



End-Point Assessment

Market Research Executive Level 4 (V1.0)

Support Pack



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INTRODUCTION

This document sets out the requirements, advice and guidance for the End-Point Assessment (EPA) of the Market Research Executive Level 4 standard. This document is designed for apprentices, employers and training providers involved in the End-Point Assessment of an apprentice studying Market Research Executive Level 4.

An apprentice for Market Research Executive Level 4 should typically spend up to 18 months on programme, although this may vary depending on previous experience.

This support pack is divided into sections covering all the relevant aspects of EPA for the Market Research Executive Level 4.

Should you require any further information other than the guidance in this document, please do not hesitate to contact admin@nqual.co.uk

Within this support pack, you will find references to End-Point Assessments. This information has been outlined in the Institute for Apprenticeships and Technical Education, Market Research Executive Level 4 Assessment Plan. For reference, you can find this document.

[Market Research Executive L4 EPA Plan \(instituteforapprenticeships.org\)](https://www.instituteforapprenticeships.org/Market-Research-Executive-Level-4-Assessment-Plan)



EPA TIMESCALE



GATEWAY

This section outlines the requirements an apprentice must have met in order to complete their End-Point Assessment.

Once the employer is fully satisfied that the apprentice has the knowledge, skills and behaviours set out within this standard, the employer can formally confirm that the apprentice is ready for EPA via Gateway.

Gateway requirements for Market Research Executive Level 4 outline the apprentice must have:

- **Evidence of achieving relevant maths and English qualifications if required by funding regulations or the employer**
- **Apprentice must submit a Portfolio of Evidence**
- **Apprentice must submit a proposal title and scope**

The Gateway form must be sent to NQual a maximum of 14 weeks before End-Point Assessment is carried out, along with the evidence listed above.

You can access the NQual Gateway form by emailing: admin@nqual.co.uk

PREPARE FOR THE PORTFOLIO OF EVIDENCE

As part of the apprenticeship, apprentices are required to prepare a Portfolio of Evidence which will be developed on programme to demonstrate their practice in achieving the knowledge, skills and behaviours (KSBs) associated with the Professional Discussion.

The on-programme portfolio that will inform the Professional Discussion might include observations (key component of your portfolio), witness statements, Q&A, professional discussions, 360-degree feedback, product evidence, progress reviews and development plans (*please note that this is not an exhaustive list).

The submission should typically be 15 pieces of evidence.

COMPONENTS OF END-POINT ASSESSMENT

Work-Based Project with a Presentation and Q&A

The assessment method is the production of a Work-Based Project, Presentation and Questioning. The Work-Based Project must be undertaken after the apprentice has gone through the Gateway.

This assessment method includes two components:

- A Work-Based Project
- A Presentation with Questioning to ensure the apprentice is assessed correctly against the KSBs assigned to this assessment method.

Component One: Work-Based Project

A Work-Based Project involves the apprentice completing a relevant piece of work that meets the needs of the business and is relevant to their role.

Once the project and scope are confirmed and accepted by NQual, apprentices have a maximum of 12 weeks to write and submit the Project and Presentation.

The project word limit is 4,000 words (+/-10% at the apprentice's discretion). Appendices including references, pictorial representations, diagrams etc will not be included in this total.

The project must include evidence of board or senior leader sign-off for implementation. This will be achieved by completing the NQual Project Submission document, sent to the apprentice upon acceptance of the project title.

Each project must enable the following to be demonstrated:

- The application of knowledge, skills and behaviours to meet the outcomes in the standard.
- It is designed to assess apprentices in a consistent way, irrespective of their workplace.

The project may be based on any of the following:

- Research to develop a marketing strategy to increase sales and market share for a retail client.
- Research to understand why there is low take-up of a product, service or educational/vocational training programme.
- Research to identify strengths and weaknesses in a current service provided by a supplier and develop a strategy to improve its marketing.

Specific examples of work-based projects are below as a guide:

- Undertake research for a bank in order for them to gain a deeper understanding of its customers and identify the strengths and weaknesses of its current service. Support the bank in developing a credible strategy for its retail banking arm.
- Undertake research for a government educational body that has instructed local authorities to focus on one area for improvement. The research will focus on the low uptake of science, technology, engineering and mathematics (STEM) subjects by female students to gain an understanding of why this is happening and to ascertain what support can be given to increase take up.
- Work with a manufacturer to undertake research to understand why its leading brand is falling behind competitor brands on key attributes, and what they can do to increase preference for their brand among customers.
- Collaborate with a travel agent to undertake research in order to understand which types of attraction people most are interested in visiting whilst on holiday, to allow their marketing team to develop a targeted email marketing campaign ahead of the Spring/Summer holiday season.

In order to ensure the project is robust and sufficiently covers the knowledge, skills and behaviours it 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

The apprentice will be required to document their understanding and actions and to highlight the consequences of those actions, enabling them to demonstrate their understanding of commercial pressures, and the application of their thinking and problem-solving skills. This will form part of their findings and recommendations.

Component Two: Presentation with Q&A

The Presentation with Questioning involves the apprentice presenting to their Independent End-Point Assessor. Apprentices will prepare and deliver a presentation that appropriately covers the KSBs assigned to this method of assessment. The purpose of the questioning is to seek clarification of the project and presentation to assess those knowledge, skills and behaviours that the apprentice did not have the opportunity to demonstrate with the project, although these should be kept to a minimum. The presentation must be submitted at the same time as the project, within 12 weeks from approval of the scope. The Independent End-Point Assessor will have two weeks prior to the presentation to review the strategic business proposal.

This component will take 40 minutes plus 10% if required. The presentation will typically last for 15 minutes and the questioning for 25 minutes. The

apprentice will be asked a minimum of 5 questions at the end of their presentation with 1 question from each of the themes in the grading descriptors.

The purpose of the questions will be for clarification and to assess the depth and breadth of understanding.

To deliver the presentation, the apprentice may need access to:

- Audio-visual presentation equipment
- Flip chart and writing and drawing materials
- Computer
- Any other requirements as notified to NQual on submission of the strategic business proposal and presentation.

Professional Discussion Underpinned by a Portfolio of Evidence

The Professional Discussion is a two-way structured discussion between the apprentice and the Independent End-Point Assessor, this gives an opportunity to make detailed and proactive contributions to confirm competency across the KSBs that are required to be covered. It allows a range of examples to be brought forward during the conversation and ensures that excellence can be achieved and acknowledged.

The Professional Discussion will be appropriately structured to draw out the best of the apprentice's competency and cover the KSBs assigned to this assessment method. The Professional Discussion will last for 60 minutes, with a time increase of up to 10% at the discretion of the Independent End-Point Assessor.

The Professional Discussion will have a minimum of 8 questions.

The Portfolio of Evidence can be used in this assessment method to support responses from the apprentice. The portfolio must be provided at Gateway so that the Independent End-Point Assessor has time to review the contents.

END-POINT ASSESSMENT METHODS TABLE

The below highlights criteria that will be covered in each assessment component. Please review these details as it will provide guidance on what will be covered in each assessment component.

Learning Outcomes	What is Required	Work-Based Project with Presentation and Q&A	Professional Discussion Underpinned by a Portfolio of Evidence
Knowledge			
K1	The role research plays in the business process, such as the target market, consumers (behaviour or attitudes), competitors or the industry as a whole.		✓
K2	How research is used to address business, customer and policy questions, such as information related to products, services or advertising etc		✓
K3	The principles of Quantitative research and the underlying theories such as sampling, representativeness, statistical theory, data collection and analysis.	✓	
K4	The principles of Qualitative research and underlying theories of the social sciences e.g., representativeness, sampling theory analysis methods.	✓	
K5	The research methodologies including Face to face (F2F), telephone, online, and postal.	✓	
K6	Approaches to primary research and the different sources of primary research data.		✓
K7	Approaches to secondary research and how information is sourced and utilised from previously conducted studies		✓
K8	The principles of research project management such as time management, scheduling, resourcing, costs and budgeting.	✓	
K9	Relevant regulatory and legislative requirements such as data protection, GDPR, confidentiality, informed consent and safeguarding, ethics and The Market Research Society Code of Conduct.		✓
K10	Technologies such as digital sources, systems and software, that can help		✓

	deliver market research, delivery and evaluation.		
K11	Technology and software used to provide appropriate representation of data and manipulate them into appropriate formats (tables, graphs and portfolios) for publication.	✓	
Skills			
S1	Liaise with and manage, clients, stakeholders, internal teams and external suppliers to deliver required outcomes.		✓
S2	Undertake data collection, data analysis, data presentation and data storage including analysis and validation of the outputs from primary or secondary research data sources.	✓	
S3	Interpret, prepare and communicate research findings such as presentations, reports, and workshops	✓	
S4	Make evidence-based recommendations from research results.	✓	
S5	Use communications skills and techniques such as negotiation, collaboration, problem solving, and decision making.		✓
S6	Interpret research objectives and translate into research design and implementation.	✓	
S7	Use digital and IT software packages relevant to the role.	✓	
S8	Use research/survey software to gather audience insight and/or evaluation such as SPSS (Statistical Product and Service Solutions)		✓
S9	Select and use appropriate research design techniques	✓	
S10	Evaluate data and research findings to derive insights to support improvements to future research projects.		✓
Behaviours			
B1	Works without bias	✓	

B2	Seeks learning opportunities and continuous professional development.		✓
B3	Works collaboratively.		✓
B4	Works ethically recognising participants needs and data privacy.		✓
B5	Works flexibly and adapts to circumstances.		✓
B6	Takes responsibility, shows initiative and is organised.	✓	

GRADING & CRITERIA

Assessments will result in the apprentice achieving a Fail, Pass, or Distinction. This decision is dependent on whether they have met the standard and its End-Point Assessment criteria.

In order to achieve a Passing grade, the apprentice must gain a minimum of a Pass in all components of the End-Point Assessment. To achieve a Distinction, the apprentice must achieve all Pass and all Distinction criteria.

Grading results will be communicated to the apprentice within 10 working days of completion of the final component.

Assessment Breakdown

Grades allocated for each component will be Fail, Pass and Distinction.

The final grade will be decided on the following combinations.

Assessment Methods 1: Work-Based Project with Presentation and Q&A	Assessment Methods 2: Professional Discussion Underpinned by a Portfolio of Evidence	Overall Grade
Fail	Any Grade	Fail
Any Grade	Fail	Fail
Pass	Pass	Pass
Distinction	Pass	Pass
Pass	Distinction	Pass
Distinction	Distinction	Distinction

Pass and Distinction descriptors can be found in the tables below and are separated into Work-Based Project with Presentation and Questioning and Professional Discussion Underpinned by Portfolio of Evidence.

Grading Descriptors for Work-Based Project with Presentation and Q&A

KSBs	Pass Descriptors	Distinction Descriptors	Guidance Notes
<p>Research K3 K4 S9</p>	<p>Justifies their research design and use of qualitative and quantitative techniques with reference to principles and underlying theories (K3, K4, S9)</p>	<p>Analyses and critiques a range of Quantitative and Qualitative principles and theories in order to determine the appropriate approach (K3, K4, S9).</p>	<p>Clearly state the research problem and objectives. Explain why the chosen problem requires a comprehensive understanding that can be achieved through both qualitative and quantitative approaches.</p> <p>Clearly outline the pros and cons of each method.</p> <p>If only a qualitative / quantitative approach is used, then justify why as well as any considerations for the alternative approach.</p> <p>Demonstrate how the chosen theories support the use of both qualitative and quantitative methods to explore and explain different aspects of the research problem.</p> <p>At least 1 theory and 1 principle discussed and how these were used to determine the approach to the project (e.g. 7 P's, Maslow's Hierarchy, Marketing Mix, Porters 5 Forces).</p>

<p>Methodologies and Analysis K5 K8 S2 S4 S6 B6</p>	<p>Outlines the research methodologies (Face-to-face, telephone, on-line and postal) used and explains how the findings have been used to make evidence-based recommendations (K5, S4)</p> <p>Interprets and takes responsibility for research objectives, using their initiative to organise and translate them into research design and implementation processes that incorporate the principles of research project management such as time management, scheduling, resourcing, costs and budgeting (K8, S6, B6)</p> <p>Demonstrates how they undertake data collection, data analysis, data presentation and data storage, including the analysis and validation of the outputs from primary or secondary research data sources (S2)</p>	<p>(S2) Evaluates the strengths and weaknesses of the research methodologies used and explains how this informs the recommendations they have made (K5, S4)</p> <p>Analyses and evaluates the design and implementation approach they have taken with reference to how well the research objectives have been met (S6)</p>	<p>Clearly defines and justifies their research methodology and why it was fit for purpose. Evaluation e.g. pros and cons of at least 2 different research methods.</p> <p>Clearly articulate how each methodology contributes to answering specific research questions or objectives. Discuss any unexpected findings and the implications they might have on the overall research outcomes. Consideration of any follow up research that could be used to further expand on project.</p> <p>Demonstrate proactive involvement in translating research objectives into a coherent research design - strengths and weaknesses of each approach would be expected.</p> <p>Explain the approach taken for research project management, encompassing time management, scheduling, resource allocation, and budgeting.</p> <p>Example as to how they took responsibility of the overall project and the impact this had on its implementation.</p> <p>Any effective tools that were used to support with project management e.g. Gantt Charts, RACI Matrix, Risk Register.</p>
<p>Communication S3 B1</p>	<p>Presents research findings clearly, providing examples of methods used to communicate findings to stakeholders, through forms such as reports, presentations and workshops, and how they have ensured their interpretation of results is free of bias. (S3, B1)</p>	<p>Justifies the communication methods used to present their findings and why others were not suitable (S3)</p>	<p>Clearly articulate the research findings in a comprehensive manner, ensuring that language is accessible to both experts and non-experts. Steps taken to ensure their interpretation of results is free from bias (at least 1 example).</p>

			<p>Utilise visuals such as charts, graphs, and tables to enhance clarity.</p> <p>Outlines and justifies at least 2 different communication methods used or considered and why others where not suitable for this project.</p> <p>Consideration of various communication styles / methods and how these would be adapted for various internal and external stakeholders.</p>
<p>Technology K11 S7</p>	<p>Outlines the technology and IT software, relevant to their role, and how they use these to provide representations of data such as tables, graphs and portfolios for publication (K11, S7)</p>		<p>Example of at least 2 different forms of technology or software they use within their role and how its fit for purpose.</p> <p>How it ensures that information is collated and displayed in an appropriate manner when presenting research findings.</p>

Grading Descriptors for Professional Discussion Underpinned by a Portfolio of Evidence

KSBs	Pass Descriptors	Distinction Descriptors	Guidance Notes
<p>Research K1 K2 K9 B4</p>	<p>Explains the role that research plays in the business process, such as the target market, consumers, competitors or the industry as a whole (K1)</p> <p>Describes how they have used research to address business, customer or policy questions in line with legislative requirements such as GDPR and the Market Research Society Code of Conduct. Ensures that the participants' needs, and data privacy are considered. (K2, K9, B4)</p>	<p>Critically evaluates the importance of research to their organisation and the sector in which they work (K1)</p>	<p>How research helps in identifying and understanding the characteristics, preferences, and behaviours of the target market, competitors, or industry in which they operate.</p> <p>How the research they conduct aids with segmentation, allowing businesses to tailor products and marketing strategies to specific customer segments.</p> <p>Pros and cons of the research they undertake within their organisation / sector.</p> <p>Various policies and procedures they need to follow to ensure GDPR and personal data is protected with example as to how they actively follow these procedures within their role when collating and distributing data.</p>
<p>Methodologies and Analysis K6 K7 S10</p>	<p>Describes the approaches they take to primary and secondary research, explaining how the information is sourced and how they utilise data from previously conducted studies (K6, K7)</p> <p>Explains how they have evaluated data and research findings to derive insights with examples of how this has been used to recommend improvements to subsequent research projects (S10)</p>	<p>Explains the advantages and limitations of the approach they have used when undertaking primary and secondary research and how these should be evaluated (K6, K7)</p> <p>Reviews recommendations gathered from data and research findings, enabling improvements to future research projects. (S10)</p>	<p>Clearly define the difference between primary and secondary research methods with at least 2 examples. Explain at least 2 advantages and 2 limitations of their chosen approach.</p> <p>Example as to how they have utilised data from previous conducted studies and how these can be utilised to support future projects.</p> <p>Describe the steps taken to validate the quality and reliability of collected data, such as double-checking responses, ensuring completeness, and addressing outliers.</p>

<p>Communication S1 S5 B3</p>	<p>Describes how they have liaised and managed a range of external and internal stakeholders, using communication skills and collaborative working to deliver required outcomes. (S1, S5, B3)</p>		<p>Clearly outline how stakeholders, both internal and external, were identified and categorised based on their relevance to the project or organisation. Describe the communication strategy employed to convey project goals, progress, and potential impacts to stakeholders. Explain how efforts were made to understand the needs, expectations, and concerns of different stakeholders. At least 1 example as to when they have worked collaboratively with other stakeholders and the impact this had.</p>
<p>Self-Development B2 B5</p>	<p>Outlines how they have adapted to changing circumstances including how this has led to them identifying and seeking out opportunities for professional development (B2, B5)</p>		<p>Highlight instances / examples where changing circumstances required adaptability with supporting example. Explain how you navigated unexpected challenges by employing effective problem-solving skills.</p> <p>Example as to how they manage their own personal development plan and hold themselves accountable for achieving actions within their self-development. Explain the process of setting clear and achievable professional development goals.</p>
<p>Technology K10 S8</p>	<p>Explains how technology, including research/survey software, has helped them deliver research and evaluation activities (K10, S8)</p>	<p>Evaluates research/survey software they have used, identifying its strengths and weaknesses in gathering audience insight (S8)</p>	<p>Provide at least 2 different examples of different research/survey software or technology they use within their role and how these effectively allow them to conduct and present research. Pros and cons of each method would be expected.</p>

Re-sit / Re-take

If an apprentice Fails one or more component, they will be offered the opportunity to re-sit / re-take the component(s). It is then up to the apprentice's employer how many attempts an apprentice is given.

The timescale for a re-sit typically takes 3 months and a re-take 6 months (dependent on how much re-training is required). All assessment methods must be taken within a 6-month period, otherwise the entire EPA will need to be resat / retaken.

Where any assessment method must be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of Pass. Re-sits and re-takes are not offered to an apprentice wishing to move from Pass to a higher grade.

MOCK PROFESSIONAL DISCUSSION

It is the responsibility of the employer and training provider to complete Mock Professional Discussions with the apprentice and the responsibility of the apprentice to ensure they have practised answering questions for their End-Point Assessment.

Professional Discussion materials will be given to the training providers when registering learners with NQual.

A Mock Professional Discussion should take a maximum of 60 minutes (+/- 10%).

PORTFOLIO GUIDANCE

For the Professional Discussion Underpinned by a Portfolio of Evidence the apprentice will be required to submit a Portfolio of Evidence

The Portfolio of Evidence requirements are as follows:

- Apprentices must prepare a Portfolio of Evidence during the on-programme period of the apprenticeship.
- The format and structure of the portfolio must be agreed between the employer and apprentice and will be presented electronically.
- It must contain evidence related to the KSBs that will be assessed by the Professional Discussion.
- The portfolio of evidence will **typically contain 15 discrete pieces of evidence**.
- Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is suggested.

Evidence Sources May Include:

- Video/audio extracts (these should be a maximum of a continuous 5 minutes in length for each clip and a maximum of 3 clips; and the apprentice must be in view and identifiable)
- Written statements
- Project plans from projects they have completed during the apprenticeship (this should not include the project to be undertaken for End-Point Assessment)
- Reports; minutes from team meetings
- Presentations
- Feedback from managers, supervisors or peers (any employer or peer contributions)
- Should focus only direct observation of evidence (for example witness statements) rather than opinions)
- Papers written by the apprentice
- Performance reviews
- Personal Development Plan
- Screenshots / annotated pictures of internal policies and procedures relating to GDPR, safeguarding, Market Research Society Code of Conduct and Ethics.
- Evidence of Project Management tools e.g. Gantt Chart, Risk Register, Stakeholder mapping docs etc.
- Evidence / screenshots of relevant data collection and analysis systems / IT packages.
- Evidence of time keeping and effective methods of organisation
- Evidence of market research and competitor analysis that has been undertaken within their role
- Examples of methods of communication used within their role
- Evidence / screenshots of relevant research / survey software

Marketing Theories / Models

- 7 P's of Marketing Mix
- SWOT Analysis
- Maslow's Hierarchy of Needs
- Market Segmentation
- Customer Segmentation Funnel – Awareness, Interest, Consideration, Purchase & loyalty
- Porters 5 Forces
- Balance Scorecard
- PESTLE Analysis
- Boston Matrix
- McKinsey Matrix
- Kotlers 5 Product Levels
- New Product Development Framework
- Customer Experience Mapping
- AIDA Model
- STAR Model approach when managing various projects

***This is not a definitive list; other evidence sources can be included.**

Please note the portfolio should not include reflective accounts or any methods of self-assessment. The content must be sufficient to evidence the apprentice can apply the knowledge, skills and behaviours required as mapped to the Professional Discussion.

There must be at least one piece of evidence relating to each knowledge, skill and behaviour mapped to the Professional Discussion.

The evidence provided must be valid and attributable to the apprentice; the Portfolio of Evidence must contain a statement from the employer confirming this.

The Portfolio of Evidence must be submitted to NQual at Gateway.

Please remember that the Portfolio of Evidence is not directly assessed. It underpins the Professional Discussion and therefore, is not marked. The IA will review the Portfolio of Evidence in preparation for the Professional Discussion but are not required to provide feedback after this review.



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