Education and Culture
Lifelong learning programme
LEONARDO DA VINCI

Training guide for

the « management assistant for SME»

common certification

Table of contents

Introduction

This leaflet is dedicated to the representatives of vocational education and training systems or heads of training centres which not yet involved in the process pursued by nine partner countries of the Eurasment project. It should enable them to foresee the best way of joining the network of initial partners.

The aim is the implementation, fully or partly, of the *management assistant for SME* certification elaborated in common, in each interested system. The results presented in this document have been built up in the framework of a close dialogue with representatives from the professional organisations concerned and competent bodies from each country. Working documents are available on the website dedicated to Eurasment, but for a better legibility, has not been enclosed in the leaflet.

The process leading to these results consisted in:

- Defining a reference trade, « management assistant for SME », and describing the profile in terms of activities and tasks;
- Defining knowledge, skills, competences and attitudes to master in order to obtain the certification;
- Grouping together these learning outcomes into relevant units to enable a progressive achievement of the certification, taking into account the mobility experience;
- Fixing flexible procedures enabling the adaptation, fully or partly, of these reference units in each system, taking into consideration its specificities;
- Consulting each other to define training programmes, to enable mobility during the training period;
- Suggesting a method for the allocation of credit points to units, knowing that most of initial partners do not have credit points currently in their system ;
- Suggesting a methodology to update the qualification, in order to ensure the sustainability of cooperation between systems.

More than thirty initial vocational training centres, in close link with local enterprises and national professional organisations, have undertaken to build a network allowing mobility of their students in the framework of work placements or during their training period.

Countries and organisations involved in the implementation of the common certification

FRANCE

- Ministère de l'Education nationale
- Ministère de l'Enseignement supérieur et de la recherche
- AGEFA PME
- Centre International d'Etudes Pédagogiques (CIEP)

GERMANY

- Hauptverband des Deutschen Einzelhandels (HDE)

ESTONIA

- Lääne-Virumaa Kutsegorkool (LVK)

GREECE

- Organization for Vocational Education and Training (O.E.E.K.)

ITALY

- Ministero Istruzione Università e Ricerca – Ufficio Scolastico Regionale (USR)

POLAND

- Zaklad Doskonalenia Zawodowego (ZDZ)

PORTUGAL

- Contro de Formacao Profissional para o Comercio e Afins, (CECOA) – Centre de formation professionnelle pour le commerce et les services

ROMANIA

- Ion Ghica Economic Highschool in Targoviste

UNITED KINGDOM

- Council for Administration (CfA)

SILENT PARTNERS

SPAIN

- Ministerio de Educación y Ciencia - Subdirección General de Formación Profesional

SWITZERLAND

- Société des Employés de Commerce de Lausanne (SEC)

,

DESCRIPTION OF THE PROFILE

JOB DEFINITION

The Management Assistant carries out his/her assignment in close collaboration alongside the manager or manager/owner of a small or medium sized company or senior executive. He/she is directly responsible to him/her.

This assignment is characterised by strong versatility, predominantly administrative. It can be broken down into various activities which are explicitly assigned by the manager or manager/owner.

PROFESSIONAL CONTEXT

The work of a Management Assistant is performed in organisations with structures where administrative management requires great versatility. Therefore it mainly concerns companies with 5 – 50 employees covering all areas of activity, where the Manager is the owner of his/her company and enjoys complete legal and financial independence. In certain areas such as distribution for example, the company can be larger.

Other organisations such as companies with more than 50 employees, structured as responsibility or profit centres (agencies, small subsidiaries, branch offices …) or public bodies, associations, societies can seek this type of profile on account of its versatility and adaptability

MISSIONS AND LEVEL OF RESPONSIBILITY

The versatility of the Management Assistant enables him/her, within the confines of his/her responsibilities fixed by the manager/owner manager, respecting rules of confidentiality and the particular cultural context of the SME to:

- participate in the operational management of the company in its administrative, accounting, commercial and human aspects

- contribute to the improvement of its efficiency by optimizing its organisation

- contribute to its sustainability by anticipating needs, accompanying its development and participating in monitoring its activity by putting in place indicators which he/she submits to the manager or manager/owner

The Management Assistant carries out two types of activities :

- activities of support to the manager/owner

- activities of support to the running of the organisation

THE PROFESSIONNAL ACTIVITIES COMMITTED TO A MANAGEMENT ASSISTANT FOR SME

Activity 1: Management of client relations

1. Sourcing and contacting of clients
2. Sales administration
3. Maintaining and development of client relations

Activity 2: Management of supplier relations

1. Sourcing and selecting of suppliers
2. Purchasing of goods and services
3. Tracking of purchases

Activity 3: Human resources management and development

1. Personnel administration
2. Participation in human resources management

Activity 4: Organisation and planning of activities

1. Organisation and improvement of administrative work
2. Organisation of activities
3. Participation in the organisation of collaborative work

Activity 5: Resource management

1. Participation in fixed asset management
2. Participation in financial resources management
3. Information management

Activity 6 : Company sustainability

1. Participation in the promotion of good practice
2. Participation in knowledge management
3. Participation in management control
4. Participation in commercial development
5. Participation in the diagnosis and the drafting of a take-over plan

Activity 7 : Risk management

1. Participation in IT risk prevention
2. Participation in the promotion of health and safety at work
3. Participation in handling of staff insurance policies and protection of property rights
4. Participation in financial risk management
5. Participation in environmental risk management

Activity 8 : Company communication

1. Internal communication (contribution to efficiency, cohesion and motivation)
2. External communication (Contribution to enhancement of the corporate image

SHARED REFERENCES FOR CERTIFICATION

For each activity and task have been listed knowledge, skills and competences necessary to their good implementation. The table here below introduces the selected model applied to activity A – Management of client relations. The totality of the shared references can be downloaded on Eurasment website.

Tasks	Skills	Wider competences	Knowledge	Learning outcomes
T11.1. Organising of client sourcing and making contacts	C111.1. Define and set up a prospecting method C111.2. Draft the documents necessary for monitoring the prospecting C111.3. Pinpoint and check suitability and status of potential clients C111.4. Carry out or have carried out the commercial documents necessary for the client prospecting C111.5. Keep the data on potential clients up to date C111.6. Present the company's written bid	AP111.1. Appreciate the confidential character of client information collected and handled AP111.2. Respect the confidentiality of client information AP111.3. Demonstrate accuracy and reliability when handling client information	**S11.1. Client identification** - Marketing approach - Typology of clientele - Segmentation - Explanatory variables of purchasing behaviour - Purchase decision: those involved and process **S11.2. Prospecting and checking of suitability and status of potential clients** - Main sources of information on clients - Types of information on the clientele : identification, qualification, relationship, behaviour - Prospecting : potential client, plan, methods, assessment tools	An analysis of the commercial situation, the identification of the target and the choice of a prospecting method A procedure for the chosen prospecting method Documents necessary for the prospecting A suggestion for adapting the relational schema of the commercial database The formulation of database information requests The updating of the company's database Documents for presenting the bid
T11.2. Recognition, analysis and tracking of tenders	C112.1. Pinpoint and select invitations to tender C112.2. Coordinate the internal actors concerned C112.3. Gather the information from external actors C112.4. Constitute the bid file, respecting the procedure C112.5. Design tables to track tenders	AP112.1. Bring the right people in on the execution of tasks AP112.2. Facilitate communication and collaboration between the internal actors concerned by the bid AP112.3. Be careful about the accuracy and reliability of information on the invitations to tender AP112.4. Ensure deadlines are met concerning invitations to tender	**S11.3.The presentation of the bid** - Bid : subject, characteristics, structure and formatting - Commercial information documents : letters, leaflets, booklets, catalogue **S11.4. The recognition and analysis of tenders** - Tenders - Impact of new technologies on tenders	An analysis of the invitations to tender and a list of selected bids Tools for the coordination of internal actors and follow up to prepare the bid and the use of the tools Letters requesting references from external actors The checking on the conformity of the contents of the bid file

Resources required to carry out activity A.1.1 :

Information on the products, prices and general sales conditions, potential and actual clients, the companies likely to bid for a tender (products, constraints, resources …) and on the organizations which call for tenders
Invitations to tender. Access to Internet and intranet. Internal and external commercial literature.
An extract from the relational schema of the commercial field
Suitable software *(spreadsheet, word processor, RDMBS, ERP or sales management software packages, project management, internet browser, message handler)*

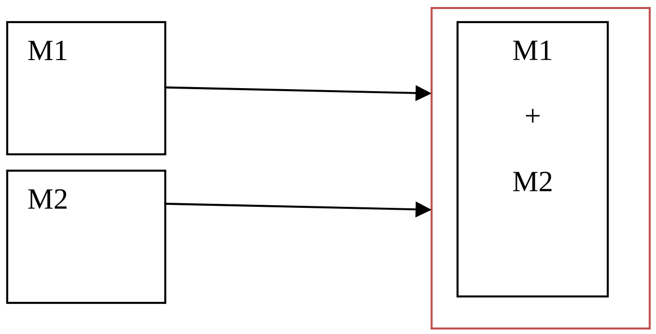
CUTTING OF THE SHARED REFERENCES INTO TRAINING UNITS

The common description of the "management assistant for SME" certification, in terms of learning outcomes units, must allow a flexible adaptation into each national system. Therefore, the totality of the shared references is cut into training modules. Thus, in each specific system:

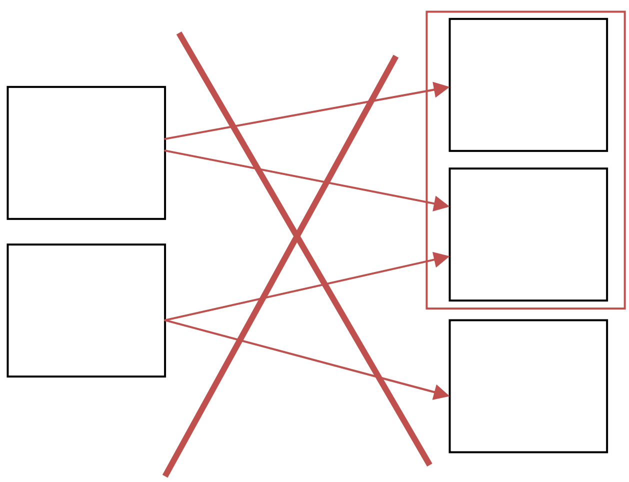
- a unit can make up a certification in itself : all units and them only are thus retained;
- a unit can make up a part of a wider certification: other training units can thus be added to make up a certification unit;
- the unit can be divided into several certifications: only a part of the units is thus retained and makes up an autonomous certification in itself.

Units as they have been defined are coherent groupings of learning outcomes, but it is always possible to find other coherences. In that case, units can be grouped together to form larger units, or units can be subdivided to form a set of smaller units. Therefore, it is important to respect a few simple rules to maintain compatibility with other systems and retain mobility possibilities.

From reference units to wider national units

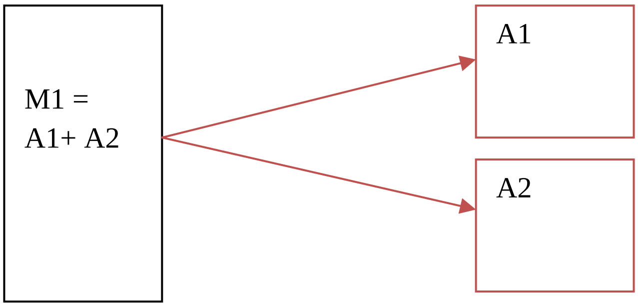


2 (or more) reference units make one oneoneoneonenationale

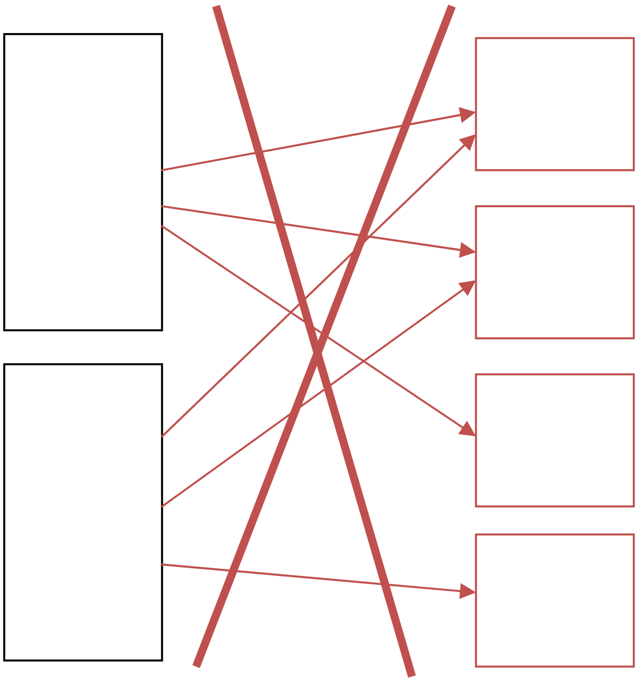


It is not possible to share out learning outcomes from one reference unit by reconstructing disparate units

From reference units to smaller units



Learning outcomes from one reference unit can be spread out into several national providing that the integrity of the reference unit is maintained.



Learning outcomes from one reference unit can not be spread out into several national units if this leads to building disparate units.

Combined solutions can be envisaged providing that the integrity of reference units is preserved.

CUTTING INTO MODULES

		Number of hours per module				
		France	Italy	Portugal	Estonia	Romania
Module 1	Management of client and supplier relations	150	125	150		150
Module 2	Human resources management and development	60	60	100		60
Module 3	Management of administrative activities	70	80	75		60
Module 4	Management of collaborative work	20	25	25		30
Module 5	Management of financial resources	60 (or 50)	70	50	*130 auditorial hours*	60
Module 6	Financial analysis	50	50	75	*130 auditorial hours*	60
Module 7	Management of IT resources	70	80	50		60
Module 8	Company sustainability	70	60	100		60
Module 9	Management of environmental risks and risks concerning people	60 (or 50)	40	50		60
Module 10	Written communication	60 (or 70)	40	50		60
Module 11	Oral communication	50	40	50		30
Module 12	Commercial and corporate communication	60 (or 50)	40	50		30

COMMON CONSIDERATIONS ABOUT THE ALLOCATION OF CREDIT POINTS TO UNITS

The purpose of credit points is to provide additional information about learning outcomes units and their relative value compared to the whole certification. Allocation modalities of credit points, even in the planned text of Recommendation from the European Commission, are not stabilized. Consequently, it was difficult to make consolidated proposals, even more given that most partner countries of the project had not credit points in their own system at the moment.

Nevertheless, a certain number of principles have been defined in common:

- Credit points have been allocated to common reference units, knowing that these units can be adapted in each national context and thus can not be found under exactly the same form in each national certification;
- To maintain the coherence of the common work, the transcription of points allocated at a national level must not lead to a variation higher than 10% in comparison with the common definition. This constitutes a certain form of "currency snake" for the value of a unit.
- This relative value of the module is expressed under the form of a percentage, in comparison with the totality of modules defined in common, because this whole can be meant for integrating itself in a wider whole or be subdivided in each system.

This convention will be effective only when each system will have defined its own rules.

THE MAINTAINANCE OF THE "EURASMENT" PROFILE

A methodology for updating the EURASMENT profile at European level.

INTRODUCTION AND APPROACH

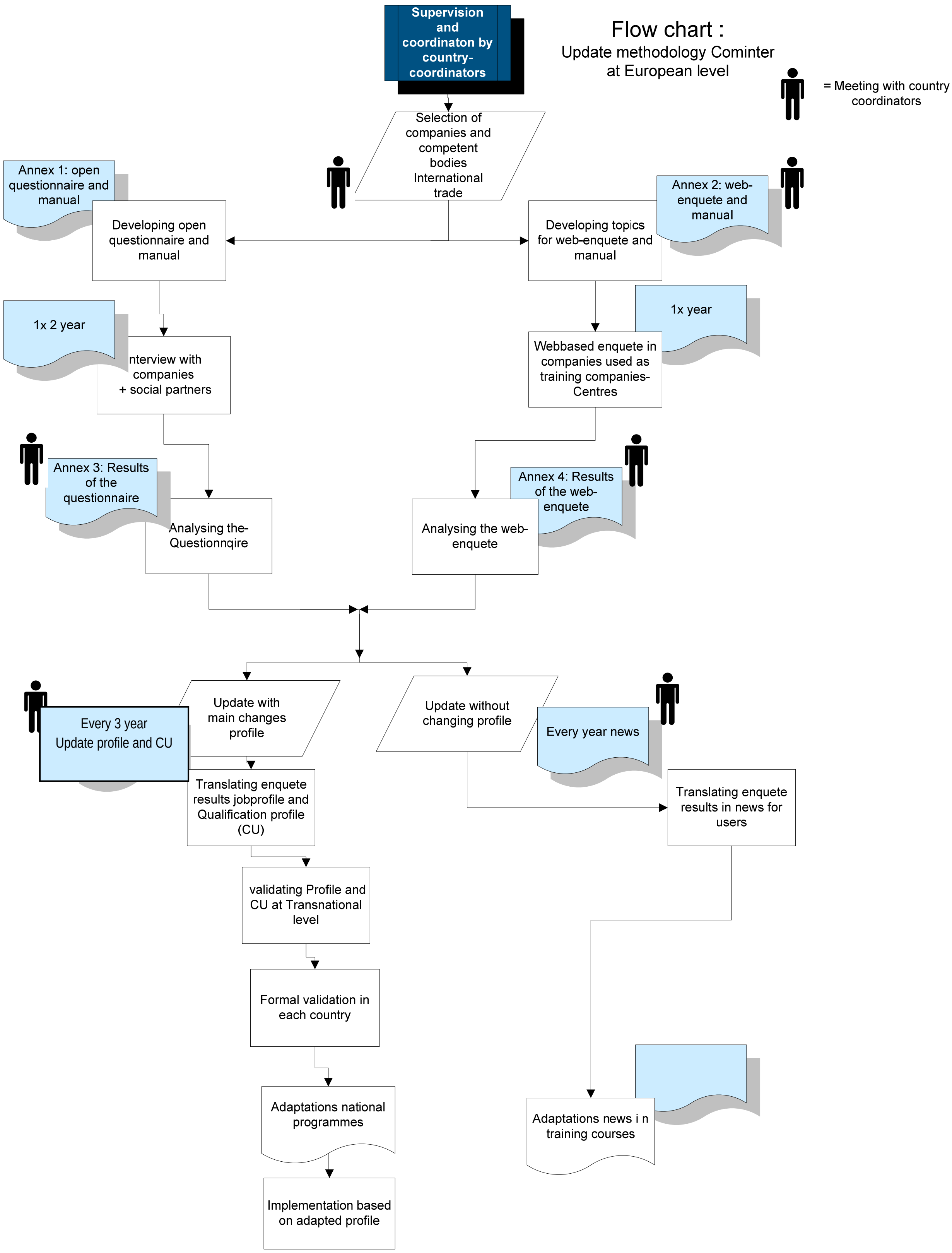
For the update methodology of the EURASMENT profile, the following issues have to be taken into account:

- All the relevant parties have to be involved (i.e social partners, training companies, training centres, national bodies etc.);
- A procedure should be implemented allowing the feedback of the results obtained at a national level in the framework of the transnational partnership of Eurasment;
- A pole of coordination is in charge of the implementation of the procedure;

In the update methodology for the EURASMENT profile an approach is used in order to cover all the three items above.

The general approach is the following:

- In order to make sure that the update procedure will be carried out and the results will be collected at European level, the current national project leaders of the EURASMENT project will be determined as the country coordinators. These coordinators have the responsibility to set up the procedures for updating at national level, collect the results at national level and bring them in the EURASMENT project team at European level.
- A two way approach is used in order to involve the companies and social partners on one hand and users like training centres, trainers etc. on the other hand. Every three year with the users an online questionnaire will be carried out and filled in by the training centres en analysed. The social partners and training companies will be involved in a more thorough interview according to the same periodicity. This two-way approach allows us to get practical feedback at user level in a very efficient and effective way.
- With the results of the questionnaires and interviews which will have a major and/ or sustainable impact on the EURASMENT profile, the EURASMENT profile will be updated once in 5 years. The reason for not updating the profile officially more often is that a formal update of the EURASMENT profile will have impact on the certification units, curricula and training and certification methodologies.


Supervision and coordinaton by country-coordinators
Flow chart :
Update methodology Cominter at European level
= Meeting with country coordinators
Selection of companies and competent bodies International trade
Annex 1: open questionnaire and manual
Developing open questionnaire and manual
Annex 2: web-enquete and manual
Developing topics for web-enquete and manual
1x 2 year
nterview with companies + social partners
1x year
Webbased enquete in companies used as training companies-Centres
Annex 3: Results of the questionnaire
Analysing the-Questionnqire
Annex 4: Results of the web-enquete
Analysing the web-enquete
Update with main changes profile
Update without changing profile
Every 3 year
Update profile and CU
Every year news
Translating enquete results jobprofile and Qualification profile (CU)
Translating enquete results in news for users
validating Profile and CU at Transnational level
Formal validation in each country
Adaptations national programmes
Adaptations news i n training courses
Implementation based on adapted profile

The update: a 10 step methodology

1. The country coordinators will participate in a transnational meeting in order to set up the procedure for updating the EURASMENT profile. For the updating procedure, companies, training centres and social partners have to be selected. During the meeting the country coordinators take care of the development of the online questionnaire and the topics for the interviews;

2. A two-way approach is used every three years:
   a. via an online questionnaire with the users (training centres);
   b. via an interview with the companies and social partners;

3. Results of the questionnaire and/ or the interviews have to be analysed, translated and discussed during a second transnational meeting;

4. During the transnational meeting the country coordinators decide whether the trends and developments of the analysis will lead to a significant change of the EURASMENT competence profile or not;

5. The information of the analysis which will NOT lead to significant changes in the EURASMENT profile, will be selected and compiled as practical news and information for the users, applicable in training courses;

6. The trends and developments which will lead to significant changes have to be collected. Once in five years the trends and developments have to be translated and transferred to the EURASMENT profile;

7. Validation and adaptation of the revised EURASMENT profile by the EURASMENT project team at European level;

8. Formal validation of the revised EURASMENT profile at national level;

9. Adaptation of national programmes and methods;

10. Implementation of the revised EURASMENT programme in the training centres and training companies.

CONTACTS

FRANCE

Ministry of Education – Ministère de l'Education nationale
Claude NAVA
Claude.nava@education.gouv.fr

AGEFA PME
Jean-Jacques DIJOUX
jjdijoux@agefa.org

GERMANY

Hauptverband des Deutschen Einzelhandels (HDE)
Wilfried MALCHER
malcher@hde.de

ESTONIA

Lääne-Virumaa Kutsegorkool (LVK)
Hille AINSAR
hille@modriku.edu.ee

GREECE

Organization for Vocational Education and Training (O.E.E.K.)
Teodora THYMIOPOULOU-Athanasia AKRIVOU
tm.eth@oeek.gr

ITALY

Ministero Istruzione Università e Ricerca – Ufficio Scolastico Regionale (USR)
Simonetta BETTIOL
simonetta.bettiol@istruzione.it

POLAND

Zaklad Doskonalenia Zawodowego (ZDZ)
Michal STANISZEWSKI
mstaniszewski@zdz.kielce.pl

PORTUGAL

Contro de Formacao Profissional para o Comercio e Afins, (CECOA) – Centre de formation professionnelle pour le commerce et les services
Cristina DIMAS
cristina.dimas@cecoa.pt

ROMANIA

Ion Ghica Economic Highschool in Targoviste
Suzana ILIE
icsuzana@yahoo.com

UNITED KINGDOM

Council for Administration (CfA)
Uta SEMPF
uta.sempf@cfa.uk.com

SPAIN

Ministerio de Educación y Ciencia - Subdirección General de Formación Profesional
Rosa MOLINA
rosam.molina@mec.es

SWITZERLAND

Société des Employés de Commerce de Lausanne (SEC)
Norbert GENOUD
norbert.genoud@bluewin.ch

Education and Culture
Lifelong learning programme
LEONARDO DA VINCI

This project has been funded with support from the European Commission.
This publication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.