

**Checklist**  
**Describing training functions for advance approval of vocational credit transfer for**

**Commercial Assistant, specializing in Sales**

Name of trainee:

Address:

Formal education:

Name of school/college in Denmark:

Name of company:

Address:

Telephone:

**Before the employment**

Period of employment:      from: \_\_\_\_\_ to: \_\_\_\_\_

In the work practice period, the trainee must be trained within the vocational areas described on the following pages.

The company confirms that training will take place in accordance with the specifications given.

\_\_\_\_\_  
Date and signature

Please send the checklist to OPU-Sekretariatet, Bindslevs Plads 1, DK-8600 Silkeborg, [piu@piu.dk](mailto:piu@piu.dk)

**At the end of the employment or work practice period**

At the end of the trainee's employment period, the trainee must present the checklist once more to the company for final confirmation.

It is hereby confirmed that the training has been provided in accordance with the specifications.

\_\_\_\_\_  
Date and company signature

\_\_\_\_\_  
Signature of trainee

Please hand over the checklist to the trainee.

# Checklist Commercial Assistant, specializing in Sales

## Introduction

When the trainee starts working for you he or she must receive a brief introduction to the company:

- Company policy and aims
- Company organisation
- Staff policy
- Information about products, suppliers, customers, sales conditions
- Information about the economy in the company – factors that contribute to the costs and benefits in the trainee's working functions.

After the introduction the trainee is able to carry out his job according to the company practice.

The introduction is compulsory and you hereby confirm that the trainee has received or will receive the introduction.

Date:

Signature and stamp:

Please find an overview of the possible work functions for the education below. The three main fields of the education are: Sales and Service, Administration of Sales and Calculation and Economy.

The required training goals in the boxes below are based on a 12 month placement. Should the trainee stay for a shorter period of time, the number of training goals can be adjusted accordingly.

The compulsory work functions are marked in grey.

Sales and Service		
<i>The already ticked functions are compulsory. Please tick 3 more functions in this box.</i>		
1	Sales and service profile in the company	x
2	Marketing profile and plan	x
3	Planning and execution of sales	x
4	Developing and maintaining customer relations	x
5	Planning, execution and conclusion of personal customer service	x
6	Segmentation of the customers	
7	Participation in product development	
8	Calculation of prices	
9	Execution of active sales	
10	Sales on electronic media	
11	Use of electronic media in the marketing and communication with customers	
12	Participation in the planning and implementation of activities and campaigns	
13	Preparation of sales letters and quotations	

## Administration of sales

*The already ticked functions are compulsory. Please tick 2 more functions in this box.*

14	Product knowledge, including origin, production and product specifications	x
15	Controlling price and quality	x
16	Preparing sales	x
17	Preparing sales letters or sales offers	x
18	Preparing standard offers	x
19	Handling of orders and contracts	x
20	Processing orders and contracts	
21	Maintaining sales systems	
22	Maintaining customer data	
23	Maintaining price and product information in the IT system	
24	Servicing in-house customers	
25	Participation in developing and adjusting the homepage and the e-trade	
26	Processing of complaints	

## Calculation and Economy

*The already ticked functions are compulsory. Please tick 1 more function in this box.*

27	Payment standards and means of payment	x
28	Price calculation	x
29	Calculation of costs	x
30	Budgeting sales or marketing activities	x
31	Budgeting product development	
32	Preparing key figures and statistics	
33	Electronic invoicing	
34	Use of national terms of trade and transportation	
35	Use of international terms of trade and transportation	

## Other work functions

*These functions are optional*

36	Assignments in the field of purchasing	
37	Assignments in the field of logistics	