TECHNOLOGICAL METHODS AND TOOLS IN FAVOUR OF THE PROFESSIONAL DEVELOPMENT OF NEW EMPLOYEES

JOB PROFILES AND PATHWAYS

TO ATTAIN COMPETENCES

Coordination| Kairos S.p.A.

newdeal
employees development and learning

Lifelong
Learning

DESCRIPTION OF JOB PROFILES

Introduction

In the framework of the NEW DEAL project, partners member of the Group of Trainers were asked to select 5 professional profiles, typical of the economic sector chosen for the experimentation, that is the large scale retail trade. Each profile had to be described as regards specific tasks and activities, competencies needed (in terms of knowledge, skills and attitudes) for a new employee willing to perform that job.

Furthermore, the profiles selected and described, are accompanied by the definition of a modular training path to attain the requested skills to perform the role: the path is composed by a mix of training methodologies, such as on the job, classroom and distance learning. Therefore each profile sees one or more pattern training units, describing the learning outcomes expected, the prior knowledge/experience requested, the contents, the duration, the training methodologies and tools, the assessment methodology, etc.

Each profile and related path will be translated in all partners languages and published on the website. The paths are developed in a modular way, that is, can be taken partly and as far as possible in different sequence, so that each new employee will be enabled to take only the parts of units necessary to his/her skills development, according to his/her entry competences and career objectives.

Before going to the description of profiles and related paths of skills development for the new employees, partners had to explain the respective concepts of *new employee* and find some common features.

The 5 profiles selected mainly concerns the activities related to selling, although with different features. The profiles are:

- Sales professional
- Sales activities
- Shelving self service
- Sales manager
- Administrative assistant

Each profile in this document is therefore followed by the description of the relating path to attain expected competencies.

New employee: some definition

Researchers and managers use the term 'new' to describe organizational members who have recently joined an organization, but how long are arriving recruits considered 'new employees', and what factors drive this new-to-old transition? The term "new employee" is commonplace in both organizational research and managerial practice. Researchers use the term to define a subset of organizational members that have recently entered an organization, and argue that the initial experiences of these members in the first weeks, months, or years after entry have major implications for the members' entire organizational career (Berlew & Hall, 1966).

Partners have proposed some definitions, that are described in this document. Then they agreed on few issues in order to identify a shared definition and recognize target groups for testing the model.

Oviedo Chamber of Commerce – SPAIN

New employee is the person who starts to develop a new professional activity, either because it is his/her first job in a company or because he/she is changing function, responsibilities or position inside the company where he/she has been working.

INSUP – FRANCE

When a company is recruiting a candidate for a position, the candidate is a NEW EMPLOYEE since he signs his labour contract to the end of the trial period.

He is considered like a new employee during his **trial period** : 1 month for a employee extensible to 2 months, 3 months extensible to 6 months for a manager.

Labour literature calls "JUNIOR", a new employee from the end of trial period to 3 years spent in the same position.

LEBOTERF says a New employee is a person who **has to familiarize with the job** (activities, process), the **culture** of the company (management, internal rules): he also explains that the context of the job is essential to explain the success or failure on the position.

NWRC – UK

Good customer care skills are essential when applying for a job as a sales assistant.

It is helpful if the new employee already has some **experience of working with the public.**

Good **literacy and numeracy skills** are also useful, for example for when handling cash.

New employees may also be able to start this career through an **Apprenticeship** scheme.

New employees need to be

- good communicators
- able to get on well with people
- able to work as part of a team
- friendly, polite and helpful
- confident and tactful
- energetic
- reliable and responsible
- honest

AVM – LITHUANIA

New employee is a person who **has knowledge and skills in a certain professional area** and seeks to be employed in a new company/organization.

Adaptation and **integration** processes are required to support a new employee for the introduction to the new job position.

For new employee we mean a **young person** (18 - 29 y.o.) joining a company through a so-called "contratto a causa mista" (literally "mixed-type contract"). This contract implies some **training**; for example, **apprenticeship** contracts are included in this category. Also some training is implied in the training-on-the-job programme framework (which is not an employment contract; for example the so-called "tirocinio formativo", which is a type of internship).

An individual (young or adult) joining a company with an employment contract (either permanent or temporary), who **does not yet possess the specific skills or expertise** of the job for which they are applying.

An individual (young or adult) **already working in a given position**, for whom the company wants to develop a **career path**, to prepare him/her for a position higher than his/her current position (for example, a salesperson who becomes a department manager).

New employee definition: shared issues

1. A new employee is a person who is working for the first time **in the company** or **in the job/position**

2. Usually companies define **skills** that must be **already possessed** by the candidate (to be verified through a job interview), and **new skills**, to be developed through classic training and/or training on the job.

3. **Duration** of employment during which the worker can be defined as a new employee: **0-1 year** (better **0-6 months**)

4. A new employee, in addition to having to learn and develop **technical skills** (directly related to the job position) and **soft skills**, must be able to adapt his/her knowledge and expertise to the specific **context** and to corporate **culture**.

SALES PROFESSIONAL

Job profile and path of skills development | NWRC (UK)

DESCRIPTION OF JOB PROFILE

COUNTRY	United Kingdom
JOB TITLE	**Sales Professional** could be Supervisor/First Line Manager/Departmental Manager/Section Manager – (big store) Owner/Manager (small business)
RETAIL SECTOR/SPECIALITY	Retail
COMPANY	Various – big stores and small businesses
DEPARTMENT	Sales
JOB PURPOSE (short description)	Supervisor/First Line Manager/Departmental Manager/Section Manager – (big store) Owner/Manager (small business)
REPORTS TO ("upstream" connections)	Supervisor/First Line Manager/Departmental manager/ Section Manager – (big store) reports to Store Manager Owner/Manager (small business) may report to no-one as owner/manager or reports to owner of the business if employed as manager
MANAGES ("downstream" connections/span of control)	Supervisor/First Line Manager/Departmental Manager/Section Manager – manages departmental staff (big store) Owner/manager (small business) manages own staff
CONNECTED TO (horizontal connections)	Supervisor/First Line Manager/Departmental Manager/Section Manager – (big store) connected to other Departmental/Section Managers
KEY RESPONSIBILITIES AND ACCOUNTABILITIES (main activities)	♦ Ensure the section/department/business is run effectively and profitably ♦ Manage and motivate a small team of staff to maximise the store and stock potential ♦ Monitor and audit stock levels ♦ Monitor and evaluate quality of service provided ♦ Work with others to improve customer service ♦ Monitor and solve customer service problems
KEY SKILLS AND COMPETENCIES (technical/area specific skills and soft skills acquired in formal, non-formal and informal contexts)	♦ Be a skilled communicator and influencer. ♦ Stay focused and effective at all times, leading the way through change. ♦ Get the best out of staff and resources, building strong relationships that help you deliver success. ♦ Lead and motivate himself/herself and team to meet ambitious targets. ♦ Use knowledge of customers, the business and competitors to recognize new opportunities

EXPERIENCE REQUIRED (years spent in the role)	No specific number of years but retail experience in the section/area/department and perhaps experience in deputising for supervisor/section head
EDUCATION/TRAINING/QUALIFICATIONS REQUIRED	No specific qualifications. However in-house training to prepare staff for role in some organisations may be provided.
EQF LEVEL (or other European standards)	EQF 4 (Source: http://ec.europa.eu/eqf/compare/uk-eni_en.htm#comparison)
NATIONAL QUALIFICATION LEVEL	3
OTHER REQUIREMENTS	Depends on organization. Some organisations have no other requirements. Other organisations if employee is undertaking the qualification - Level 3 Diploma in Retail (Sales Professional) , he/she must also undertake Level 3 Certificate in Retail Knowledge
CAREER DEVELOPMENT	Store Manager

SALES PROFESSIONAL: PATHWAY TO ATTAIN COMPETENCES

Training unit 1. Principles of Social Media, advertising and promotion

Description

The aim of this unit is about understanding advertising and promotion within social media and the use of digital vouchers for a retail business.

EQF Level

EQF LEVEL 4
QCF LEVEL 3.
(http://www2.ofqual.gov.uk/qualifications-assessments/eqf)

Reference to national/regional qualifications

Yes – see UK Register of Regulated Qualifications Framework
http://register.ofqual.gov.uk/Unit/Details/J_503_9322

This unit is endorsed by CfA, the Council for Administration, and e-skills UK, the Sector Skills Council for Business and Information Technology.

Learning Outcomes

At the end of this unit the learner will:

1. Be able to plan how to use digital vouchers for marketing purposes
2. Be able to plan the implementation of Social Networking site advertising campaigns for Marketing purposes
3. Understand the use of promotional campaigns on social networking sites
4. Understand current national and international legal and organisational guidelines for a social networking advertising/promotional campaign

Prior knowledge/experience

There are no formal entry requirements for learners undertaking this qualification. However, centres must ensure that learners have the potential and opportunity to gain the qualification successfully.

Prior knowledge is to be assessed through initial assessment.

An initial assessment of each candidate should be made before the start of their programme/unit to identify:

- if the candidate has any specific training needs,
- support and guidance they may need when working towards their qualification.
- any units they have already completed, or credit they have accumulated which is relevant to the qualification.
- the appropriate type and level of qualification.

Recommended assessment methods

Assessment is through assignment/portfolio. Candidates and centres may decide to use a paper-based or electronic method of recording evidence. City & Guilds endorses several ePortfolio systems, including their own, Learning Assistant, an easy-to-use and secure online tool to support and evidence learners' progress towards achieving qualifications. Further details are available at: www.cityandguilds.com/eportfolios

City & Guilds has developed a set of Recording forms including examples of completed forms, for new and existing centres to use as appropriate. Recording forms are available on the City & Guilds website.
Learners undertaking a Level 3 qualification will be capable of working at supervisory/ section manager level.
As part of the assessment for this qualification, learners must have access to a work or realistic work environment (RWE).

Links with other units/elements

Connections with other units in the training pathway.

Title: Principles of Social Media Advertising and Promotion
Unit Reference Number: J/503/9322

Qualifications using this Unit

Qualification Number	Qualification Type	Title	Credits	Operational Start Date	Other Units in Qualification
600/7154/0	QCF	City & Guilds Level 3 Award in Principles of Social Media Advertising and Promotion (QCF)	6	01-Dec-2012	None, just the unit ♦ *Principles of Social Media Advertising and Promotion (6 credits)*
600/7156/4	QCF	City & Guilds Level 3 Certificate in Principles of Social Media Advertising and Promotion (QCF)	17	01-Dec-2012	♦ *Communicating using digital marketing/sales channels (4 credits)* ♦ *Social Networking Management for a Business (7 credits)*
600/7376/7	QCF	City & Guilds Level 3 Certificate in the Principles of Social Media for a Business (QCF)	26	01-Dec-2012	♦ *Principles of Social Media within a Business (mandatory) (6 credits* and choice of several units up to a total of 20 credits. It could include ♦ *Principles of Keywords and Optimisation (5 credits)* Etc. For full details and combinations see http://register.ofqual.gov.uk/Qualification/Details/600_7376_7
601/0110/6	QCF	City & Guilds Level 3 Diploma in Digital Marketing (QCF)	74	01-Sep-2013	Learners must achieve 74 credits overall. 27 credits from the mandatory units. The mandatory units are: ♦ *Understanding the business environment (2 credits)* ♦ *Understanding legal, regulatory and ethical requirements in sales or marketing (2 credits)* ♦ *Using Collaborative Technologies (6 credits)* ♦ *Principles of marketing and evaluation (7 credits)* ♦ *Develop own professionalism (4 credits)* ♦ *Digital marketing metrics and analytics (6 credits)* A minimum of 14 credits must come from Group A. The remaining 33

Qualification Number	Qualification Type	Title	Credits	Operational Start Date	Other Units in Qualification
					credits can come from a combination of Group A and Group B, or from Group B alone For more details see http://register.ofqual.gov.uk/Qualification/Details/601_0110_6
600/4967/4	QCF	City & Guilds Level 3 Diploma In Social Media for Business (QCF)	42	01-May-2012	Learners must achieve a minimum of 42 credits to achieve the qualification. 24 credits must come from Mandatory group M1 plus a minimum of 18 credits from their chosen pathway The mandatory units are: ♦ *Using Collaborative Technologies (6 credits)* ♦ *Principles of Social Media within a Business (6 credits)* ♦ *Principles of Keywords and Optimisation (5 credits)* ♦ *Social Networking Management for a Business (7 credits)* For more details see http://register.ofqual.gov.uk/Qualification/Details/600_4967_4

Source - http://register.ofqual.gov.uk/Unit/Qualifications?referenceNumber=J_503_9322

Competences

Competence description	Learning outcomes			
	1	2	3	4
a. Define the term digital vouchers	x			
b. Explain the potential uses of digital vouchers	x			
c. Research the current disadvantages of digital vouchers	x			
d. Explain how to overcome the barriers of using digital vouchers for acquisition and retention of customers	x			
e. Plan a SMART digital voucher campaign for a business	x			
f. Explain methods of managing a digital voucher system	x			
g. Explain how to measure the effectiveness of a digital voucher campaign	x			
h. Explain the factors to consider when creating social networking adverts		x		
i. Justify the use of Social Networking site advertising campaigns		x		
j. Explain the importance of identifying the required outcomes from the Social Networking advertising campaigns		x		
k. Explain the advantages of creating more than one advertising campaign running in parallel on the same social networking site		x		
l. Plan parallel Social Networking site advertising campaigns for a business		x		
m. Explain methods of monitoring Social Networking site advertising campaigns		x		
n. Identify changes that might be required for a Social Networking advertising campaign based on monitoring results		x		
o. Define promotional campaigns on social networking sites			x	
p. Compare different types of promotional campaigns on social networking sites			x	

q. Explain why to use promotional campaigns on social networking sites			x	
r. Explain the limitations imposed by social networking sites on promotional campaigns			x	
s. Explain how to comply with restrictions on promotional campaigns on social networking sites			x	
t. Explain the factors which could cause negative PR when running a promotional campaign			X	
u. Explain the current national and international legal and organisational guidelines relating to the use of social networking site adverts				x
v. Explain the importance of following current national and international legal and organisational guidelines for a social networking advertising/promotional campaign				X

Content

Content description	Competences																						
	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w
1. **Digital vouchers** e.g. Groupon, KGB deals, Living Social, Voucher codes	x						x																
2. **Potential uses** eg: Promotes deals of the day, tickets or discounted gift certificates delivered through web or via email. Increased brand awareness, encourages social sharing of vouchers		x					x																
3. **Disadvantages** Eg: Significant expense, lack of customer retention, coupons intended for specific market can leak more			x				x																

	Competences																						
Content description	*a*	*b*	*c*	*d*	*e*	*f*	*g*	*h*	*i*	*j*	*k*	*l*	*m*	*n*	*o*	*p*	*q*	*r*	*s*	*t*	*u*	*v*	*w*
broadly, cost vs. low profit margin																							
4. **Overcome the barriers** eg: Process for customer retention, incentives, offer brand special exclusive deals				x			x																
5. **SMART** Specific, measurable, attainable, relevant, timely					x		x																
6. **Methods** Online numbered coupon allocation, published code and URL, number to book, online database of allocation maintained by vendor						x	x																
7. **Factors** Eg: targeted to audience, appropriate social networking site, appropriate call to action, time constraint, design, content, budget, multi-channel campaign targeting and analytics								x						x	x								
8. **Use** Eg: awareness, acquisition, retention, increased click through to website, perception change, amplification									x														
9. **Why** Less click throughs if users see the advert too often, high cost if advert is not targeted appropriately, less customer loyalty if campaign is not designed for retention, market conditions, legal conditions,										x				x	x								

Content description	Competences																						
	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w
inappropriate launch timing																							
10. **Social Networking Site** Eg: Facebook, LinkedIn, MySpace, Twitter, any other relevant site.											x	x	x	x	x								
11. **Promotional Campaigns** eg: discount coupons, special offer codes, competitions, PR																x	x	x					
12. **Factors** Vote rigging, unfair preferences, inability to control outcomes																					x		
13. **Current national and international legal and organisational guidelines** Marketing to minors, alcohol, religion, decency, discrimination, regional variations																			x	x	x	x	x

Indicative duration of assisted training

Recommended/suggested duration of training.
You can indicate it as a set value or as a "minimum – maximum" range (e.g. 2-4 hrs.).

    Content 1-6 ....10 hrs
    Content 7-10..14 hrs
    Content 11-12 .... 6 hrs
    Content 13 .... 4 hrs
    _____
    TOTAL .... **34 hrs**

Suggested strategy of delivery

Delivery can be f2f in the classroom and/or in the workplace. A Virtual Learning Environment could be used to encourage the use of blended learning.

Learners must have access to a work or realistic work environment (RWE).

Suggested strategy of assessment

Assessment is through assignment/portfolio

Candidates and centres may decide to use a paper-based or electronic method of recording evidence. City & Guilds endorses several ePortfolio systems, including their own, Learning Assistant, an easy-to-use and secure online tool to support and evidence learners' progress towards achieving qualifications. Further details are available at: www.cityandguilds.com/eportfolios

City & Guilds has developed a set of Recording forms including examples of completed forms, for new and existing centres to use as appropriate. Recording forms are available on the City & Guilds website.

Learners undertaking a Level 3 qualification will be capable of working at supervisory/ section manager level.

As part of the assessment for this qualification, learners must have access to a work or realistic work environment (RWE).

Learning support materials

City and Guilds Assessment pack

http://www.nibusinessinfo.co.uk/content/e-commerce-and-law

http://www.iabuk.net/resources/standards-and-guidelines

http://asa.org.uk/Media-Centre/2010/~/media/Files/CAP/Codes/CAP%20Digital%20Remit%20Extension.ashx

http://www.nibusinessinfo.co.uk/content/web-20-guide-business

http://www.nibusinessinfo.co.uk/content/online-business-networking-and-social-networking

http://www.nibusinessinfo.co.uk/content/social-media-business

http://www.nibusinessinfo.co.uk/content/ten-tips-using-social-media

SALES ACTIVITY

Job profile and path of skills development | Camara Oviedo (ES)

COUNTRY	Spain
JOB TITLE	**Sales Activity** - *Actividades de venta*
RETAIL SECTOR/SPECIALITY	General retail sector
COMPANY	Most companies of retail sector
DEPARTMENT	Sales department
JOB PURPOSE (short description)	This professional could works on the sales area in any productive sector: ♦ Employed by others on small, medium or large establishment in a different commercial sections. ♦ Commercialization of products or services, either self-employed or employed by others, outside of commercial establishment. ♦ In SME and industrial companies on commercial department. ♦ On the costumer department at official institutions and on industrial and commercial large companies.
REPORTS TO ("upstream" connections)	Depending on the company will report to: ♦ For SME: Commercial responsible, head of shop, head of division, General Manager. ♦ For large companies: Commercial responsible, head of shop, head of division.
MANAGES ("downstream" connections/span of control)	Depending on the company this job profile can manage a shop assistant or junior sales.
CONNECTED TO (horizontal connections)	Connections with other sales and shop assistants.
KEY RESPONSIBILITIES AND ACCOUNTABILITIES (main activities)	To implement sales activities either products or services using different commercial channels, implementing satisfactory costumer relations, achieving the established objectives for the organization and creating links that creates customer loyalty.
KEY SKILLS AND COMPETENCIES (technical/area specific skills and soft skills acquired in formal, non-formal and informal contexts)	SALES ACTIVITIES USING DIFFERENT COMMERCIALIZATION CHANNELS ♦ Be able to establish an own system for sales actions, adjusting the plan to each customer characteristics. ♦ To be able to attend customer needs based on company objectives and services. ♦ To be able to obtain an order using different commercialization channels. ♦ To be able to attend and resolve customer's claims and complains. ♦ To be able to manage and monitoring post sales process.

	ENGLISH COMMUNICATION AT INDEPENDENT LEVEL
	♦ To be able to communicate in English with costumers, understanding writing basic commercial information, writing simple documents and speaking fluently in typical situations customer / sales person.
	CUSTOMER SERVICE ACTIVITIES
	♦ To be able to provide either by phone or by electronic systems or in person, costumer requested information. ♦ To be able to manage the company's information system. ♦ To be able to participate on company quality system, analyzing needs and levels of satisfaction.
	AUXILIARY SALES ACTIVITIES
	♦ To be able to manage the wholesales applying company and law criteria. ♦ To be able to participate on the implementation of sales activities, following company criteria. ♦ To be able to report sales activities to managers, passing conclusions and suggestions. ♦ To be able to develop cashing activities, managing correctly equipments and systems, as well as assuring reliability and accuracy.
EXPERIENCE REQUIRED (years spent in the role)	Depending on each company, previous experience may be required.
EDUCATION/TRAINING/QUALIFICATIONS REQUIRED	Depending on each company, specific training may be required. Technical VET in sales is required on the majority of sales activities job vacancies.
EQF LEVEL (or other European standards)	3
NATIONAL QUALIFICATION LEVEL	2
OTHER REQUIREMENTS	Depending on each company, additional knowledge on the product, sector or service may be required. As well as, specific personal profile, like age, sex, etc. could be required. Technological skills or driving license could be also required.
CAREER DEVELOPMENT	Possibility to promotion to head of unit or sales responsible, depending on company.

SALES ACTIVITY: PATHWAY TO ATTAIN COMPETENCES

Training Unit 1. Sales Operations

Description

The aim of this unit is to learn how to carry out the sale of products or services through different commercialization channels

EQF Level

3

ECVET value

19 ECVET credits

ECTS value

6 ECTS credits

Reference to national/regional qualifications

If this unit is part of a national qualification, being its code the number MF0239_2.

This unit is also corresponding with RP1, RP2, RP3, RP4, RP5 on the Competence Unit 1 of the Professional Certificate "Sales Activities".

Learning Outcomes

At the end of this unit the learner will know:

1. Organization of Sales Procedures
   ♦ To plan the sale starting from commercial parameter defined and the company position.
   ♦ To make the basic documents produced on the sale, using the existing law and according a concrete objective.
   ♦ To carry out calculations from defined sales operations, applying adequate commercial rules.

2. Sales Techniques
   ♦ To put into practice the adequate sales techniques of products / services through different commercial channels different to internet.
   ♦ Apply techniques of conflicts resolutions and claims following the criteria and

procedures established.
   ♦ To apply procedures of after-sales service.

3. On-line Sales
   ♦ To define the variables and utilities available on Internet, in order to commercialize different products and services on-line.
   ♦ To decide commercial criteria for the design of web pages using adequate sales techniques.
   ♦ To use in on-line situations costumer service procedures, following established criteria.

Prior knowledge/experience

There is a need to accredit a level of competence on:

   ♦ Spanish language communication skills
   ♦ Mathematics skills
   ♦ Digital skills
   ♦ Social and geographic skills

As well as there is a need to be in one of this situations:

   ♦ Must hold the General Certificate of Mandatory Secondary Education
   ♦ Must hold a Professional Certificate on the same level (level 2)
   ♦ Must hold a Professional Certificate on level 1 from the same family and professional area
   ♦ Complying with academics requirements of Medium Grade VET, or to have passed the access exams
   ♦ To have passed the University access exam for older 25 or older 45
   ♦ To have the necessary training or professional knowledge those provide to achieve the training course.

Some parts of the content should be developed in a real professional environment, like simulation of

relations with customers using email, phone, internet, etc.); simulation of face to face interview with a real customer, use of real systems of after-sales procedures.

Competences

Competence description	Learning outcomes		
	1	2	3
1. Be able to establish an own system for sales actions, adjusting the plan to each customer characteristics.	X	X	
2. To be able to attend customer needs based on company objectives and services.		X	
3. To be able to obtain an order using different commercialization channels.	X	X	X
4. To be able to attend and resolve customer's claims and complains.		X	
5. To be able to manage and monitoring post sales process.		X	

Content

	Content description	Competences				
		a	b	c	d	e
CONTENT 1	1. To plan the sale starting from commercial parameter defined and the company position.	X				
	2. To make the basic documents produced on the sale, using the existing law and according a concrete objective.	X				
	3. To carry out calculations from defined sales operations, applying adequate commercial rules.			X		
CONTENT 2	1. To put into practice the adequate sales techniques of products / services through different commercial channels different to internet.		X	X		
	2. Apply techniques of conflicts resolutions and claims following the criteria and procedures established.				X	
	3. To apply procedures of after-sales service.				X	X
CONTENT 3	4. To define the variables and utilities available on Internet, in order to commercialize different products and services on-line.	X	X	X		
	5. To decide commercial criteria for the design of web pages using adequate sales techniques.			X		
	6. To use in on-line situations costumer service procedures, following			X	X	X

	established criteria.					

Indicative duration of assisted training

Content 1..60 hrs
Content 2..70 hrs
Content 3..30 hrs
TOTAL.. 160 hrs

Suggested strategy of delivery

Requirements for trainers

Minimum One of these Accreditations: Graduate, Superior Grade of VET on the professional family of Commercial and Marketing, Professional certificate level 3 on purchase and sales on the professional family of Commercial and Marketing.

Professional experience required on the training area: 2 years from people with Accreditation or 4 years for people without accreditation.

Learning Methods

It is recommended an adequate balance between theoretical and practical methods, like lectures and assignments, demonstrations, group work, dialogue, real practices, case studies, etc.

Suggested strategy of assessment

In order to provide a global assessment of learning process it is recommended a continuous assessment or **Formative assessment.** This type of assessment takes place over a period of learning or practice. It is a supportive format that is designed to give learners appropriate feedback about how well they are doing over a period of time. This feedback assists in guiding future efforts and enables you to identify when the candidate may be ready for the assessment to be conducted.

Common methods include:

Observation. The most valuable way of collecting evidence is through observation. You can do this through:

♦ demonstration
♦ simulation
♦ role play
♦ video.

Whenever you are using the observation method, you should use an observation checklist so that you can take notes of what you're observing during the assessment and refer to these notes later when making the assessment decision.

Questioning. Questioning is an important part of the assessment process, not only to help you assess underpinning knowledge and employability skills, but also to clarify or seek additional information during the assessment process. You can ask questions:

♦ during a demonstration as long as it is not disruptive
♦ at the end of training
♦ in the form of a written or oral test.

Product and/or process. A final product and/or process that candidates complete is an excellent way to prove competency. However, it is not always easy to do. Here are some things you can use to help you gather evidence.

♦ portfolio of evidence
♦ a structured interview
♦ a third party report
♦ a sample of a finished product.

Learning support materials

It will be provided accurate documents based on the unit contents will be developed for this training unit, including specific exercises, extra information, videos and simulation cases.
Book reference:

- VV.AA, Madrid 2012. ORGANIZACION DE PROCESOS DE VENTA. FAMILIA PROFESIONAL COMERCIO Y MARKETING. CERTIFICADOS DE PROFESIONALIDAD. Editorial MAD.
- VV.AA, Madrid 2012. ORGANIZACION DE PROCESOS DE VENTA. FAMILIA PROFESIONAL COMERCIO Y MARKETING. CERTIFICADOS DE PROFESIONALIDAD. Editorial ADAMS.

Training Unit 2. Auxiliar Sales Operations

Description

The aim of this unit is to learn how to carry out the sale of products or services through different commercialization channels

EQF Level

3

ECVET value

16 ECVET credits

ECTS value

5 ECTS credits

Reference to national/regional qualifications

If this unit is part of a national qualification, being its code the number MF0240_2.

This unit is also corresponding with RP1, RP2, RP3, RP4 on the Competence Unit 4 of the Professional Certificate "Sales Activities".

Learning Outcomes

At the end of this unit the learner will know:

1. Sales Supplies and Storage
   - Apply techniques for wholesale management and organization from different commercial establishment, using previous criteria defined.

2. Product presentation on the sales point
   - Apply organization and implementation procedures on a physical sales point using previous criteria defined.
   - Elaborate reports from sales activities, according with pre-defined objectives
   - Apply packaging techniques according with pre-defined criteria

3. Cash operation on sales
   - Apply register and cashing procedures on sales operations, using equipments and adequate techniques
   - Be able to differentiate characteristics on systems and means payment, on different sales operations.

Prior knowledge/experience

It is need to accredit a level of competence on:

- Spanish language communication skills
- Mathematics skills
- Digital skills
- Social and geographic skills

As well as is needed to be in one of this situations:

- Must hold the General Certificate of Mandatory Secondary Education
- Must hold a Professional Certificate on the same level (level 2)
- Must hold a Professional Certificate on level 1 from the same family and professional area
- Complying with academics requirements of Medium Grade VET, or to have passed the access exams
- To have passed the University access exam for older 25 or older 45
- To have the necessary training or professional knowledge those provide to achieve the training course.

Some parts of the content should be developed in a real professional environment, like simulation of relations with customers using email, phone, internet, etc.); simulation of face to face interview with a real customer, use of real systems of after-sales procedures.

Competences

	Learning outcomes		
Competence description	*1*	*2*	*3*
A. To be able to manage the wholesales applying company and law criteria.	X		
B. To be able to participate on the implementation of sales activities, following company criteria.		X	
C. To be able to report sales activities to managers, passing conclusions and suggestions.		X	
D. To be able to develop cashing activities, managing correctly equipments and systems, as well as assuring reliability and accuracy.			X

Content

		Competences			
	Content description	*a*	*b*	*c*	*d*
CONTENT 1	1. Apply techniques for wholesale management and organization from different commercial establishment, using previous criteria defined.	X			
CONTENT 2	2. Apply organization and implementation procedures on a physical sales point using previous criteria defined.		X		
	3. Elaborate reports from sales activities, according with pre-defined objectives			X	
	4. Apply packaging techniques according with pre-defined criteria		X		
CONTENT 3	5. Apply register and cashing procedures on sales operations, using equipments and adequate techniques				X
	6. Be able to differentiate characteristics on systems and means payment, on different sales operations.				X

Indicative duration of assisted training

Recommended/suggested duration of training.

Content 1..40 hrs
Content 2..60 hrs
Content 3..40 hrs
TOTAL.. 140 hrs

Suggested strategy of delivery

Requirements for trainers:

Minimum One of these Accreditations: Graduate, Superior Grade of VET on the professional family of Commercial and Marketing, Professional certificate level 3 on purchase and sales on the professional family of Commercial and Marketing.

Professional experience required on the training area: 2 years from people with Accreditation or 4 years for people without accreditation.

Learning Methods

It is recommended and adequate balance between theoretical and practical methods, like lectures and assignments, demonstrations, group work, dialogue, real practices, case studies, etc.

Suggested strategy of assessment

In order to provide a global assessment of learning process it is recommended a continuous assessment or **Formative assessment.** This type of assessment takes place over a period of learning or practice. It is a supportive format that is designed to give learners appropriate feedback about how well they are doing over a period of time. This feedback assists in guiding future efforts and enables you to identify when the candidate may be ready for the assessment to be conducted.

Common methods include:

Observation. The most valuable way of collecting evidence is through observation. You can do this through:
- demonstration
- simulation
- role play
- video.

Whenever you are using the observation method, you should use an observation checklist so that you can take notes of what you're observing during the assessment and refer to these notes later when making the assessment decision.

Questioning. Questioning is an important part of the assessment process, not only to help you assess underpinning knowledge and employability skills, but also to clarify or seek additional information during the assessment process. You can ask questions:

- during a demonstration as long as it is not disruptive
- at the end of training
- in the form of a written or oral test.

Product and/or process. A final product and/or process that candidates complete is an excellent way to prove competency. However, it is not always easy to do. Here are some things you can use to help you gather evidence.

- portfolio of evidence
- a structured interview
- a third party report
- a sample of a finished product.

Learning support materials

It will be provided accurate documents based on the unit contents will be developed for this training unit, including specific exercises, extra information, videos and simulation cases.
Book reference:
- VV.AA, Madrid 2012. ORGANIZACION DE PROCESOS DE VENTA. FAMILIA PROFESIONAL COMERCIO Y MARKETING. CERTIFICADOS DE PROFESIONALIDAD. Editorial MAD.
- VV.AA, Madrid 2012. ORGANIZACION DE PROCESOS DE VENTA. FAMILIA PROFESIONAL COMERCIO Y MARKETING. CERTIFICADOS DE PROFESIONALIDAD. Editorial ADAMS.

Training Unit 3. Customer/Client/User Service and Information

Description

The aim of this unit is to learn how to carry out the customer/client/user service

EQF Level

3

ECVET value

14 ECVET credits

ECTS value

5 ECTS credits

Reference to national/regional qualifications

If this unit is part of a national qualification, being its code the number MF0241_2.

This unit is also corresponding with RP1, RP2, RP3 on the Competence Unit 3 of the Professional Certificate "Sales Activities".

Learning Outcomes

At the end of this unit the learner will:

1. Customer Service Management
   - To analyse the company characteristics in order to transmit the adequate image.
   - Apply adequate procedures in order to obtain the needed information on management quality control on the services provided by the company.

2. Costumer Service Information Techniques
   - Apply communication techniques in different situations for customer service

- Apply information organization techniques, both manual and computing.
- To manage on user level computing programs for customer control, following and data base; applying procedures that guaranteed the security, integrity, availability and confidentiality, concerning storage information.

Prior knowledge/experience

It is need to accredit a level of competence on:

- Spanish language communication skills
- Mathematics skills
- Digital skills
- Social and geographic skills

As well as is needed to be in one of this situations:

- Must hold the General Certificate of Mandatory Secondary Education
- Must hold a Professional Certificate on the same level (level 2)
- Must hold a Professional Certificate on level 1 from the same family and professional area
- Complying with academics requirements of Medium Grade VET, or to have passed the access exams
- To have passed the University access exam for older 25 or older 45
- To have the necessary training or professional knowledge those provide to achieve the training course.

Some parts of the content should be developed in a real professional environment, like simulation of relations with customers using email, phone, internet, etc.); simulation of face to face interview with a real customer, use of real systems of after-sales procedures.

Competences

	Learning outcomes	
Competence description	*1*	*2*
A. To be able to provide either by phone or by electronic systems or in person, costumer requested information.		X

B. To be able to manage the company's information system.		X	X
C. To be able to participate on company quality system, analyzing needs and levels of satisfaction.		X	X

Content

		Competences		
	Content description	a	b	c
CONTENT 1	1. To analyse the company characteristics in order to transmit the adequate image.	X		
	2. Apply adequate procedures in order to obtain the needed information on management quality control on the services provided by the company.	X		
CONTENT 2	3. Apply communication techniques in different situations for customer service	X		
	4. Apply information organization techniques, both manual and computing.		X	X
	5. To manage on user level computing programs for customer control, following and data base; applying procedures that guaranteed the security, integrity, availability and confidentiality, concerning storage information.		X	

Indicative duration of assisted training

Recommended/suggested duration of training.

Content 1..60 hrs
Content 2..50 hrs
TOTAL.. 110 hrs

Suggested strategy of delivery

Requirements for trainers:

Minimum One of these Accreditations: Graduate, Superior Grade of VET on the professional family of Commercial and Marketing, Professional certificate level 3 on purchase and sales on the professional family of Commercial and Marketing.

Professional experience required on the training area: 2 years from people with Accreditation or 4 years for people without accreditation.

Learning Methods

It is recommended and adequate balance between theoretical and practical methods, like lectures and assignments, demonstrations, group work, dialogue, real practices, case studies, etc.

Suggested strategy of assessment

In order to provide a global assessment of learning process it is recommended a continuous assessment or **Formative assessment.** This type of assessment takes place over a period of learning or practice. It is a supportive format that is designed to give learners appropriate feedback about how well they are doing over a period of time. This feedback assists in guiding future efforts and enables you to identify when the candidate may be ready for the assessment to be conducted.

Common methods include:

Observation. The most valuable way of collecting evidence is through observation. You can do this through:
   ♦ demonstration

♦ simulation
♦ role play
♦ video.

Whenever you are using the observation method, you should use an observation checklist so that you can take notes of what you're observing during the assessment and refer to these notes later when making the assessment decision.

Questioning. Questioning is an important part of the assessment process, not only to help you assess underpinning knowledge and employability skills, but also to clarify or seek additional information during the assessment process. You can ask questions:

♦ during a demonstration as long as it is not disruptive
♦ at the end of training
♦ in the form of a written or oral test.

Product and/or process. A final product and/or process that candidates complete is an excellent way to prove competency. However, it is not always easy to do. Here are some things you can use to help you gather evidence.

♦ portfolio of evidence
♦ a structured interview
♦ a third party report
♦ a sample of a finished product.

Learning support materials

It will be provided accurate documents based on the unit contents will be developed for this training unit, including specific exercises, extra information, videos and simulation cases.
Book reference:
♦ VV.AA, Madrid 2012. ORGANIZACION DE PROCESOS DE VENTA. FAMILIA PROFESIONAL COMERCIO Y MARKETING. CERTIFICADOS DE PROFESIONALIDAD. Editorial MAD.
♦ VV.AA, Madrid 2012. ORGANIZACION DE PROCESOS DE VENTA. FAMILIA PROFESIONAL COMERCIO Y MARKETING. CERTIFICADOS DE PROFESIONALIDAD. Editorial ADAMS.

Training Unit 4. Professional English for Sales Activities

Description

The aim of this unit is to be able to communicate in English as independent user on sales activities area.

EQF Level

3.

ECVET value

10 ECVET credits

ECTS value

2 ECTS credits

Reference to national/regional qualifications (where applicable)

If this unit is part of a national qualification, being its code the number MF1002_2.

This unit is also corresponding with RP1, RP2, RP3, RP 4, RP5 on the Competence Unit 4 of the Professional Certificate "Sales Activities".

Learning Outcomes (generally 3 to 6)

At the end of this unit the learner will:

1. To interpret the information from oral speech, on standard language in different situation with customers.
2. To interpret effectively relevant information content on written texts or basic commercial documents, using interpretative tools and adequate information sources.
3. To produce speak messages in different situation on customer relation in order to satisfy his needs.
4. To write and to fill out basic commercial documents, using interpretative tools and adequate information sources.
5. To interact speaking with fluency in customer interpersonal communication relationship situations.

Prior knowledge/experience

It is need to accredit a level of competence on:

♦ Spanish language communication skills
♦ Mathematics skills
♦ Digital skills
♦ Social and geographic skills

As well as is needed to be in one of this situations:

♦ Must hold the General Certificate of Mandatory Secondary Education
♦ Must hold a Professional Certificate on the same level (level 2)
♦ Must hold a Professional Certificate on level 1 from the same family and professional area
♦ Complying with academics requirements of Medium Grade VET, or to have passed the access exams
♦ To have passed the University access exam for older 25 or older 45
♦ To have the necessary training or professional knowledge those provide to achieve the training course.

Some parts of the content should be developed in a real professional environment, like simulation of relations with customers using email, phone, internet, etc.); simulation of face to face interview with a real customer, use of real systems of after-sales procedures.

Competences

Competence description	Learning outcomes				
	1	2	3	4	5
A. To be able to communicate in English with costumers, understanding writing basic commercial information.	X				

Description	a	b	c	d	e
B. Writing and interpret simple information from basic commercial documents, using if it is needed the dictionary.		X			
C. Speaking fluently promoting customer relationship both in person and on distance situations.			X		
D. Writing simple messages and basic documents suitable on sales activities				X	
E. Speaking with fluency in customer interpersonal communication situations					X

Content

Content description	Competences				
	a	b	c	d	e
1. To interpret the information from oral speech, on standard language in different situation with customers.	X				
2. To interpret effectively relevant information content on written texts or basic commercial documents, using interpretative tools and adequate information sources.		X			
3. To produce speak messages in different situation on customer relation in order to satisfy his needs.			X		
4. To write and to fill out basic commercial documents, using interpretative tools and adequate information sources.				X	
5. To interact speaking with fluency in customer interpersonal communication relationship situations.					X

Indicative duration of assisted training

Recommended/suggested duration of training.
Content 1..60 hrs
TOTAL...60 hrs

Suggested strategy of delivery

Requirements for trainers:

Minimum One of these Accreditations:

English Philology Degree, English Translation and Interpretation Degree.

Any High Education with one of these complementary training:

- Having passed a cycle for leading:

- ♦ English Philology Degree
- ♦ English Translation and Interpretation Degree
- ♦ Equivalent education
- Official Language Schools Certificate in English Advance level.

- University Studies developed on English countries

Mandatory professional experience required on the training area: 2 years.

Learning Methods

It is recommended and adequate balance between theoretical and practical methods, like lectures and assignments, demonstrations, group work, dialogue, real practices, case studies, etc.

Suggested strategy of assessment

In order to provide a global assessment of learning process it is recommended a continuous assessment or **Formative assessment.** This type of assessment takes place over a period of learning or practice. It is a supportive format that is designed to give learners appropriate feedback about how well they are doing over a period of time. This feedback assists in guiding future efforts and enables you to identify when the candidate may be ready for the assessment to be conducted.

Common methods include:

Observation. The most valuable way of collecting evidence is through observation. You can do this through:
- ♦ demonstration
- ♦ simulation
- ♦ role play
- ♦ video.

Whenever you are using the observation method, you should use an observation checklist so that you can take notes of what you're observing during the assessment and refer to these notes later when making the assessment decision.

Questioning. Questioning is an important part of the assessment process, not only to help you assess underpinning knowledge and employability skills, but also to clarify or seek additional information during the assessment process. You can ask questions:

- ♦ during a demonstration as long as it is not disruptive
- ♦ at the end of training
- ♦ in the form of a written or oral test.

Product and/or process. A final product and/or process that candidates complete is an excellent way to prove competency. However, it is not always easy to do. Here are some things you can use to help you gather evidence.

- ♦ portfolio of evidence
- ♦ a structured interview
- ♦ a third party report
- ♦ a sample of a finished product.

Learning support materials

It will be provided accurate documents based on the unit contents will be developed for this training unit, including specific exercises, extra information, videos and simulation cases.
Book reference:
- ♦ Madrid 2012, Sara Belén López Aranda, Elisa Gracia González Lara. Inglés profesional para actividades comerciales + cd. Editorial IC.
- ♦ VV.AA, Madrid 2012. Inglés profesional para actividades de venta. Editorial ADAMAS.
- ♦ VV.AA, Madrid 2012. Inglés profesional para actividades de venta. Editorial MAD.

SHELVING SELF SERVICE

Job profile and path of skills development | INSUP (FR)

PROFESSIONAL PROFILE	
COUNTRY	FRANCE
JOB TITLE	**Shelving self service** (Warehouse man)
RETAIL SECTOR/SPECIALITY	ALL
COMPANY	Hyper, superstores, hyper, supermarkets
DEPARTMENT	ALL
JOB PURPOSE (short description)	Performs shelving (installation, marking, labeling ...) of food (fresh and excluding expenses) or non-food products in the sales area according to the regulation of trade, business objectives of the company and the rules hygiene and safety. Can perform the collection of products or articles.
REPORTS TO ("upstream" connections)	head of department, shop manager, merchandiser, logistic manager
MANAGES ("downstream" connections/span of control)	Nobody
CONNECTED TO (horizontal connections)	Others shelving self service, suppliers
KEY RESPONSIBILITIES AND ACCOUNTABILITIES (main activities)	♦ Receive goods, products and monitor compliance with delivery ♦ Route-products for shelving and installing top of gondolas on the shelves according to the facing plan ♦ Perform / monitor the marking and labeling of products on the shelves ♦ Track inventory, identifying supply needs and carry out orders ♦ Perform maintenance and cleaning of the sales area and products on shelves ♦ Check the condition and preservation of perishable products and remove the products unfit for sale
KEY SKILLS AND COMPETENCIES (technical/area specific skills and soft skills acquired in formal, non-formal and informal contexts)	Theoretical and procedural knowledge Handling gestures and postures Rules for shelving Hygiene and safety rules Cold Chain Hygiene and food safety rules Use of non-motorized handling equipment (transpallet, carts ...) Use of inventory management software Using optical devices for reading barcodes (gun, flasher, ...) Use of cleaning equipment

	Use equipment that require authorization: • CACES R 389-1 (pallet trucks rider and order pickers on the ground) • CACES R 389-2 (trucks and tractors carrying plate capacity under 6000 kg) • CACES R 389-3 (Forklift door overhang of capacity under or equal to 6000 kg) • Check the temperature of refrigerators, cold storage, and shelf • Greet customers, identify their needs and advise on products and services Methods of food preservation Salesmanship
EXPERIENCE REQUIRED (years spent in the role)	6 month to 1 year in Shop, retail, Specialized retail trade, Large-scale retail DIY, Hypermarket (2,500 m2 +), popular Store, Supermarket (400 to 2500m2), Supermarket (120 to 400m2, Wholesale, Commercial / retail, Discount A short experience (or significative internship) can be enough to access to the position.
EDUCATION/TRAINING/QUALIFICATIONS REQUIRED	This job is accessible without a diploma or just with a short professional experience. CAP / BEP or Titre Pro ECM in marketing and sales distribution or professional experience in these sectors can facilitate access.
EQF LEVEL (or other European standards)	eq. NVQ 3
NATIONAL QUALIFICATION LEVEL	Level 5
OTHER REQUIREMENTS	One or more licences of specific lifting devices (CACES : licence for safe driving) and a good medical condition periodically renew, can be required
CAREER DEVELOPMENT	Animation sales

SHELVING SELF SERVICE: PATHWAY TO ATTAIN COMPETENCES

Training Unit 1. Supply Shelves or Shops

Description

The aim of this unit is to

- ♦ Receive the goods ; handle, control, prepare, store them in reserve/warehouse or install them on shelves
- ♦ Fill the shelves according to the rules of implementation, the health and safety instructions and the commitments of the company in terms of sustainable development.
- ♦ Participate in inventory tracking and contribute to the validation controls by performing counts and audits

EQF Level

3

ECVET value

60

ECTS value

60

Reference to national/regional qualifications

Réf. RNCP (national register of professional certification) « Titre Professionnel employé commercial en magasin »

http://www.rncp.cncp.gouv.fr/grand-public/visualisationFiche?format=fr&fiche=8812

Learning Outcomes

At the end of this unit the learner will know:

1- RECEIVING AND HANDLING

- ♦ Receive and control the goods
- ♦ Handling goods

2- STORAGE

- ♦ know and understand rules of storage

3- PREPARE THE GOODS FOR THE SHOP

- ♦ Fill the shelves according to the rules of implementation, the health and safety instructions and the commitments of the company in terms of sustainable development.

Specific Knowledge :

- - equipment and organisation of a storage area
- - goods supports and containing
- - safety and security rules in shops and storage area : premises, equipment, staff, foods
- - safety and security rules in shops and storage area : In case of fire, serious incidents, risk prevention in handling
- - rules of ecological sorting
- - Legal proceedings relating to food products (cold chain, luggage storage and logistics, traceability, dates consumption limits) and non-food products (standards, origin of products)
- - types of labeling and theft by products.

4- PREPARE PRODUCTS FOR SHELVING

- ♦ Take the products, unpack and prepare it before put in the shelves

5- SHELVING

- ♦ Prepare the display to improve the products commercial attractiveness

Specific Knowledge :

- - Rules and regulation of product prices
- - Rules of the mark-up and shop location

- Specific labelling of BIO products / sustainable development
- Ecological sorting of waste and empty containers
- Requirements for the safety of persons working in contact with foodstuffs, risk analysis and Guides to Good Practice

6- STOCK CONTROL

- ♦ Participate in inventory tracking and contribute to the validation controls by performing counts and audits

Specific Knowledge :

- 4 arithmetic operating
- out : definition, risks, breakage management,
- how to inventory
- use IT tools

Prior knowledge/experience

Knowledge :

- ♦ Key competencies (4 arithmetic operations, read, write).
- ♦ Any formal training eq. EQF 3.
- ♦ Level of general knowledge + basic terms on trade vocabulary

Experience :

- ♦ short experience in shops (traineeship, summer jobs) in handling, selling activities, warehouse, cashier

Assessment method : MCQ, interview, assessment on workplace, observation performed by the manager (qualitative and quantitative results) + social skills

Links with other units/elements

All the TU is linked with the unit:

1. SUPPLYING A SHOP OR A SHELVING

    a- Receive the goods ; control, prepare, store the goods in storeroom/warehouse or install them on shelves

    b- Fill the shelves according to regulations, health and safety instructions and the company commitments/policy in terms of sustainable development.

    c- Participate in stock control and contribute to the validation controls by performing counts and audits.

Users are strongly advised to read

- ♦ the description of the global training before on the RNCP.
- ♦ Job description (ROME)

Competences

Competence description	Learning outcomes					
	1	2	3	4	5	6
a. Use documents for receiving goods (know docs and use it)	X					
b. Control delivery : qualitative and quantitative control with actual tools	X					
c. support delivery problems	X					
d. load and unload goods handle	X					

(with Fork-lift truck or handling) in application of safety and security rules							
e. Be able to store in accordance to the rules of storage		X					
f. Record the goods in the stock		x					
g. prepare the supplying for the shelves according to the inventory turnover, route the goods to the shop / commercial area				X			
h. Prepare the display to improve the products commercial attractiveness						X	
i. Perform filling linear within the rules of installation (facing)							X
j. Perform product turnover, perform the facings and check the markup							X
k. Participate in inventory tracking								x
l. Participate in the fight against shrinkage								X

Content

	Competences											
Content description	*a*	*b*	*c*	*d*	*e*	*f*	*g*	*h*	*i*	*j*	*k*	*l*
1. know orders lines, delivery orders, reception orders, technical specifications, (paper documents and dematerialized documents)	x											
2. control, put the labels and padlocks on the goods												
3. use gencode, RFID, control the conformity between delivery order and real stock		x										
4. handle goods with or without mechanicals tools				X			X					
5. know and respect handle symbols, stock symbols, rules for safety driving in reserve					X							
6. know and apply handle safety and security												

rules											
7. sort, store, classify goods				X							
8. use the tools gencod, optical tools					X						
9. take goods in the stock and organize palett in the order of the implementation on the shelves							X				
10. Unpack products						X					
11. Check continuously the presence of products at the point of sale						X					
12. clean supports with appropriated tools and products							X				
13. use the appropriate facing equipment								X			
14. verify conformity between the products and the shelves needs						X					
15. Apply legal procedures relating to the compliance of food products									X		
16. Apply safety rules for goods and people on the commercial area									X		
17. Follow the instructions of the company in terms of sustainable development and eco-citizenship									X		
18. Apply the ecological rules of sorting waste and empty containers									X		
19. Perform stocks control by count and audit products with IT tools										X	
20. Control the packages (check the sets)										X	
21. Inform the manager on the errors stock (overstock, out of stock, quality problem on the goods)										X	
22. Assist in the preparation and validation of orders using management schedules commands										X	
23. Deals with the problems of breakage, and record shrinkage											X
24. identify known markdowns and anticipate unknown markdowns											X

Indicative duration of assisted training

Receiving and handling the goods ....30-35 hrs*

Storage ....30-35 hrs*

Prepare the goods for the shop ....20-30 hrs*

Prepare products for shelving ....20-30 hrs*

Shelving...15-20 hrs*

Stock control ....15-20 hrs*

TOTAL .... 130-170 hrs*

(indicative duration asked for the certification)

Suggested strategy of delivery

Theorical knowledge : rules of safety and security (goods, products, staff, customers, food, etc.)

Visit storage area with a tutor

Global vision on the inventory shrinkage (costs, legal consequences…)

Participate on commercial and promotional operations

Perform the facing, shelving, count and inventory of the stocks, handling with security posture, prepare orders with scheduler

Suggested strategy of assessment

They should include a wide range of methods and tools.

Assessment criteria must also include precise performance criteria, and provide evidence of learning outcomes.

- ♦ Observation on the workplace (performed by the manager)
- - social behaviour with the staff, the customers, hierarchical responsible
- - qualitative and quantitative work indicators
- - follow instructions

- - motivation, autonomy, initiative in the work
- ♦ Interview
- - motivation in the work,
- - feeling of competence (what sort of contribution the new employee needs, what sort of activities he feels better or not)
- ♦ Tests
- - All "specific knowledge" mentioned in the document
- ♦ Assessment in working situation
- ♦ Other
- - Draft a report on a professional situation

Learning support materials

Workshop

- ♦ professional rack (1,20 m * 5 shelves)
- ♦ goods and products : grocery, general department
- ♦ containers
- ♦ internal documents : orders, delivery orders, inventory form, product datasheet, bill, commercial plan, promotional schedule, product catalogue, commercial flyers

Others

- ◆ storage : photos of storage area, storage units, racks,

- ◆ shop : photos of shops, shelves, facing

- ◆ put on shelves : products display (bulk display, point-of-sale advertising)

- ◆ professional press

- ◆ professional flyers and documents of the national institute risk prevention

- ◆ training description (RNCP)

Additional notes

The Ministry of labor strongly recommend to the trainers develop additional skills and knowledge on:

- ecological and sustainable development skills and behavior in large scale retail

- rights and duties on the workplace

Training Unit 2. Counseling Customers, participate in the commercial attractiveness of the shelves or the shop

Description

The aim of this unit is to

- Greet, inform, guide and serve the customers on the sales area
- Display and highlight the products to expand sales.
- Record sales and cash

EQF Level

3

ECVET value

60

ECTS value

60

Reference to national/regional qualifications

Réf. RNCP (national register of professional certification) « Titre Professionnel employé commercial en magasin »

http://www.rncp.cncp.gouv.fr/grand-public/visualisationFiche?format=fr&fiche=8812

Learning Outcomes

At the end of this unit the learner will know how to:

1- WELCOME AND INFORM CUSTOMERS

2- ADVICE AND SERVE CUSTOMERS

3- HIGHLIGHT PRODUCTS FOR EXPAND SALES

- Display, stage products
- Highlight promotions and new products

4- RECORD SALES AND CASH

Prior knowledge/experience

(eq. 1st TU)

Links with other units/elements

All the TU is linked with the unit:

1. WELCOME AND ADVICE CUSTOMERS
2. RECORD SALES AND CASH

Competences

Competence description	Learning outcomes			
	1	2	3	4
a. Welcome the customer in the store: adopt an attitude and a commercial behaviour	X			
b. Inform and direct: listen to the customers and know how to direct them	X			
c. Present products (advise customers)		X		
d. Serve the customer with a vocabulary adapted to the type of store		X		
e. Apply the basic rules of the sale in the store		X		

f. Promote the advantages and the services of the store /shop		X		
g. Take care of the current complaints of the customers		X		
h. Pack fragile products and make packages for the gifts		X		
i. Promote the advantages and the services of the company		X		
j. Participate in the display of products: adapt the techniques of display to the nature of products			X	
k. Highlight the promotions and the new products			X	
l. Perform the display chart of the company (facing)			X	
m. Participate in the implementation of the commercial and promotional operations			X	
n. Inform the managers about all information collected with the customers and the competitors			X	
o. Apply the basic rules of the customer welcome in cash register: kindness, smile and courtesy				X
p. Use a terminal of payment				X
q. Register and cash with the various means of payment: identify them, apply control procedures, give change				X
r. Follow the instructions to reduce frauds: vigilance, apply the procedures of safety in cash register and anticipate the sources of fraud				X

Content

Content description	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r
1. interpersonal communication : schema of communication, verbal and non-verbal communication various register of language, bases of active listening	X	X	X	X	X		X											
2. use various ways and tools in transmission of the information (phone, mail)	X																	
3. communication with customers (commercial attitudes) : customer behaviour, ways of welcome (reception), missions of welcome, information	X	X	X	X	X	X	X											
4. communication with customers (approach of the sales) : relations between needs and products, understand customer behaviour (motivation, price customer is agree to pay, mark, responsible purchases, sales arguments)		X	X		X	X	X											
5. know the basic principles of the progress of the sale : welcome, first contact, orientation, understand customer needs, display of products, argumentation and demonstration, additional sales, conclusion of the sale and how to			X		X		X											

Content description	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r
leave																		
6. argue on verbal incidents							X											
7. techniques of packaging for the products and gifts								X										
8. Know advantages and departments of the shop									X									
9. rules of merchandising, hot zones / cold zones, direction of traffic in the shop, notion of assortment										X	X	X	X					
10. know various techniques for display the products : additional, products, showcase, tasting, bundle, podium, island, end-aisle display…										X	X	X	X					
11. promotion schedule, seasonality of sales										X	X	X	X					
12. basic items of commercial legislation : display price, advertising											X	X	X					
13. know the principle of eco participation, energy labelling of products											X		X					
14. technique of welcome in cash, conflicts management															X			
15. Use various payment condition																X		
16. technical equipment : cash register, balance, etc.																X	X	

Content description	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r
17. specific documents of cash register																X	X	
18. various way of payment : cards, cash																X	X	
19. invoice, receipt																X	X	
20. rates of VAT																X	X	
21. controls and check lists at cash register : prices, antitheft system, theft, specific communication with tactless customers															X			X

Indicative duration of assisted training

Welcome and inform customers...30-33 hrs*

Advice and serve customers ....30-34 hrs*

Highlight products for expand sales...20-33 hrs*

Records sales and cash..20-33 hrs*

TOTAL .... **100-135 hrs***

(indicative duration asked for the certification)

Suggested strategy of delivery

Theoretical learning : interpersonal communication, Commercial interactions, Customer behaviour, Commercial behaviour, Progress of a sale, rules of merchandising, basic items of commercial legislation

Visit and observations with a tutor : promotional operation, shelves and promotional displays / facing

Participation on commercial and promotional operations

Perform the facing, shelving, count and inventory of the stocks, handling with security posture, prepare orders with scheduler

Perform with a tutor : all cashier tasks

Suggested strategy of assessment

- ♦ Observation on the workplace (performed by the manager)
- - commercial behaviour : welcome, information, conflict management, motivation and dynamism in interpersonal communication, etc.
- ♦ Interview
- ♦ Tests
- ♦ Assessment in working situation : organize a display, management of customer complaints, cashing
- ♦ Other
- -

- Draft a report on a professional situation : sales and participation on a promotional operation

Learning support materials

- ♦ goods and products : grocery, general department
- ♦ displays
- ♦ cash register, money (artificial)
- ♦ specific cash documents (receipt, tickets of credit cards, invoices)

Others:

- ♦ shop : photos of shops, shelves, facing
- ♦ put on shelves : products display (bulk display, point-of-sale advertising)
- ♦ professional press
- ♦ training description (RNCP CCP 2)

Additional notes

If the trainer wants to attempt a professional certification, we strongly recommand to draft reports with notes, internship reports, documents and proofs (photos of professional realizations for example) for every typical activity.

The draft will describe tasks, frequency, realizations and the context of realization.

Special additional training units on :

- ICT

- Business English

- Professional environment

can complete this training program.

SALES MANAGER

Job profile and path of skills development | AVM (LT)

COUNTRY	Lithuania
JOB TITLE	**Sales manager** - *Prekybos vadybininkas*
RETAIL SECTOR/SPECIALITY	Retail jobs
COMPANY	Retail store or shop; trading company; any company sales department
DEPARTMENT	Sales department
JOB PURPOSE (short description)	Retail store or shop; trading company; any company sales department
REPORTS TO ("upstream" connections)	Head of sales department or other employer of higher qualification or job position.
MANAGES ("downstream" connections/span of control)	Lower-qualification employees.
CONNECTED TO (horizontal connections)	A sales manager is connected to other managers.
KEY RESPONSIBILITIES AND ACCOUNTABILITIES (main activities)	A sales manager performs the activities independently and is supervised only as regards the evaluation of results. The activity tasks are set by an employee of a higher qualification (head of department), who frequently grants the employee performing the activities the discretion as to the choice of methods and measures to complete the tasks.
KEY SKILLS AND COMPETENCIES (technical/area specific skills and soft skills acquired in formal, non-formal and informal contexts)	**Technical/area specific skills and competencies** *Knowledge* ♦ Knowing of legal, regulatory, ethical and social requirements pertaining to the sales function ♦ Understanding how to manage the sales function in a way that complies with legislation ♦ Knowing how to deal with non-compliance ♦ Understanding in buying practices of customers and customer support issues ♦ Understanding own organization's unique business value ♦ Understanding how a marketing strategy supports the sales function, the use of marketing research in sales and the marketing research ♦ Understanding forecasting in relation to sales targets and in own organization ♦ Understanding sales territory design, planning, management and factors that affect territory management ♦ Understanding how to build relationships, how to use networking in sales, how to use consultative

selling, when and how to undertake stakeholder analysis and how to monitor and control customer relationships
- ♦ Understanding the principles of bid and tender management and how to follow up the tendering of the bid
- ♦ Understanding product portfolio development and how to contribute to the development of a product portfolio

Skills
- ♦ Ability to use market analyses in sales
- ♦ Ability to progress sales through alignment with marketing strategies
- ♦ Ability to forecast sales, to set sales targets and objectives and devise measurement activities to monitor them
- ♦ Ability to review motivation and compensation for own sales team
- ♦ Ability to review and revise territory plans and to resource sales territories
- ♦ Ability to use financial tools to assess and prioritize new accounts and measure potential value
- ♦ Ability to follow the organizations' management accounting procedures
- ♦ Ability to evaluate financial risks
- ♦ Ability to prepare for a bid, to write a bid and to tender a bid to the customer
- ♦ Ability to analyze the product portfolio.

Soft skills
- ♦ Understanding, motivation and compensation for sales teams and individuals
- ♦ Understanding the principles of coaching and mentoring
- ♦ Ability to plan, deliver and evaluate a coaching or mentoring program
- ♦ Understanding principles of leadership
- ♦ Knowing how to build trust between self and team, how to share own vision with team, how to focus team members to complete tasks and achieve objectives, how to create accountability in team members and how to maintain alignment of own actions with team and organization
- ♦ Ability independently perform activity under conditions of constantly changing technological and organizational requirements, while changes are often unpredictable
- ♦ Ability to supervise the activities of lower-qualification staff, to verify the performance quality, train them and evaluate their acquired competences.

Key skills and competencies can be acquired in formal, non-formal and informal way.

EXPERIENCE REQUIRED (years spent in the role)	Preferably 1 year of experience in a professional area.
EDUCATION/ TRAINING/ QUALIFICATIONS REQUIRED	EQF Level 4
EQF LEVEL (or other European standards)	EQF Level 5
NATIONAL QUALIFICATION LEVEL	LTQF Level 5
OTHER REQUIREMENTS	Honesty, helpfulness, responsibility. Good mental and physical health (stamina, coordination, agility, attention, concentration, language fluency, etc.).
CAREER DEVELOPMENT	The qualifications provide opportunities for progression to other qualifications at the same or higher levels and they support learners in meeting the knowledge and skills requirements for employment within sales. Learners can progress to level 6 qualifications.

SALES MANAGER: PATHWAY TO ATTAIN COMPETENCES

Training Unit 1. Sales Manager (Level 5)

Description

The program designed is for professional education Level 5 (EQF and LTQF) for sales managers in retail business, specifically for those employees working or planning their career development in a trading company, store or shop or any trading company sales department.

The program covers 120 ECTS and is built of 12 training units (TU). A unit is defined as a coherent and explicit set of learning outcomes and assessment criteria with a title, credit value and level. Units share a common set of characteristics and can be used separately or be combined to support the creation of coherent programs of learning.

Within this set of units, learners will have the opportunity to build their achievements from a single unit, leading to a **Certificate** up to a composite qualification leading to a **Diploma**.

Two learning pathways - formal and non-formal - are recommended, depending on the learners prior knowledge, experience and choice for progression. These learning paths are designed to suit learners working towards level 5 qualification.

RPL is recommended in case of informal learning. Learners may apply to claim for credit transfer and exemption where they have completed relevant units and qualifications from other awarding organizations. Credit transfer will be based on confirmation of achievement of the units.

EQF Level

5

ECVET value

ECVET system introduction in vocational education has only been commenced. ECVET introduction is planned from the year 2014.

ECTS value

120 ECTS

Reference to national/regional qualifications (where applicable)

- Description of Lithuanian qualifications framework. Decree of Government of Republic of Lithuania, 2010: http://www.kpmpc.lt/LTKS_EKS/LTQF_official_translation.pdf
- Referencing the Lithuanian Qualifications Framework to the EQF and the QF-EHEA. National report: http://www.kpmpc.lt/LTKS_EKS/LTKS_EKS_ataskaita_ENG.pdf
- List of legitimated VET standards: http://www.kpmpc.lt/kpmpc/?page_id=1930
- List of currently implemented training programs (in Lithuanian): http://www.kpmpc.lt/kpmpc/?page_id=1505
- The concept of the modular vocational education and training system in English is available at: http://www.kpmpc.lt/Projektai/The%20Concept%20of%20the%20Modular%20Vocational%20Education%20and%20Training%20System.pdf
- The methodology for developing modular programmes in Lithuanian is available at: http://www.kpmpc.lt/Projektai/Moduliniu%20profesinio%20mokymo%20programu%20kurimo%20metodika.pdf
- *LTKS_EKS_Report www.skvc.lt/files/LTKS/LTKS_EKS_Ataskaita_EN.pdf*

Learning Outcomes

A learner will have comprehensive factual and theoretical knowledge within such activity areas as managing responsible selling, customer accounts,

integrated functions of sales and marketing, sales forecasts and target setting, leading a team, motivation and compensation for sales teams, coaching and mentoring, designing, planning and managing sales territories, analyzing the financial potential and performance of customer accounts, relationship management, bid and tender management, developing a product portfolio.

1. The learner will be able to manage the sales function in a way that complies with legislation; to use market analyses in sales, to progress sales through alignment with marketing strategies; to forecast sales, to set sales targets and objectives and devise measurement activities to monitor them; to review motivation and compensation for own sales team, to plan, to deliver and to evaluate a coaching or mentoring program; to review and revise territory plans, to resource sales territories; to use financial tools, to assess and prioritize new accounts and measure potential value, to follow the organization's management accounting procedures, to evaluate financial risks; to use networking in sales, consultative selling, to undertake stakeholder analysis; to prepare for a bid, to write a bid, to tender a bid to the customer; to analyze the product portfolio.

2. The learner will be able to build trust between self and team, to share own vision with team, to focus team members to complete tasks and achieve objectives, to create accountability in team members, to maintain alignment of own actions with team and organization, understand how to build relationships, to monitor and control customer relationships, independently perform activity under conditions of constantly changing technological and organizational requirements, while changes are often unpredictable; to supervise the activities of lower-qualification staff, to verify the performance quality, train them and evaluate their acquired competences.

Prior knowledge/experience

Sufficient knowledge/experience is desirable for the learners admitted to the training program as well as aptitude and ability at the right level to undertake the learning and assessment.

Within this set of units, learners will have the opportunity to build their achievements from a single unit into a composite qualification.

There will still may be instances where learners will wish to claim recognition of prior learning which has not been formally assessed and accredited. In those instances, institutions are free, after discussion and agreement, to allow these learners direct access to the relevant assessment for the unit, without unnecessary repetition of learning.

Links with other units/elements

Units in the program share a common set of characteristics and can be used separately or be combined to support the creation of coherent programs of learning.

Competences

The table below illustrates the bridging between EQF and LTQF level 5 descriptors:

LTQF level 5

LTQF level 5 descriptor		EQF level 5 descriptor
Original	**Divided into knowledge, skills and competence**	
The qualification is intended for activities distinguished by integrated coordination of activity tasks in different activity areas. The activities include the evaluation of the competences of lower-qualification employees and training thereof. The activities require coordination of comprehensive knowledge of the activity area with general knowledge in dealing with various specialised activity tasks in several different activity areas.	**Knowledge** Comprehensive factual and theoretical knowledge within different activity areas. Knowledge required in dealing with various specialised activity tasks in several different activity areas.	**Knowledge** Comprehensive, specialised, factual and theoretical knowledge within a field of work or study and an awareness of the boundaries of that knowledge.
The employee performs the activities independently and is supervised only as regards the evaluation of results. The activity tasks are set by an employee of a higher qualification, who frequently grants the employee performing the activities the discretion as to the choice of methods and measures to complete the tasks. The employee supervises the activities of lower-qualification staff, plans and assigns activity tasks, oversees the performance of the activities, provides consulting and verifies the performance quality.	**Skills** Cognitive skills cover not only the application of knowledge in a particular area of activity but also coordinating knowledge of the activity area with general knowledge. Practical skills are used to solve specialised activity tasks in several different activity areas. The individual learns to compositely coordinate task solution across different activity areas. A person of this qualification chooses task solution methods and measures.	**Skills** A comprehensive range of cognitive and practical skills required to develop creative solutions to abstract problems.
The technological and organisational requirements of the activities as well as their environment are constantly changing, the changes are often unforeseeable and may be related to new areas of activity.	**Competence** Independently perform activity under conditions of constantly changing technological and organisational requirements, while changes are often unpredictable. The individual acquires competence to supervise the activities of lower-qualification staff, to verify the performance quality, train them and evaluate their acquired competences. The activity tasks are set by an employee of a higher qualification, who frequently grants the employee performing the activities the discretion as to the choice of methods and measures to complete the tasks.	**Competence** Exercise management and supervision in contexts of work or study activities where there is unpredictable change; Review and develop performance of self and others.

http://www.svako.lt/UserFiles/File/fAILAI/LTKS_EKS_Ataskaita_ENG.pdf

Key skills and competencies

The learner will acquire technical/area specific skills and soft skills and competences.

Knowledge

- Knowing of legal, regulatory, ethical and social requirements pertaining to the sales function

- Understanding how to manage the sales function in a way that complies with legislation

- Knowing how to deal with non-compliance

- Understanding in buying practices of customers and customer support issues

- Understanding own organization's unique business value

- Understanding how a marketing strategy supports the sales function, the use of marketing research in sales and the marketing research

- Understanding forecasting in relation to sales targets and in own organization

- Understanding sales territory design, planning, management and factors that affect territory management

- Understanding how to build relationships, how to use networking in sales, how to use consultative selling, when and how to undertake stakeholder analysis and how to monitor and control customer relationships

- Understanding the principles of bid and tender management and how to follow up the tendering of the bid

- Understanding product portfolio development and how to contribute to the development of a product portfolio

Skills

- Ability to use market analyses in sales

- Ability to progress sales through alignment with marketing strategies.

- Ability to forecast sales, to set sales targets and objectives and devise measurement activities to monitor them

- Ability to review motivation and compensation for own sales team

- Ability to review and revise territory plans and to resource sales territories

- Ability to use financial tools to assess and prioritize new accounts and measure potential value

- Ability to follow the organizations' management accounting procedures

- Ability to evaluate financial risks

- Ability to prepare for a bid, to write a bid and to tender a bid to the customer

- Ability to analyze the product portfolio

Soft skills and competencies

- Understanding motivation and compensation for sales teams and individuals

- Understanding the principles of coaching and mentoring

- Ability to plan, deliver and evaluate a coaching or mentoring program

- Ability to demonstrate understanding principles of leadership

- Knowing how to build trust between self and team, how to share own vision with team, how to focus team members to complete tasks and achieve objectives, how to create accountability in team members and how to maintain alignment of own actions with team and organization

- Ability independently perform activity under conditions of constantly changing technological and organizational requirements, while changes are often unpredictable;

- Ability to supervise the activities of lower-qualification staff, to verify the performance quality, train them and evaluate their acquired competences.

Indicative duration of assisted training

Learning Hours

120 ECTS

1080 Guided Learning Hours (GLH)

2160 Independent Learning Hours (ILH)

No	Unit title	Unit level	ECTS Credits	Guided Learning Hours	Independent Learning Hours
1	Managing responsible selling	5	6	54	108
2	Understanding and developing customer accounts	5	12	108	216

3	Understanding the integrated functions of sales and marketing	5	12	108	216
4	Sales forecasts and target setting	5	10	90	180
5	Leading a team	5	10	90	180
6	Motivation and compensation for sales teams	5	10	90	180
7	Coaching and mentoring	5	10	90	180
8	Designing, planning and managing sales territories	5	10	90	180
9	Analyzing the financial potential and performance of customer accounts	5	10	90	180
10	Relationship management	5	10	90	180
11	Bid and tender management	5	10	90	180
12	Developing a product portfolio	5	10	90	180
	TOTAL		**120**	**1080**	**2160**

1 ECTS credit = 27 hours = 9 Guided Learning Hours (GLH) + 18 Independent Learning Hours (ILH)

Suggested strategy of delivery

Methods of delivery are not prescribed any to a training organization. Organizations are free to use any methods of delivery suitable to their learners. Methods may include open, distance, blended or online learning. In qualifications with more than one unit, units may be delivered and assessed in any order.

Suggested strategy of assessment

Learners will need to show that they meet each of the assessment criteria detailed within each unit and to the required standard for the level of the unit.

The assessor is responsible for assessing the learning against the assessment criteria in the unit.

Assessment routes

There are four possible routes to fulfilling the assessment criteria for each unit, and each route is equally valid:

Route A is via Work Based Evidence

Route B is via Model Assignment

Route C is via Contextualized Model Assignment

Route D is via Institution Devised Assignment.

One route must be chosen per learner per unit. In cases with more than one learner assessment may be organized for some learners through one route and other learners through another route at the same time or over a period of time. Learners taking qualifications consisting of more than one unit can provide evidence through one route for one unit and through other routes for other units. However, evidence for one unit for one learner must be from one route only.

Route A: Work based evidence

This route is available for learners employed in sales who have the opportunity to produce work based evidence showing that they have met the assessment criteria through their employment. Evidence must be generated through their day to day work and may take any format, as long as it

produces relevant tangible evidence which can be accessed by a third party.

Examples of types of evidence are:

♦ Witness statements

♦ Observations of performance in the work environment

♦ Learner statements

♦ Written evidence such as diaries, emails, reports, presentation slides

♦ Photos

♦ Video recordings

♦ Interview or viva voce

♦ Project documentation

♦ Verbal presentations.

This list is not conclusive.

Work based evidence may be built up over time and assessment criteria in the unit can be 'ticked off' gradually until they are all met. At the time of assessment against the particular assessment criterion, evidence must be current i.e. produced within the past three years. Evidence must be authentic i.e. produced by the learner.

Work based evidence should be assessed holistically, and one piece of evidence may cover more than one assessment criterion. One piece of evidence may be used for assessment across different units and across different qualifications, provided it meets the relevant assessment criteria.

Route B: Model Assignment

A Model Assignment is available for each assessed unit, which provides the learner with the opportunity to meet all the assessment criteria in the unit. The Model Assignment consists of one or more tasks, based on a fictional yet realistic sales situation. Information is to be provided to the learners on the Model Assignment, the deadlines, procedures of monitoring progress and assessing learner work against the assessment criteria.

Route C: Contextualized Model Assignment

A Contextualized Model Assignment gives the opportunity of adapting the Model Assignment, to tailor it to the needs and interests of the learners. For example, the setting of the Model Assignment may be changed from a car sales situation to a pharmaceuticals sales situation. A Contextualized Model Assignment must enable learners to meet all of the assessment criteria for the unit.

Route D: Institution Devised Assignment

Institutions can create their own Institution Devised Assignment from scratch using the Assignment Template. Institution Devised Assignment must enable the learner to meet all of the assessment criteria for the unit. The assignment may consist of one or more tasks.

Institutions choosing this route must ensure that each institution Devised Assignment:

1. permits the learner to meet all of the assessment criteria in the unit

2. is relevant to the content of the unit

3. has clear instructions to the learner as to what is expected

4. has clear instructions to the learner regarding the duration of the assignment (if it is a timed activity), and what reference or other material they may use (if any) to complete it

5. contains language free from any bias

6. contains language and technical terms at the appropriate level for the learner.

Learning support materials

Learning resources – books, periodicals and database - are included for each individual unit.

Syllabus of the units would cover various learning support aspects, including access to other learning materials on Virtual learning environment platforms.

ADMINISTRATIVE ASSISTANT

Job profile and path of skills development | IFOA (IT)

COUNTRY	Italy
JOB TITLE	**Administrative assistant** (Secretary personnel; accountants assistants and similar)
RETAIL SECTOR/SPECIALITY	Large scale retail - food/no food
COMPANY	Any
DEPARTMENT	Departments of Large Scale Retail Trade
JOB PURPOSE (short description)	The administrative assistant is able to organize and manage secretary activities in different technical, organizational and technological aspects, evaluating and managing priorities and needs expressed. He/she can take care of the legal obligations involving the company, when economic and legal relationships with internal and external actors are activated: supplies, sales, contracts, credit lines with banks, budget management etc. The administration assistant works for the management of relationships with internal and external stakeholders; he/she holds specific knowledge and skills in the field where the company operates.
REPORTS TO ("upstream" connections)	Department manager/store manager/administrative responsible
MANAGES ("downstream" connections/span of control)	Other administration assistants/buyers/sales manager/commercial manager
CONNECTED TO (horizontal connections)	Human resources dpt/store manager/commercial manager
KEY RESPONSIBILITIES AND ACCOUNTABILITIES (main activities)	**Management of information and communication flows**: the clerk manages relationships with internal customers and external contacts through written and telephone contacts. He/she knows and applies the techniques of oral and telephone communication for the management of interpersonal relationships **Systematization of information and written texts:** he/she manages in an appropriate manner the files, archiving, protocol and data storage and information; he/she writes up tables, presentations, statistics and reports. **Treatment of administrative and accounting documents:** He/she takes care of the acquisition, storage and recording of accounting documents: of the updating of data sheets and tables relating to customers, suppliers, etc.. of the filling up of paper and electronic documents of sale and purchase (orders, receipts, invoices); of the

	management of the administrative and accounting schedule. He/she manages basic accounting. **Business organization and management of the service**: the clerk must know the procedures and know how to organize meetings and business events; he must guarantee the defined quality standards of customer service.
KEY SKILLS AND COMPETENCIES (technical/area specific skills and soft skills acquired in formal, non-formal and informal contexts)	**Soft skills:** the clerk must possess: persuasive communication; orientation to the customer and to the result; ability to organize and manage the skills of the staff; problem solving and time management; knowledge of elements of business organization **Technical/specific skills:** The clerk must be able to: ♦ Use the means for receipt and transmission of internal and external communications: telephone, fax, e- mail, etc. ♦ Recognize the elements identifying incoming communications in order to be able to sort them and apply the same elements to the outgoing communications ♦ Identify and apply manual and computerized protocol , classification and storage of office documents ♦ Use computer applications for the preparation of tables , presentations, statistics and reports addressed to internal and external stakeholders ♦ Recognize the identifying elements of an account document in order to be able to archive and record it ♦ Adopt procedures for the preparation and issue of documents of sale and purchase (orders, receipts, invoices) ♦ Manage basic accounting and administrative processes ♦ Adopt management techniques, in accordance with company strategies ♦ Manage relationships with suppliers and customers ♦ Identify and recognize emergencies and availability in the planning of meetings and business events ♦ identify actions for customer loyalty; ♦ translate data / information of customer satisfaction in actions to improve the services provided
EXPERIENCE REQUIRED (years spent in the role)	1 year: time needed for the on the job acquisition of the competences (training and working) 3 years: to develop a significant experience

EDUCATION/TRAINING/QUALIFICATIONS REQUIRED	Graduation; post-graduate specialization course
EQF LEVEL (or other European standards)	3rd level
NATIONAL QUALIFICATION LEVEL	From the ISFOL catalogue of professions: ♦ Secretarial and office work ♦ Administration assistant ♦ Executive secretary
OTHER REQUIREMENTS	
CAREER DEVELOPMENT	Administrative manager

ADMINISTRATIVE ASSISTANT: PATHWAY TO ATTAIN COMPETENCES

Training Unit 1: Safety in the workplace (soft skills)

Description

Aim of the Training Unit is to know and adopt the main standards relating to safety in the workplace

ISFOL Catalogue of Professions: secretarial staff; accounts assistants and similar

EQF Level

3rd level

Reference to national/regional qualifications

Emilia-Romagna Regional system of Qualifications: administrative secretarial operator

Learning Outcomes

At the end of this unit the learner will:

1. Be able to adopt an behavior appropriate to the principles of safety in the workplace
2. know the main safety measures related to the working environment
3. take actions and tools for risk prevention

Competences

	Learning outcomes		
Competence description	*1*	*2*	*3*
a. learn and adopt the main standards of safety in its own workplace	x	x	x
b. to know the main contractual references and disciplinary rules of its own company		x	x

Content

	Competences	
Content description	*a*	*b*
1. application of the main safety principles to its own working environment	x	
2. specific risks and prevention measures, safety plan, fire prevention, first aid		x

basic knowledge		

Indicative duration of assisted training

T.U. ....**4-8 hrs**

Suggested strategy of delivery

Classroom training with simulations

Suggested strategy of assessment

Assessment tests

Learning support materials

Legislation, corporate regulations, videos

Training Unit 2: HACCP (soft skills)

Description

Aim of this T.U. is to know and adopt the main standards of safety in the workplace

EQF Level

3rd level

Reference to national/regional qualifications

Emilia-Romagna Regional system of Qualifications: administrative secretarial operator
ISFOL Catalogue of Professions: secretarial staff; accounts assistants and similar

Learning Outcomes

At the end of this unit the learner will:

1. be able to adopt behaviors appropriate to the hygienic and health risk relating to his own person

2. be able to adopt behaviors appropriate to the hygienic and health risk relating to his own work cycle

Links with other units/elements

This T.U. concerns soft skills, to be acquired preliminary to the technical competences.

Competences

	Learning outcomes	
Competence description	*1*	*2*
a. know and prevent hygienic and sanitary risks in relation to his own person and work environment	x	x
b. identify possible anomalies in the production cycle		x

Content

Content description	Competences	
	a	*b*
1. Use of standards of reference (dlgs. 155/97)	x	x
2. Assessment and managment of possible food risks and hazards	x	x
3. Proper storage of food		x
4. Keep correctly clean premises and work equipment		x

Indicative duration of assisted training

T.U. .... **4 hrs**

Suggested strategy of delivery

Classroom training with simulations

Suggested strategy of assessment

Assessment tests

Learning support materials

Legislation, corporate regulations, videos

Training Unit 3: communication and relational behaviors (soft skills)

Description

Aim of the T.U. is to know and adopt effective principles of communication and management of relationships with colleagues within the working environment

EQF Level

3rd level

Reference to national/regional qualifications

Emilia-Romagna Regional system of Qualifications: administrative secretarial operator
ISFOL Catalogue of Professions: secretarial staff; accounts assistants and similar

Learning Outcomes

At the end of this unit the learner will:

1. Be able to adopt effective communication strategies within the company.
2. Be able to use the basic techniques of communication for the sale and for the

management of the relationship with the customer.
3. Be able to receive and communicate with the customer.
4. Be oriented to the achievement of common goals.

Links with other units/elements

This T.U. concerns soft skills, to be acquired preliminary to the technical competences.

Competences

Competence description	Learning outcomes			
	1	2	3	4
a. Use a persuasive communication and collaborative relationship with internal and external customers	x	x		
b. adopt effective communication strategies to clients.		x	x	
c. manage customers effectively by assisting them and creating a trustful relationship		x	x	
d. fitting well in the working group; to be oriented to the achievement of common goals.	x		x	x

Content

Content description	Competences			
	a	b	c	d
1. the recipients of communication: internal and/or external to the work context	x			
2. the needs of the customer: the firts approach	x	x		
3. communication within the organizations: styles, techniques, devices		x	x	
4. communicate clearly with internal/external customers		x	x	
5. interact properly with own colleagues				x
6. effective approach to communication, care of own image, personality and behavior	x		x	

7. active and pro-active listening towards colleagues, managers and customers				x
8. use of basic communication selling techniques and for the relationship with the customer	x	x		

Indicative duration of assisted training

T.U. ....**8-16 hrs**

Suggested strategy of delivery

Classroom training with simulations, role playing, exercises

Suggested strategy of assessment

Observation sheet

Learning support materials

Handouts, videos

Training Unit 4: company organization (soft skills)

Description

Aim of the T.U. is to know and adopt key principles relating to the logistic, organization, staff, values and strategies that the company adopted.

1. recognize the organization model, values and mission of its own company
2. know the principles of corporate organization and the distinguishing factors, with particular reference to the companies operating in the large scale distribution
3. know the main business functions and the specificities of the selling point

EQF Level

3rd level

Reference to national/regional qualifications

Emilia-Romagna Regional system of Qualifications: administrative secretarial operator
ISFOL Catalogue of Professions: secretarial staff; accounts assistants and similar

Links with other units/elements

This T.U. concerns soft skills, to be acquired preliminary to the technical competences.

Learning Outcomes

At the end of this unit the learner will:

Competences

	Learning outcomes		
Competence description	*1*	*2*	*3*
a. to know the organizational model, the corporate values, and the development	x	x	

policies of one's own company			
b. to understand the key structural elements that contribute to determine the organizational model of a company and the structural and dimensional elements on which it relies	x	x	
c. to understand the pattern of organization, of human resources management, of internal cultural models, of organizational change, of the main economic and commercial elements of the company		x	x
d. to understand the conditions and factors of profitability of the company (productivity, effectiveness, efficiency)		x	x

Content

	Competences			
Content description	*a*	*b*	*c*	*d*
1. Introduction to the general concepts of corporate organization	x	x	x	
2. The company and its organization: the head quarters and the local branches		x	x	x
3. The company structure: roles and functions.	x	x	x	
4. Presentation and history of the local branch	x	x	x	
5. Type of organizational model adopted in the company		x	x	x
6. Organization of the store point		x	x	x
7. Sharing of the corporate values: mission and corporate objectives		x	x	
8. The company regulations and the organization of the activities		x	x	x

Indicative duration of assisted training

T.U. .... **8-16 hrs**

Suggested strategy of delivery

Classroom training with simulations, role playing, exercises

Suggested strategy of assessment

Observation sheet

Handouts, videos

Training Unit 5: Problem solving (soft skills)

Description

Aim of the T.U. is to adopt tools that allow a working effectiveness in terms of time management and resolution of problems and urgencies

EQF Level

3rd level

Reference to national/regional qualifications

Emilia-Romagna Regional system of Qualifications: administrative secretarial operator
ISFOL Catalogue of Professions: secretarial staff; accounts assistants and similar

Learning Outcomes

At the end of this unit the learner will:

1. Know the tools of project management aimed to time management
2. Adopt effective strategies for the resolution of problems
3. Design a correct management of activities according to priorities

Links with other units/elements

This T.U. concerns soft skills, to be acquired preliminary to the technical competences.

Competences

	Learning outcomes		
Competence description	*1*	*2*	*3*
a. To diagnose and solve problems	x	x	
b. To manage work priorities	x	x	
c. To know how to handle emergencies		x	x
d. To know how to read the consequences of one's own actions, and how to identify effective strategies with respect to means, resources and timing		x	x

Content

	Competences			
Content description	*a*	*b*	*c*	*d*

1. How to set up and maintain a good organization of time	x	x	x	
2. Analysis of problems and difficulties in the management of time		x	x	x
3. Use of basic tools of problem solving	x	x	x	
4. Management of complaints Gestione di reclami e lamentele	x		x	x
5. Prevention of critical situations	x		x	x

Indicative duration of assisted training

T.U. .... **8-16 hrs**

Suggested strategy of delivery

Classroom training with simulations, role playing, exercises

Suggested strategy of assessment

Observation sheet

Learning support materials

Handouts, videos

Training Unit 6: handling of telephone communication with internal and external customers

Description

Aim of the T.U. is to know and be able to handle a telephone communication, expressing properly depending on the context and the interlocutor, using appropriate communication languages

EQF Level

3rd level

Reference to national/regional qualifications

Emilia-Romagna Regional system of Qualifications: administrative secretarial operator

ISFOL Catalogue of Professions: secretarial staff; accounts assistants and similar

Learning Outcomes

At the end of this unit the learner will:

1. Develop and use techniques of communication and relationship with the customer
2. Use informatic and informative tools of communication
3. Make appropriate use of the processes of reception and first communication with the customer

Competences

	Learning outcomes		
Competence description	*1*	*2*	*3*

a. To use the office tools of reception and transmission of internal and external communication: fax, telephone, email etc		x	
b. To identify and apply manual and computerized ways of protocol, classification and storage of office documents		x	
c. To identify ways to remove obstacles to internal and external communication in the company	x		x
d. To use the tools for reception and trasmission of office internal and external communication: telephone, fax, email etc		x	

Content

	Competences			
Content description	*a*	*b*	*c*	*d*
1. Handling of communication with customers: approaches, methods, management of objections			x	
2. Techniques for decoding the messages			x	
3. Characteristics of telephone communication: advantages and limits of the tool			x	
4. Effective communication and proper behavior in the proces of reception of customers			x	
5. Organization of secretarial work	x	x		x
6. Notes on active and passive cycle	x	x	x	x

Indicative duration of assisted training

T.U. ....**12-32 hrs**

Suggested strategy of delivery

Classroom training; on the job/shadowing training

Suggested strategy of assessment

Assessment through observation sheets and/or practical situational test

Learning support materials

Videos, company material, handouts

Training Unit 7: management of correspondence and archives

Description

Aim of the T.U. is to know and set up the management of the work cycle, particularly focusing on administrative management, storage and decoding of documents

EQF Level

3rd level

Reference to national/regional qualifications

Emilia-Romagna Regional system of Qualifications: administrative secretarial operator

ISFOL Catalogue of Professions: secretarial staff; accounts assistants and similar

Learning Outcomes

At the end of this unit the learner will:

1. Be able to prepare documents
2. Properly use tools of work
3. Be able to manage administrative outcoming and incoming documents

Competences

	Learning outcomes		
Competence description	*1*	*2*	*3*
a. To apply the main techniques to draft letters, press releases, notes of common use	x	x	x
b. To use the softwares for the preparation of tables, presentations, statistics, reports addressed to internal and external interlocutors		x	x
c. To assess the correctness of a written text (grammar and sintax) and its respondence to the communication objectives defined	x	x	x

Content

	Competences		
Content description	*a*	*b*	*c*
1. Role of secretary officer	x	x	x
2. General activities of secretariat: storage company brochures, prices variations, intranet management; check of advertisement on local dailies; communication with headquarters; management of deadlines; works with	x	x	x

public offices; management of estimates; maintenance taxation of cash registers			
3. Management of procedures for the collection of special forms of payments: checks; financing; advances; mixed payments, on credit, foreign currency;			x
4. The handling of inward and outward correspondence: priority of information; aims, operating procedures, and use of the protocol, also computerized	x		
5. Definition of a proper and practical classification system, through the creation of codes/abbreviations	x	x	
6. Management and control of telephone calls: how to distinguish the identification elements of inward communication for sorting and applying them to outgoing ones	x		

Indicative duration of assisted training

  T.U. .... **8-32 hrs**

Suggested strategy of delivery

Classroom training; training on the job

Suggested strategy of assessment

Assessment through observance sheets and/or practical situational test

Learning support materials

Videos, corporate materials, handouts

Training Unit 8: accounting documents: management and storage

Description

Aim of the T.U. is to know and set up the administration and account management of the store, through the operations of administration of economic account of the department/area/store.

EQF Level

3rd level

Reference to national/regional qualifications

Emilia-Romagna Regional system of Qualifications: administrative secretarial operator
ISFOL Catalogue of Professions: secretarial staff; accounts assistants and similar

Learning Outcomes

At the end of this unit the learner will:

1. Know how to organize a department/sector/store according to

criteria of functionality, service, cost
2. Development of the procurement plan
3. Definition of the product layout
4. Setting up of exhibition spaces

Links with other units/elements

T.U. 8 e T.U. 9 are strictly connected: the expected competences and outcomes are in fact the same.

Competences

	Learning outcomes			
Competence description	1	2	3	4
a. To distinguish the characterizing elements of an accounting document for the storage and registration procedures	x	x	x	x
b. To adopt procedures for the preparation and issuing of documents of sale and purchase (orders, receipts, invoices)		x	x	x
c. To assess the correctness of economical transactions in the relationship with services and stakeholders external to the company	x			x

Content

	Competences		
Content description	a	b	c
1. Accounting receivable	x		x
2. Accounts payable: costs and services invoices; SAP management procedure ; other procedures		x	x
3. Closing of accounts: operations of monthly closing; closing of year end		x	x
4. Accounts receivable		x	x
5. Management of contributions; revaluations and advertising agreements	x	x	x

Indicative duration of assisted training

T.U. ....**12-32 hrs**

Suggested strategy of delivery

Classroom training; training on the job

Suggested strategy of assessment

Assessment through observation sheets

Training Unit 9: accounting administration of customers and suppliers

Description

Aim of the T.U. is to know and set up the administration and account management of the store, through the operations of administration of economic account of the department/area/store.

EQF Level

3rd level

Reference to national/regional qualifications

Emilia-Romagna Regional system of Qualifications: administrative secretarial operator
ISFOL Catalogue of Professions: secretarial staff; accounts assistants and similar

Learning Outcomes

At the end of this unit the learner will:

1. Know how to correctly manage the administrative and accounting procedures
2. Know and manage the procedures relating to purchase and selling
3. Have basic notions of price definition

Links with other units/elements

T.U. 8 e T.U. 9 are strictly connected: the expected competences and outcomes are in fact the same.

Competences

	Learning outcomes		
Competence description	*1*	*2*	*3*
a. To distinguish the characterizing elements of an accounting document for the storage and registration procedures	x	x	x
b. To adopt procedures for the preparation and issuing of documents of sale and purchase (orders, receipts, invoices)		x	x
c. To assess the correctness of economical transactions in the relationship with services and stakeholders external to the company	x		

Content

Content description	Competences		
	a	b	c
1. Supply chain: Catena della supply chain: negotiation; order; inventory management; supplì management	x		
2. Analysis of the local competitive context in commercial terms	x		x
3. Commercial management			x
4. Updating on the new secretary processes	x	x	
5. Elements of "income statement" and of construction of an "economic budget"		x	x
6. Inventory difference	x		
7. Selling price: how to define it and of what elements is made			x

Indicative duration of assisted training

T.U. ....12-32 hrs

Suggested strategy of delivery

Classroom training; training on the job

Suggested strategy of assessment

Assessment through observation sheets

Learning support materials

Videos, corporate materials, handouts

Training Unit 10: Informatics

Description

Aim of the T.U. is to be able to make full use of computer tools for one's daily work

EQF Level

3rd level

Reference to national/regional qualifications

Emilia-Romagna Regional system of Qualifications: administrative secretarial operator

ISFOL Catalogue of Professions: secretarial staff; accounts assistants and similar

Learning Outcomes

At the end of this unit the learner will:

1. Correctly use the computer tools
2. Know the specific company softwares
3. Be able to prepare documents, reports, analysis of data etc

Competences

	Learning outcomes		
Competence description	1	2	3
a. To use the main softwares for reporting	x		x
b. To know and correctly use office software	x	x	x
c. To be able to use email, internet, web 2.0 for work	x		

Content

	Competences			
Content description	a	b	c	d
1. Softwares for the administration management		x		x
2. Office softwares	x	x	x	x

Indicative duration of assisted training

T.U. ....12-32 hrs

Suggested strategy of delivery

Classroom training; training on the job

Suggested strategy of assessment

Assessment through observance sheets

Learning support materials

Videos, corporate materials, handouts

Training Unit 11: management and organization of human resources

Description

Aim of the T.U. is to be able to develop a correct management strategy of the human resources of the store, considerino the organization and characteristics of the working group

EQF Level

5th level

Reference to national/regional qualifications

Emilia-Romagna Regional system of Qualifications: store technical manager
ISFOL Catalogue of Professions: commerce and distribution: department manager; operator of franchising store; operator

Learning Outcomes

At the end of this unit the learner will:

1. Know how to organize Staff coherently with the need to cover the department/sector/store
2. correctly organize work
3. Prepare a programme of basic, specialistic training and updating for the staff
4. Coordinate the staff of the department/store
5. Evaluate personnel

Competences

	Learning outcomes				
Competence description	1	2	3	4	5
a. To determine staff and shifts of personnel of the department/store fora n effective covering of the selling flows and services delivery	x	x			
b. To assess characteristics, quality and competences of the staff of the department/secotr/store		x	x	x	x
c. To identify the motivational leverages of a relational cognitive and behavioural kind, in order to enhance the value of the staff of the department/sector/store			x	x	
d. To transfer professional contents to the staff of the department/store, through actions of shadowing, training etc.	x		x		

Content

Content description	Competences			
	a	*b*	*c*	*d*
1. Effective management of the staff of the store: work organization; shifts; holidays; peaks workloads; in relation to the programming of the selling activity	x	x		
2. Coordination of shifts of the staff of the store/department	x	x		
3. Techniques of identification of competences and professionality of staff		x	x	x
4. Management of a work group		x	x	x
5. Motivational leverages for enhancing the value of the staff		x	x	x
6. Training on the job			x	x
7. Planning of basic training, specialistic training, updating programmes			x	x
8. Basic tools to evaluate the abilities and potentialities of own staff			x	x

Indicative duration of assisted training

T.U. .... 8-32 hrs

Suggested strategy of delivery

Classroom training; training on the job

Suggested strategy of assessment

Assessment through observance sheets

Learning support materials

Videos, corporate materials, handouts

Training Unit 12: service and customer satisfaction

Description

Aim of the T.U. is to define the qualitative and quantitative tools for the customer loyalty and provide a proper assessment of the satisfaction of the service delivered.

EQF Level

3rd level

Reference to national/regional qualifications

Emilia-Romagna Regional system of Qualifications: store technical manager
ISFOL Catalogue of Professions: commerce and distribution: department manager; operator of franchising store; operator

Learning Outcomes

Competences

At the end of this unit the learner will:

1. Realize interventions aimed to the loyalty of the customer
2. Check the satisfaction degree of the customer
3. Elaborate data and information about consumer's behavior

	Learning outcomes		
Competence description	*1*	*2*	*3*
a. To assess offered products and guaranteed quality standards	x	x	x
b. To know the concept of quality system, of customer satisfaction and of internal/external customer	x	x	x
c. To manage critics and complaints of customers		x	

Content

	Competences		
Content description	*a*	*b*	*c*
1. The qualitative assistence to the customer		x	x
2. Elements of service		x	x
3. Differences between service delivered, perceived and expected		x	x
4. Customer Satisfaction: from the orientation to the product to the orientation to customer		x	x
5. Management of complaints		x	x
6. Behaviors and attitudes favouring or unfavouring the loyalty of the customer/user		x	x
7. Elements of correct behavior in the management of critical situations with the customer			x
8. Study of processes and methods of sale	x	x	
9. Study of the techniques of advanced selling of	x	x	

services/products			
10. Management of complaints and legal guarantee of the consumer	x	x	x

Indicative duration of assisted training

T.U. ....12-32 hrs

Suggested strategy of delivery

Classroom training; training on the job

Suggested strategy of assessment

Assessment through observance sheets

Learning support materials

Videos, corporate materials, handouts