstrate the knowledge, skills and behaviours as defined by the Assessment Plan. A template is provided.
- Apprentices who have studied for CIM qualifications during their apprenticeship may have already undertaken assessment based on a work based project. The CIM qualification assessments 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 the project could be used by the Apprentice for the Project Showcase, Q&A and Professional Discussion at EPA. There is still a requirement that a Gateway Checklist and Project Plan Submission Form is completed for all Apprentices.

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### 5.1c – Reasonable Adjustments:

- Reasonable Adjustments are adjustments that are made to the method of assessment for a qualification to enable disabled or disadvantaged Learners to demonstrate his or her knowledge, skills and understanding to the level required by the specification for that qualification.
- CIM Reasonable Adjustments Policy will apply to any EPA and requests for reasonable adjustments must be made a minimum of 20 working days prior to an End-Point Assessment. The policy is available from [apprenticeships@cim.co.uk](mailto:apprenticeships@cim.co.uk)

## 5.2

# Gateway

## 5.2a - Gateway Submission:

The Apprenticeship Training Provider/Employer will submit to CIM the following documentation at Gateway:

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

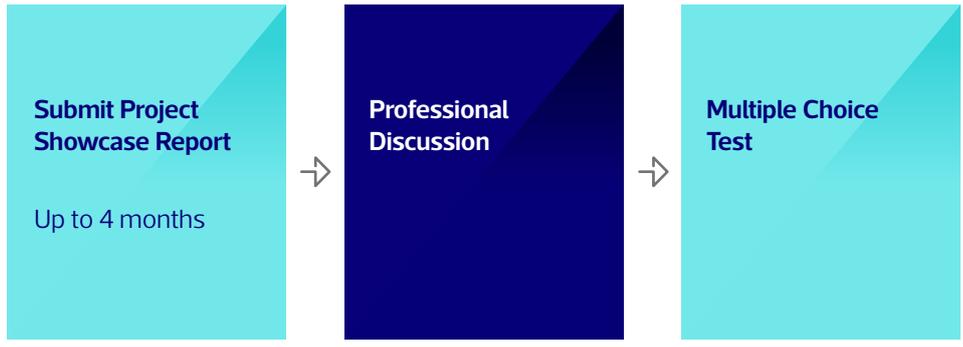
## 5.2b - Gateway Approval:

- CIM provide notification of acceptance for the Apprentice to proceed to EPA within seven working days of submission provided approval.
- 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 six months for Level 3 and a maximum of seven months for Level 4 & Level 6 from date of confirmation.
- A member of the CIM EPAO team will contact the Apprenticeship Training Provider/Employer within seven working days of Gateway submission to agree dates for the EPA elements:
  - Online Multiple Choice Test (Level 3 & Level 4 only)
  - Deadline for submission of the Project Showcase Report
  - Date for Project Showcase Presentation and Q&A (Level 4 & Level 6 only)
  - Date for Professional Discussion
- EPA dates will be recorded on the Gateway Checklist that will be returned to the Employer and Apprenticeship Training Provider. 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.

5.3

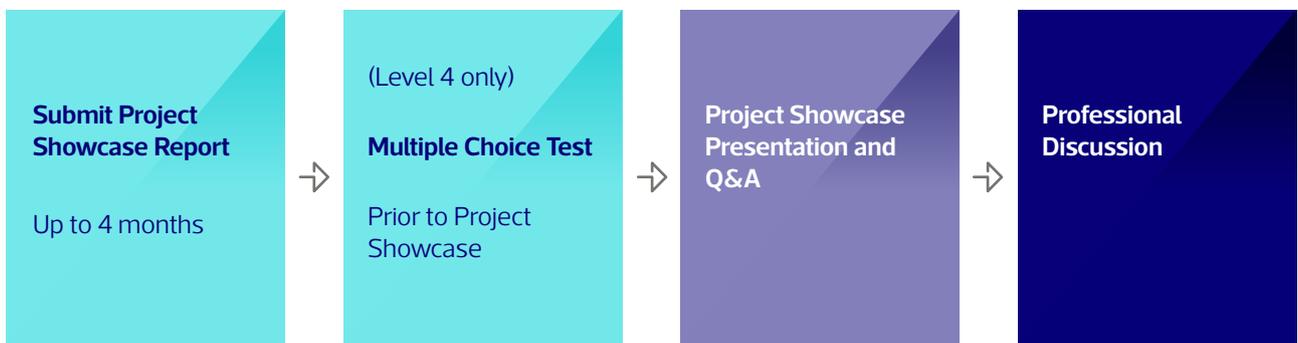
# EPA Period

6 months from 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 Gateway approval (Level 4 & Level 6)



### 5.3a – Submission and Assessment of Project Showcase Report

The Project Showcase Report will be based on the Work Based Project agreed between the Employer and the Apprentice at the start of the apprenticeship programme. Apprenticeship Training Providers will support Employers and Apprentices in selecting an appropriate project for the Project Showcase. Apprentices should:

- Complete their Project Showcase Report using the CIM template, within four months of notification of the start of the EPA process (i.e. Gateway approval).
- Submit Project Showcase Report to CIM at least four weeks prior to the end of month five of the EPA period and prior to the Presentation and Q&A (Level 4 & 6). For Level 3, it should be submitted prior to the Professional Discussion.
- Present Project Showcase Report in business report style format.
- Not exceed the following word counts
  - 3,500 words for Marketing Assistant Level 3
  - 3,500 words for Marketing Executive Level 4
  - 4,000 words for Marketing Manager Level 6
- For the Marketing Executive and Marketing Manager, include a minimum of eight and maximum of ten appendices to provide evidence of how the project was delivered and outcomes achieved e.g. stakeholder feedback, marketing materials, data.

- For the Marketing Assistant, include: A presentation pack (8-10 slides) as a brief on the project to the internal audience. Include appendices which provide evidence of how the project was delivered and the outcomes achieved. A summary of how the project maps to the KSB's relevant to this assessment method. See End Point Assessment Plan for more information
- Include a Statement of Authenticity outlining the Apprentice's contribution and signed by the Apprentice and the Employer. A Project Report Template can be found as part of the CIM Toolkit.

The Project Showcase Report will be assessed by a CIM IA and results will be recorded on a mark sheet developed by CIM. Results will be made available to Employers, the Apprentice and the Apprenticeship Training Provider within ten working days from receipt by CIM.

At Level 4 & Level 6 an Apprentice may not proceed to the Project Showcase Presentation, Q&A or the Professional Discussion unless a pass has been achieved. Note: for the Marketing Executive Level 4 it is also a requirement that the Multiple Choice Test is achieved prior to the Project Showcase Presentation and Professional Discussion. For Level 3, an Apprentice may not proceed to the Professional Discussion unless a pass has been achieved.

### 5.3b – Multiple Choice Knowledge Test (MCT) – Marketing Assistant Level 3

The Multiple Choice Knowledge Test (MCT) does not need to be completed before the Work Based Project is started. However, it is suggested that the MCT is taken early in the EPA period.

The structure of the MCT is:

- 40 Multiple Choice Questions (10 questions to be based on two given scenarios)
- 1 mark per question – 40 marks
- Duration 90-minutes

The given scenarios will be up to 150 words long based on a true to life marketing scenario. For example, a new product launch.

The MCT must be taken under exam conditions and Apprentices cannot refer to any books or materials during the examination. Invigilation will normally be undertaken by a CIM Accredited Study Centre, however CIM may also approve alternative venues such as the Apprentices place of work or home if remote proctoring is available, provided the CIM examination centre requirements can be met. Employers and/or Apprenticeship Training Providers should contact the CIM EPA Team prior to any assessment to seek approval.

Results for the MCT will be made available to Employers, the Apprentice and the Apprenticeship Training Provider within 10 working days from the date of the test.

### 5.3c – Multiple Choice Knowledge Test (MCT) – Marketing Executive Level 4

The MCT should be taken after the submission and approval of the project plan and the MCT must be passed prior to the Project Showcase (i.e. Presentation with Q&A) and Professional Discussion.

The structure of the MCT is:

- 50 Multiple Choice Questions
- 1 mark per question – 50 marks
- Duration 90-minutes

The MCT must be taken under exam conditions and Apprentices cannot refer to any books or materials

during the examination. Invigilation will normally be undertaken by a CIM Accredited Study Centre, however CIM may also approve alternative venues such as the Apprentice's place of work or home if remote proctoring is available, provided the CIM examination centre requirements can be met. Employers and/or Apprenticeship Training Providers should contact the CIM EPA Team prior to any assessment to seek approval.

Results for the MCT will be made available to Employers, the Apprentice and the Apprenticeship Training Provider within ten working days from the date of the test.

### 5.3d – Project Showcase Presentation & Q&A – Marketing Executive Level 4 and Marketing Manager Level 6 only

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

- Presentation will be made to the CIM IA, to give an evaluation of their work and progress during the work based project. The Apprentice should provide examples of how they developed a marketing skill and reflect on how they will change their future performance-based learnings from undertaking the project.
- Presentation Duration:
  - 10-minutes for Marketing Executive Level 4
  - 20-minutes for Marketing Manager Level 6
- Q&A with a CIM IA who will ask questions based on the content of the Project Showcase Report and the Presentation, as well as, exploring any required knowledge, skills or behaviours that have not yet been demonstrated. Follow-up questions may be asked to provide Apprentices with the opportunity to enhance their answers.

• Q&A duration:

- 20-minutes/5-7 Questions for Marketing Executive Level 4
- 30-minutes/10-12 Questions for Marketing Manager Level 6

CIM will provide PowerPoint templates for the Presentation to enable Apprentices to ensure their presentation addresses all the required criteria, however 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.

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 Project Showcase Presentation and Q&A for Level 4 and Level 6 will be recorded for assessment quality assurance purposes.

### 5.3e – Professional Discussion – Marketing Assistant Level 3 only

The Apprentice will undertake a Professional Discussion with a CIM IA.

The duration of the Professional Discussion will be:

- 60-minutes/typically a minimum of 10 open questions based on the KSBs as outlined in the assessment plan

The Professional Discussion will allow validation of work delivered, discussion of any areas of the Work Based Project highlighted by the independent assessor during the review of the project report as needing further investigation/testing, and seek to explore any KSBs mapped to this assessment method that are yet to be evidenced.

Please note that the Professional Discussion for Level 3 will be recorded for assessment quality assurance purposes.

### 5.3f – Professional Discussion – Marketing Executive Level 4 and Marketing Manager Level 6 only

The Apprentice will undertake a Professional Discussion with the CIM IA immediately after the Presentation/Q&A:

The duration of the Professional Discussion will be:

- 50-minutes/typically 4 competency and 4 scenario-based questions for Marketing Executive Level 4
- 70-minutes/typically 5 competency and 5 scenario-based questions for Marketing Manager Level 6

A series of questions will be asked including:

- Competency questions that will focus on how the Apprentice demonstrates their skill in a particular area.

- Scenario questions that will ask the Apprentice to respond to a scenario or explain how they would deal with a particular situation.

- Follow-up questions that may be asked to provide Apprentices with the opportunity to enhance their answers.

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 for Level 4 and Level 6 will be recorded for assessment quality assurance purposes.

### 5.3g – 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 all 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 the apprentice is competent in all criteria of the standards. Grading is calculated as per the following tables:

Apprenticeship Standard Grading Rules – Marketing Assistant Level 3		
Knowledge Test Grade	Project Showcase Grade	Overall Grade
Fail in one or both methods		
Pass	Pass	Pass
Distinction	Pass	Pass
Pass	Distinction	Merit
Distinction	Distinction	Distinction

Apprenticeship Standard Grading Rules – Marketing Executive Level 4			
MCT	Project Showcase (Report, Presentation, Q&A)	Professional Discussion	Overall Grade
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

### Apprenticeship Standard Grading Rules – Marketing Manager Level 6

Project Showcase	Professional Discussion	Overall Grade
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Merit
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. At each stage of the process, results will be moderated

by the CIM Lead Verifier prior to being released to the apprentice, and when all elements are complete the final grade calculated.

#### 5.3h - Results

- Results for each element of the EPA will be made available to the Apprentice, Employer and Apprenticeship Training Provider ten working days from the date of the EPA element, following internal quality assurance and moderation.
- The final grade for the apprenticeship will be based on the performance across all elements as follows:

Grade Awarded	Apprentices must achieve:		
	Level 3	Level 4	Level 6
Pass	Pass in both elements of the EPA	Pass in all three elements of the EPA	Pass in both elements of the EPA
Merit	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
Distinction	Distinction in both elements of the EPA	Distinction in all elements of the EPA	Distinction in both elements of the EPA

- Final overall results and grading for each EPA element for the Apprentice 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.

### 5.3i - Resits/Retakes

If the Apprentice fails any element, it is the Employer's decision as to whether the Apprentice may resit, it is recommended that Employers consult with their Apprenticeship Training Provider. For Level 3, the EPA period must not exceed six months. For Level 4 and Level 6, 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. Employers should consult with their Apprenticeship Training Provider 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.

All resits/retakes are subject to an additional cost depending on the assessment element. Please note that resits/retakes are ineligible costs and are not funded by the ESFA. Resits/retakes assessment costs are the responsibility of the Employer. Full details on this can be found at <https://www.gov.uk/guidance/apprenticeship-gateway-and-resits-for-end-point-assessment-epa>

For resits/retakes assessment costs please email [apprenticeships@cim.co.uk](mailto:apprenticeships@cim.co.uk)

## 6

# Progression

Apprentices who have achieved a Marketing Apprenticeship will have the opportunity to apply for membership of CIM. 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.

## 7

# 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*** and funding will stop.

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

## 8

## 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 from [apprenticeships@cim.co.uk](mailto:apprenticeships@cim.co.uk).

### 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](mailto:apprenticeships@cim.co.uk)

## 9

## 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 from [apprenticeships@cim.co.uk](mailto:apprenticeships@cim.co.uk)