



THEME Competence Matrix - Trade



COMPETENCE AREAS	STEPS OF COMPETENCE DEVELOPMENT			
<p>1. Organising and conducting the process of selling products and services</p>	<p>He/She is able to deal with customer needs by enquiries, prepare corresponding quotations (either in writing or orally) and deal with well-defined customer orders regarding established product portfolios (including explaining products, services, payment and delivery process).</p> <p>He/She is able to organise the shipping process (e.g. clarify availability of products and shipping services, fill out standard forms like packing list, accompanying documents and certificates of origin) according to existing standards.</p>	<p>He/She is able to analyse and/or deal with the specifications of customer needs (by enquiries), initiate customer orders through making offers based on his needs and handle/deal with customer orders.</p> <p>He/She is able to prepare and/or provide information (write reports, prepare presentations) about customer needs, product/service specifications, market situation, delivery and shipping conditions for the customer, sales partner or management and provide relevant contracts and agreements.</p> <p>He/She is able to organise and/or provide information flow (e.g. by advertising, factory tours, ...) required by customers, management and/or sales partners in order to present the company's production facilities.</p>	<p>He/She is able to advise customers, clarify ordering problems and socialise with persons in relevant institutions (e.g. distributor services, trade information centres, chambers of commerce) to find possibilities for selling.</p> <p>He/She is able to arrange the process of negotiation taking into account all aspects (price, contract, delivery, insurance, legal regulations, preferential tariff rate, payment, customer satisfaction and offers of other companies).</p>	<p>He/She is able to find solutions for selling, payment and delivery problems, financing and contractual difficulties.</p> <p>He/She is able to prepare statistics and design strategies to achieve customer satisfaction (reporting customers' reactions; handle claims arising taking into consideration a cost-effective solution).</p> <p>He/She is able to organise and implement product training for sales partners / customers and is able to arrange / undertake business trips (e. g. trade fairs).</p>



THEME Competence Matrix - Trade



<p>2. Ensuring the process of purchasing</p>	<p>He/She is able to order well defined lots and products (known products, supplier and delivery services) with the help of enterprise resource planning (ERP like SAP/Navision) systems.</p> <p>He/She is able to handle ordering documents and ensure information flow to different departments and companies.</p>	<p>He/She is able to compare offers in terms of prices, quality and delivery conditions.</p> <p>He/She is able to observe purchasing processes and provide the seller with information and necessary documents (e.g. waybills, CMR, airway bill, B/L, invoice, certificate of origin, export declaration, letter of instructions for the seller, packing list) and react accordingly in case of sales disturbances (correcting faulty documentation).</p> <p>He/She is able to analyse the distribution market and carry through regional market analysis for ensuring suitable purchasing processes (benchmarking, brands, product areas, different cargo enterprises).</p>	<p>He/She is able to analyse the purchasing process in cooperation with other departments of the company (e.g. quality department), to decide about suitable suppliers, appropriate products in terms of material / services for production and the best transport company and transport process taking into account delivery conditions (time, price, transport conditions needed for different goods ...).</p> <p>He/She is able to negotiate prices and delivery conditions.</p> <p>He/She is able to solve sales disturbances with respect to obtaining missing information, completing the payment process and making suitable arrangements in the event of delivery failures (such as finding replacement for a transport company).</p>
<p>3. Organising the package, the storage of goods as well as transport processes (logistics)</p>	<p>He/She is able to organise the transport process by identifying stock location, assigning packing and delivery of goods to cargo companies taking into account weights, measures, transport conditions, customer wishes and needs for adaptation for the foreign market (e.g. (foreign language) labelling).</p> <p>He/She is able to coordinate different companies and departments for selling, purchasing, transport and installation abroad.</p>	<p>He/She is able to manage stock and logistic processes by using ERP software to ensure enough goods are in stock, cargo companies are available and shipping services are provided.</p> <p>He/She is able to organise the distribution process by commissioning production orders and organising the production process.</p>	<p>He/She is able to analyse types of packaging and choose most suitable packages and ways of transport for products (considering delivery destinations, delivery time, routes of transport).</p> <p>He/She is able to issue export documents (e.g. export declaration, EUR.1, ...) taking shipping regulations and handling rules into account and ensuring compliance with environmental and safety standards.</p> <p>He/She is able to organise appropriate product and package labelling (country, weight, number, size, handling etc.).</p>



THEME Competence Matrix - Trade



<p>4. Coordinating and conducting the flow of documents and financial transactions</p>	<p>He/She is able to document and archive all correspondence concerning market research, selling, purchasing, financial transactions, logistic processes and cooperation affairs.</p> <p>For this purpose he/she is able to use suitable communication and conferencing systems as well as database driven archiving and distribution systems.</p>	<p>He/She is able to ensure bookkeeping of all processes (finance, assets, personnel, storage and logistics) taking into account the challenges of foreign markets.</p> <p>He/She is able to provide statistics for reports and relate transactions to cost units and cost centres.</p>	<p>He/She is able to observe the process of financial transactions and initiate necessary interventions such as reminders and dunning letters.</p>
<p>5. Supporting of internal business processes for sales and purchasing including quality management</p>	<p>He/She is able to arrange the administration processes for financial transactions, delivery etc. and monitor procedures of coordination between different departments taking into account religious, cultural and language aspects.</p>	<p>He/She is able to carrying through typical quality management tasks to ensure correctness and integrity of documents for selling, storage, transport and purchasing of goods.</p> <p>He/She is able to ensure well-functioning business processes by providing all staff and departments with information about changes regarding selling, purchasing and transport conditions (e.g. port handling tariffs, taxes) and he/she is able to take action to safeguard processes (e.g. insurance, licence, ...).</p>	<p>He/She is able to initiate projects concerning new business processes, exporting or importing new goods and developing concepts for widening and restructuring product portfolios and services</p> <p>He/She is able to carrying through related risk analysis.</p>



THEME Competence Matrix - Trade



<p>6. Observing and analysing foreign markets and foreign contexts</p>	<p>He/She is able to collect information (company data such as market share, turnover or history, current buyers, suppliers).</p> <p>He/She is able to produce statistics and figures as requested by the company.</p>	<p>He/She is able to identify specific strengths and measures required to determine the company's market position.</p> <p>He/She is able to obtain and prepare information about foreign markets, taking into account known indicators for market development (e.g. growth rate, productivity, ...).</p>	<p>He/She is able to analyse the results of market surveys and find indicators not only for customer wishes and future developments but also for comparing the company with its competitors.</p> <p>He/She is able to identify the risks of different financial, delivery and import/export structures.</p> <p>He/She is able to estimate potentials and risks for selling and purchasing on the basis of different product portfolios.</p>	<p>He/She is able to undertake market research in new markets and countries and assess the implications of respective cultural, religious and legal aspects (esp. intellectual property rights, trademarks) and regulations.</p> <p>He/She is able to monitor market trends systematically.</p> <p>He/She is able to identify strategic context factors and analyse them regarding their consequences for doing business in these markets.</p>
<p>7. Establishing cooperation structures with international partners</p>	<p>He/She is able to contact agents, international partners and official institutions (e.g. customs authorities) for organising and coordinating standardised selling and purchasing processes (e.g. arrangement of dates, collection of information about persons, flows and status of delivery, shipping ...)</p>		<p>He/She is able to find new potential partners, provide and coordinate possibilities of cooperation and initiate meetings with them.</p>	<p>He/She is able to arrange joint ventures and provide contractual details (e.g. technology licensing, patents, trademarks, intellectual property rights, conditions).</p> <p>He/She is able to identify barriers, tax and financial conditions and other information for decision processes like establishing company-owned sales agencies, shops or the assigning of responsibilities between partners.</p> <p>For these tasks he/she can cooperate with experts from different fields (lawyers, consultants) to obtain advice.</p>



THEME Competence Matrix - Trade



Abbreviations:

BOL B/L	<i>Bill of lading</i>
CMR	<i>Convention relative au contrat de transport international de marchandises par route (Frachtbrief)</i>
ERP	<i>Enterprise Resource Planning</i>
L/C	<i>Letter of Credit</i>
SOP	<i>Sales Order Process</i>
EUR 1	<i>EUR 1. movement certificate</i>



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.