Toolkit

MULTI-CHANNEL MARKETER
Level 3

dsw

end-point assessment and so much more

INTRODUCTION

DSW is your end-point assessment organisation for this apprenticeship. We have created this toolkit to help the apprentice, training provider and the employer to understand what is needed to successfully complete end-point assessment (EPA) for this standard.

All approved end-point assessment organisations must carry out EPA in line with the assessment plan published by the Institute for Apprenticeships and Technical Education (IfATE). The assessment plan details the assessment methods used, the criteria to be assessed and the environment in which the assessments must take place.

The requirements and content of this toolkit come directly from the Multi-Channel Marketer assessment plan with additional clarification provided by the external quality assurer (EQA) for this apprenticeship standard. Published assessment plans are available on the IfATE website: https://www.instituteforapprenticeships.org/

Typical job titles of those undertaking this apprenticeship include Digital Communications Assistant, Digital Marketing Assistant, Marketing Administrator, Marketing Assistant Marketing, Communications Assistant, Marketing Junior, Social Media Assistant.

The standard aligns with recognition by Chartered Institute of Marketing (CIM) for Affiliate, Digital Marketing Institute (DMI) for Power, Data and Marketing Association (DMA) for Individual.

CONTENTS

GATEWAY

Apprentices must be on-programme for a minimum of 12 months before they come through gateway and enter the EPA phase of the apprenticeship. The apprentice, employer and training provider must agree that the apprentice is demonstrating competence against the standard's knowledge, skills, and behaviours (KSBs) and the associated grading descriptors.

Once an apprentice is ready for gateway, the training provider must submit the following to DSW's epaPRO portal for approval:

- gateway declaration
- proof of Level 2 English and maths *
- project Title and Scope Template
- portfolio of evidence with completed referencing table

*DfE exemptions apply

If any of these requirements are not met, gateway will not be approved.

EPA OVERVIEW

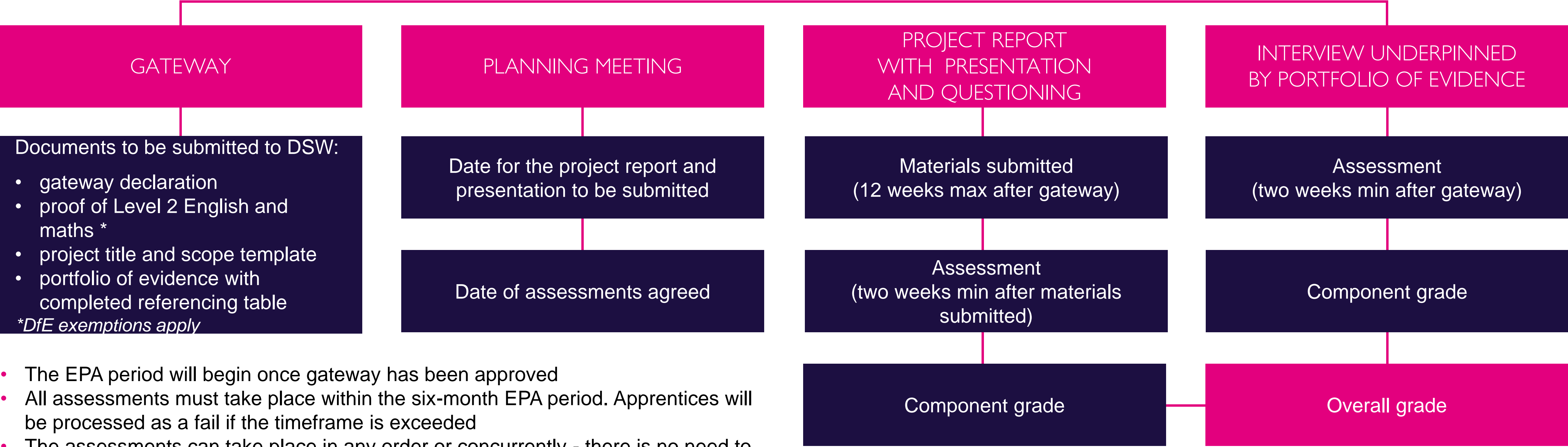The Multi-Channel Marketer EPA consists of two assessment methods:

- Project Report with Presentation and Questioning
- Interview underpinned by Portfolio of Evidence

The standard is made up of 29 grading descriptors. There are 21 pass descriptors which all apprentices must meet. There are eight distinction descriptors which apprentices aiming for an overall grade of distinction must also meet.

EPA TIMELINE

6 months max duration

GATEWAY	PLANNING MEETING	PROJECT REPORT WITH PRESENTATION AND QUESTIONING	INTERVIEW UNDERPINNED BY PORTFOLIO OF EVIDENCE

Documents to be submitted to DSW:
- gateway declaration
- proof of Level 2 English and maths *
- project title and scope template
- portfolio of evidence with completed referencing table

DfE exemptions apply

Planning Meeting:

Date for the project report and presentation to be submitted

Date of assessments agreed

Project Report:

Materials submitted (12 weeks max after gateway)

Assessment (two weeks min after materials submitted)

Component grade

Interview:

Assessment (two weeks min after gateway)

Component grade

Overall grade

- The EPA period will begin once gateway has been approved
- All assessments must take place within the six-month EPA period. Apprentices will be processed as a fail if the timeframe is exceeded
- The assessments can take place in any order or concurrently - there is no need to pass one assessment before progressing to the other
- The assessments may take place on the same day or on different days

PLANNING MEETING

Following gateway approval, DSW's independent end-point assessor (IEPA) will contact the training provider to introduce themselves and arrange a planning meeting. Apprentices and employers are permitted to join the planning meeting if they request to do so.

This meeting will be used to agree the dates and times for the assessments.

The assessments will be conducted virtually via the online video conferencing platform Microsoft Teams. Others, such as Webex or Zoom can be used if preferred.

Face-to-face assessments can be accommodated should the apprentice prefer. This should be discussed with the training provider and agreed with DSW. Additional costs will apply.

The IEPA will record the agreed submission and assessment dates in epaPRO once the planning meeting is complete.

ASSESSMENT CONDITIONS

All assessments must be taken under examination conditions. It is essential that apprentices familiarise themselves with the *Conditions for Live Assessment* The document sets out the mandatory requirements to ensure a secure and appropriate assessment environment, including apprentice ID requirements, panning of rooms and appropriate use of technology.

Failure to comply with the conditions for live assessment may result in delayed, cancelled or failed assessments.

CRITERIA AMPLIFICATION AND MAPPING

This document outlines what the apprentice will be assessed against in each assessment method.

During the on-programme period, the apprentice will cover the knowledge, skills, and behaviours (KSBs) of the apprenticeship standard. The apprentice is not assessed against the KSBs; these have been used to create the pass and distinction criteria.

The apprentice's competence will be assessed against the pass (P) and distinction (D) criteria during end-point assessment.

Amplifications are written to expand on the pass and distinction criteria. This simplifies and clarifies any complex, vague and/or ambiguous areas. Where examples have been listed, these are designed to provide guidance to the apprentice. The list is not exhaustive, and the apprentice may use alternative examples that are relevant to their role.

PROJECT REPORT WITH PRESENTATION AND QUESTIONING

The project involves the apprentice completing a significant and defined piece of work that has a real business application and benefit. The project must meet the needs of the employer's business and be relevant to the apprentice's occupation and apprenticeship.

The apprentice has a maximum of 12 weeks in which to undertake their project and submit their project report, presentation materials and referencing table to DSW.

The 12-week period commences as soon as gateway has been approved. Starting the work ahead of this will invalidate the assessment.

PROJECT TITLE AND SCOPE

Employers must agree on a project title with the apprentice. They should ensure that it meets the needs of the business, is relevant to the apprentice's role and allows the relevant grading descriptors to be demonstrated.

Projects can be based on any of the following:

- A specific problem
- A recurring issue
- An idea or opportunity

Below is a list of example project types to give an idea of the kinds of topics which might be relevant for this apprenticeship. The projects provided are examples, other relevant projects are permitted.

- Plan and deliver a social media campaign across different channels, targeting new customers, which drives traffic to the website to provide a discount code for a customer's first purchase.
- Use email marketing software to contact existing customers to promote a new collaboration with an influencer, supported by offline marketing promotions such as leaflets. Analyse and evaluate the different elements of the campaign to make overall recommendations for the future.
- Analyse and evaluate a multi-channel marketing campaign that has previously taken place. Identify any strengths or weaknesses and use these to deliver a similar campaign, then evaluate the campaign performance.

The apprentice must complete the *Project Title and Scope Template* and submit it at gateway. This should be no more than 500 words. The IEPA will review the template and either approve or reject it within two working days. Gateway will not be approved until the IEPA has signed off the title and scope.

In order to help the apprentice and employer identify a suitable project, the *Project Title and Scope Template* includes a mapping table to identify how evidence might be created for each of the grading criteria assessed by this method. Although it is not mandatory to complete the mapping, it is strongly recommended.

PROJECT REPORT

The apprentice must complete a project report which must include:

- an introduction
- an executive summary
- the scope of the project (including key performance indicators)
- objectives
- research and methodology
- approach taken and risks to consider
- financial budgeting and resources
- outcomes and impact of the project implemented
- measure of success
- recommendations and conclusions.

Reports must be between 2250 and 2750 words. Reports with a word count outside of this will be marked as a fail. Appendices, references, diagrams etc. are not included in the word count.

The apprentice may work as part of a team which could include technical internal or external support. However, the project report must be the apprentice's own work and will be reflective of their own role and contribution.

Further information can be found in the *Project Guidance* document and *Evidence Requirements* document.

The project report must be mapped to the criteria using the *Project Referencing Table* The *Project Referencing Table* includes an apprentice and an employer declaration which must be completed prior to submission.

PRESENTATION MATERIALS

The presentation will provide an overview of the apprentice's project. All presentations must include:

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

Apprentices may use whichever medium they choose for their presentation, but the materials must be submitted electronically.

The project materials and speaker notes must be uploaded to epaPRO. The apprentice must not alter the project report, presentation materials or speaker notes in any way once submitted. Doing so may result in cancelled or failed assessments.

Document upload:

- Project report
- Presentation materials and speaker notes
- Project Referencing Table

PRESENTATION AND QUESTIONING: LIVE ASSESSMENT

The presentation with questioning will take place at least two weeks after the project report, presentation materials, speaker notes and referencing table have been submitted. This allows the IEPA time to assess the report and prepare questions.

The presentation and questioning will last 45 minutes (plus 10% at the IEPA's discretion to allow the apprentice to complete their last answer).

The presentation should typically last for 20 minutes with the remaining 25 minutes used for questioning. The IEPA will stop the presentation after 30 minutes to ensure that there are at least 15 minutes left for questions.

If the presentation is under 20 minutes, the apprentice will be asked if they have anything to add. They will then be asked if they are happy to move on to the next part of the assessment and the presentation will be drawn to a close. The remainder of the time can be used for questioning.

If the assessment exceeds this time limit, anything after 49.5 minutes will not be assessed.

QUESTIONS AND ANSWERS (Q&A)

There will be a 10-minute break between the presentation and the Q&A to allow time for the IEPA to finalise the questions to be asked.

The IEPA will ask a minimum of six and a maximum of 13 questions designed to:

- verify that the activity was completed by the apprentice.
- seek clarification where required.
- assess the grading descriptors that the apprentice did not have the opportunity to demonstrate with the report.

The IEPA may ask up to two follow-up prompts for each question to clarify their understanding, or probe for evidence for the distinction grading descriptors.

Sample Questions can be found here.

The apprentice may refer to their project report, presentation and speaker notes during the assessment.

Results will be available on epaPRO within five working days.

INTERVIEW

PORTFOLIO OF EVIDENCE

The portfolio should be a showcase demonstrating the apprentice's best work gathered during the on-programme stage of the apprenticeship. It must be mapped to the KSBs and grading criteria using the _Portfolio Referencing Table_.

The portfolio must contain at least one piece of evidence mapped clearly to each KSB and pass criterion assigned to this assessment method. The portfolio will typically contain 12 pieces of evidence. Each piece of evidence may map to more than one criterion. In addition to the pass criteria, the apprentice may also choose to map their evidence to the distinction criteria.

Evidence in the portfolio may include but is not limited to:

- workplace policies and procedures
- witness statements
- annotated photographs
- video clips (maximum total duration 5 minutes); the apprentice must be in view and identifiable

This is not a definitive list and other evidence sources are allowable.

The portfolio of evidence should not include reflective accounts or any methods of self-assessment. Any employer contributions should focus on direct observation of performance (for example, witness statements) rather than opinions. The evidence provided should be valid and attributable to the apprentice; the _Portfolio Referencing Table_ includes an apprentice and an employer declaration confirming this. Gateway will not be approved if this declaration is not signed.

Please refer to the _DSW Evidence Requirements Guidance_ for further information.

The portfolio will be reviewed by the IEPA ahead of the interview to help them prepare questions. As the portfolio is not assessed, feedback will not be provided on the portfolio evidence before the discussion.

INTERVIEW

The interview takes place between the apprentice and the IEPA and is designed to establish the apprentice's competence against the grading criteria that are assigned to this assessment method.

The interview will last for a maximum of 60 minutes (plus 10% at the IEPA's discretion to allow the apprentice to complete their last answer).

If the interview exceeds this time limit, anything after 66 minutes will not be assessed.

The IEPA will ask a minimum of eight and a maximum of 16 questions. They may ask up to two follow-up prompts for each question to clarify their understanding, or probe for evidence for the distinction grading criteria.

Sample Questions can be found here.

Results will be available on epaPRO within five working days.

GRADING

PROJECT REPORT WITH PRESENTATION AND QUESTIONING

To achieve a pass, the apprentice must meet all eight pass descriptors assigned to this assessment method.

To achieve a distinction, the apprentice must meet all eight pass descriptors and all five distinction descriptors assigned to this assessment method.

INTERVIEW

To achieve a pass, the apprentice must meet all 13 pass descriptors assigned to this assessment method.

To achieve a distinction, the apprentice must meet all 13 pass descriptors and all three distinction descriptors assigned to this assessment method.

OVERALL GRADING

In order to gain an overall EPA grade of pass, apprentices must achieve a pass in both assessment methods.

To achieve an overall grade of merit, the apprentice must achieve a pass in one assessment method and a distinction in the other.

To achieve an overall grade of distinction, the apprentice must achieve a distinction in both assessment methods.

RESITS AND RETAKES

Apprentices who fail will be offered the opportunity to take a resit or a retake. A resit does not require further learning, whereas a retake does.

The apprentice's employer will need to agree that a resit or retake is an appropriate course of action and should assist the apprentice in creating a supportive action plan to help them prepare for the resit or retake.

An apprentice who fails an assessment method will be required to resit or retake the failed assessment method only.

Resits and retakes are not offered to apprentices wishing to move to a higher grade.

A resit is typically taken within two months of the EPA outcome notification. The timescale for a retake is dependent on how much re-training is required and is typically taken within three months of the EPA outcome notification. Any resits or retakes must be taken within six months of the EPA outcome notification otherwise the entire EPA will need to be resat or retaken in full.

An apprentice will get a maximum EPA grade of pass for a resit or retake unless DSW determines that there are exceptional circumstances.

PROJECT REPORT WITH PRESENTATION AND QUESTIONING

If the apprentice is resubmitting based on the same project, they will be required to amend the project output in line with the IEPA's feedback. The apprentice will be given four weeks to rework and submit the amended report. A submission date will be agreed and the resit will take place at least two weeks after the amended materials have been submitted.

The resit will then take place a minimum of two weeks after resubmission of the report and presentation materials.

The apprentice will be given a different set of questions in the case of resits or retakes.

Where apprentices are required to complete an entirely new project, timescales will be agreed on a case-by-case basis.

INTERVIEW

If the apprentice fails the interview, it can be resat or retaken. The apprentice is not permitted to amend or resubmit their portfolio of evidence. The IEPA will prepare a new set of interview questions for a resit or retake.

SUPPORTING DOCUMENTS

The documents in this table have been developed specifically for the Level 3 Multi-Channel Marketer standard.

DOCUMENT	DESCRIPTION
Amplifications	Shows which pass and distinction criteria need to be met through which assessment method, along with additional guidance of the evidence required.
Title and Scope Template	The apprentice must submit the Project Title and Scope Template at gateway. The apprentice may choose to map their project to identify how evidence might be created for each grading criteria assessed by this method.
Project Guidance	Further information and guidance on the creation of a project report and presentation.
Portfolio Referencing Table	The apprentice must submit the Portfolio Referencing Table along with their portfolio at gateway. The apprentice should map their evidence to the specific criteria to which it relates.
Project Referencing Table	The project report must be mapped to the criteria using the Project Referencing Table. The Project Referencing Table includes an apprentice and an employer declaration which must be completed prior to submission.
Sample Questions	Sample assessment questions.
Toolkit Amendments	Details all amendments made to the Toolkit and supporting documents.

Further guidance documents which you may find helpful but are not specific to the People Professional standard are available to download via the links below:

- Policies and Procedures
- Conditions for Live Assessment
- Templates
  - Witness Testimony
  - Observation Record
  - Context Statement
- Technical requirements for assessment and Zoom/WebEx/Teams user guides
- DSW Evidence Requirements

01302 760 008

epa@dswlearning.co.uk

www.dswlearning.co.uk

DSW House
Unit 3 Hayfield Business Park
Field Lane
Auckley
Doncaster
South Yorkshire
DN9 3FL