

Occupational standard

Business administration specialist, level 5

The occupational standard is a document that describes the job and competence requirements, i.e. a set of skills, knowledge and attitudes required for successful job performance in a particular occupation.

The business administration specialist, level 5 occupational standard has been developed for the purposes of drafting of curricula and training programmes meeting the requirements of labour market.

Occupational qualification title	Estonian qualifications framework (EstQF) level
<i>Business administration specialist, level 5</i>	5

Specialisations and titles on the occupational qualification certificate	
Specialisation	Title on the certificate
Marketing and sales	Marketing and sales specialist, level 5
Production and service	Production and service specialist, level 5
Customer service	Customer service specialist, level 5
Purchasing	Purchasing specialist, level 5

Part A

Job description

A.1 Job description

A business administration specialist, level 5 is involved in the management of the company. The objective of the specialist's job is to support the company's activities.

A business administration specialist, level 5 is a person performing tasks requiring competencies in the field of economics and business as a first-level manager or specialist in a field. A business administration specialist is primarily employed in business enterprises and is specialised in a narrow field of activity of the company: marketing, sales, production or service process, customer service or purchasing process. The person's primary duties arise from the field of activity of the company, as well as its requirements and objectives, for example organising activities and use of resources, planning and implementation of marketing activities, organisation of sales, accounting, customer service and other. The person will be able to build up their qualification from various parts and thanks to options they are able to diversify their qualification for the purposes of many fields of activity.

A.2 Units

The job of a business administration specialist, level 5 is comprised of mandatory and specialisation-related units.

A.2.1 Supporting company management

- 1) Assisting in the development of the company's objectives and business model
- 2) Assisting in the company's marketing and sales activities
- 3) Planning of resources
- 4) Supporting the development of the organisational culture
- 5) Supporting innovation
- 6) Taking into account environmental requirements
- 7) Collecting and storage of information and documents
- 8) Organising human resources work

A.2.2 Accounting

- 1) Preparation of accounting documents
- 2) Verifying the correctness of accounting documents
- 3) Handling payroll calculations
- 4) Preparation of data for forecasting purposes
- 5) Analysis of the company's profitability and efficiency
- 6) Compiling of sector financial plans

Units of specialisation

A.2.3 Organisation of marketing and sales

- 1) Definition of customer requirements and expectations and customer groups
- 2) Pricing
- 3) Participation in the drafting of the marketing communication plan
- 4) Participation in the product development process
- 5) Support of marketing activities
- 6) Organisation of the sales process
- 7) Preparation of tenders
- 8) Compilation of sales data

A.2.4 Supporting the production and service process

- 1) Determination of resources
- 2) Monitoring of when orders are due

- 3) Drafting of documents
- 4) Monitoring of quality indicators
- 5) Conducting analyses
- 6) Compiling feedback
- 7) Monitoring the product development process and whether it is fit for purpose
- 8) Analysis and assessment of the product and service development and making recommendations
- 9) Making recommendations for development and innovations

A.2.5 Organisation of customer service

- 1) Organisation of customer service
- 2) Collecting customer feedback
- 3) Compiling and analysis of process and performance indicators
- 4) Resolution of complaints
- 5) Advising customers
- 6) Organising a working environment that is appropriate for customer service

A.2.6 Preparation and implementation of purchasing operations

- 1) Preparation of purchasing plan
- 2) Mapping of suppliers
- 3) Drafting of requests for quotes and invitations to tender
- 4) Preparation of negotiations
- 5) Administration of logistics operations, purchasing of logistics services and drafting of contracts
- 6) Monitoring and forecasting the demand for materials, products and services
- 7) Purchasing of logistics services
- 8) Making recommendations for changes
- 9) Preparation of documents for customs clearance

A.3 Working environment and specific aspects of work

The working hours of the business administration specialist are stable but situations may occur where working outside of the normal working hours may be highly necessary. The workplace is typically in an office but depending on the company there may be some business trips. In the course of the job it may be necessary to communicate with business partners from different cultures.

A.4 Tools

Hardware and software characteristic to the sector, means of presentation and communication and office supplies.

A.5 Personal characteristics necessary for this job: abilities and personality traits

The characteristics that a business administration specialist requires are initiative and learning ability, a readiness to collaborate and communicate, conscientiousness, reliability, honesty, sense of duty, accuracy, precision, decision-making ability and independence, determination, analytical thinking; ability to concentrate, generalise, adaptability, flexibility, creativity and innovation.

A.6 Occupational training

The representatives of this occupation conventionally have secondary education, vocational secondary education, vocational specialised education or higher education.

A.7 Possible job titles

First-level manager of a field, e.g. purchasing manager, sales manager, customer service manager, production manager, project manager, office manager, etc.; specialist of a field, e.g. purchasing specialist, sales specialist, production specialist, service specialist and jobs supporting the activities of other managers.

Part B COMPETENCE REQUIREMENTS

B.1. The structure of the occupational qualification

A business administration specialist, level 5 specialises in at least one area. In order to apply for the occupational qualification, a candidate is required to demonstrate obligatory competences (B.2.1, B.2.2) and transversal competences (B.2.7–B.2.14).

and to demonstrate competences related to specialisation B.2.3-B.2.6 as follows:

in case of specialisation

in marketing and sales specialist, additionally competence B.2.3 is required to be demonstrated;

in production and service specialist, additionally competence B.2.4 is required to be demonstrated;

in customer service specialist, additionally competence B.2.5 is required to be demonstrated;

in purchasing specialist, additionally competence B.2.6 is required to be demonstrated.

B.2 Competences

Obligatory competences

B.2.1 Supporting company management	EstQF level 5
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) assisting in the development of the company's objectives and business model in consideration of the principles of functioning of the economic and business environment and the company's core and support processes; 2) participates in the implementation of sales and marketing activities based on the company's sales and marketing strategy (including export plan); 3) plans the resources that are necessary and optimal for the activities in their field in consideration of the company's objectives and course of action; 4) supports the development of a human-centred organisational culture and behaves socially responsibly in consideration of business ethics and company values; 5) makes recommendations for the development and implementation of innovative solutions in consideration of developments in their field; 6) acts in an environmentally responsible manner in supporting the company's objectives in consideration of imposed requirements; 7) collects and stores information and documents based on their field of work and company and the specific nature of the document management system; 8) performs tasks related to personnel administration, recruitment, selection and development and drafts documents related to employment relations (for example employment contracts, job descriptions, working time recording tables, holiday schedule, shift schedules, occupational safety manuals, training plan) based on requirements stipulated by current legislation in force and the company's requirements. 	
<p><u>Supporting knowledge:</u></p> <ol style="list-style-type: none"> 1) principles of the economic and business environment and importance in society; 2) principles of business model development; 3) principles of management; 4) principles of writing a business plan; 5) principles of responsible business, including business ethics and environmental protection; 6) requirements stipulated with the Commercial Code and other necessary legislation, including legislation related to labour law; 7) principles of document and record management; 8) principles of project management and their application; 9) principles of organisational behaviour; 	

10) principles of human resource management.
<u>Assessment method(s):</u> practical assignment or written assignment or educational and work experience portfolio or interview

B.2.2 Accounting	EstQF level 5
<u>Performance indicators:</u>	
<ol style="list-style-type: none"> 1) compiles accounting source and summary documents (for example working time recording table, invoice proposals, documents related to business trips and inventory, documents related to costs and financial transactions) according to the provisions of the internal accounting policies and procedures and by drafting documents on paper and in an electronic environment; 2) verifies the correctness of accounting documents (invoice details, correctness of value added tax calculation) according to the provisions of the internal accounting policies and procedures; 3) handles payroll calculations according to standards provided or computer software; 4) prepares data for forecasting or reporting purposes based on the company's requirements and compiles statistical reports when instructed; 5) conducts profitability and efficiency analyses by using the key analysis methods; 6) collects input data for the purposes of preparing financial plans and budgets in the field and monitors the implementation of financial plans and budgets based on the specific nature of the company. 	
<u>Supporting knowledge:</u>	
<ol style="list-style-type: none"> 1) principles of accounting and business analysis, including principles of resource accounting (for example materials, people, equipment, IT); 2) key concepts and principles of accounting; 3) requirements stipulated by legislation regulating the field (laws, regulations); 4) accounting on the computer and operating principles of accounting software; 5) principles of payroll management; 6) principles of taxation and financing; 7) principles of statistics, including methods for data collection and presentation; 8) principles of cost accounting. 	
<u>Assessment method(s):</u>	
practical assignment or written assignment or educational and work experience portfolio or interview	

Competences of the specialisation

Marketing and sales	
B.2.3 Organisation of marketing and sales	EstQF level 5
<u>Performance indicators:</u>	
<ol style="list-style-type: none"> 1) defines customer requirements and expectations and customer groups in consideration of the service, product and company requirements; 2) collects data that is necessary for pricing and makes recommendations regarding pricing by using pricing principles as a basis and in consideration of the specific characteristics of the company; 3) participates in the drafting and implementation of the marketing communication plan, including the formulation of advertising messages based on the brand, advertising channel and target group; 4) participates in the processes of product development and design and service development and design in consideration of the market developments and customer requirements and expectations; 5) supports marketing activities (including export and online marketing), for example by updating product and service information, sales and market information, etc. by using different information sources according to the company's requirements; 6) organises the sales process (including export and online sales), for example prepares, instructs or carries out product presentations and client meetings and participation of the company at trade 	

<p>fairs;</p> <p>7) prepares tenders, tender documents and sales contracts, etc. in consideration of the company's requirements and agreements with customers;</p> <p>8) aggregates sales data for the purposes of conducting sales analysis.</p>
<p><u>Supporting knowledge:</u></p> <p>1) principles of marketing and sales;</p> <p>2) principles of product development and design;</p> <p>3) principles of advertising;</p> <p>4) principles of public relations;</p> <p>5) principles of administration of communication processes;</p> <p>6) requirements stipulated by legislation in the field (including Public Procurement Act, Law of Obligations Act, Consumer Protection Act);</p> <p>7) principles of drafting tenders, tender documents and contracts;</p> <p>8) principles of online marketing (including social media);</p> <p>9) principles of web administration.</p>
<p><u>Assessment method(s):</u> practical assignment or written assignment or educational and work experience portfolio or interview</p>

Production and service	
B.2.4 Supporting the production and service process	EstQF level 5
<p><u>Performance indicators:</u></p> <p>1) determines the existence of resources required for the fulfilment of orders, doing so in consideration of the company's operational process, including the use of planning software;</p> <p>2) monitors when the orders are due, notifies parties and prepares corrective action based on the order;</p> <p>3) prepares documents in terms of the content, language and technical details that are required in the production and service process based on requirements that are provided and the company's operational process;</p> <p>4) monitors the quality indicators of the production and service process and communicates any need for corrective action based on the company's operational process;</p> <p>5) conducts production and service process analyses and summaries based on the operational process and model provided;</p> <p>6) aggregates the feedback provided by various parties of the production and service process, summarises it and sends the results according to the operational process;</p> <p>7) monitors the product and service development process and whether it is fit for purpose according to the criteria provided;</p> <p>8) analyses, assesses and makes recommendations for product and service development and the launch of new products or services on the market according to feedback collected;</p> <p>9) makes recommendations for the implementation of innovative technologies, methods and other development activities based on the information collected and the specific characteristics of the company.</p>	
<p><u>Supporting knowledge:</u></p> <p>1) principles of production management;</p> <p>2) principles of service management;</p> <p>3) principles of quality management;</p> <p>4) innovative technologies and methods for applying them;</p> <p>5) principles of planning and software used for planning.</p>	
<p><u>Assessment method(s):</u> practical assignment or resolving case studies or written assignment or educational and work experience portfolio or interview</p>	

Customer service

B.2.5 Organisation of customer service	EstQF level 5
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) organises customer service that satisfies customers and/or serves customers according to principles of customer service and the objectives of the company; 2) collects and analyses customer feedback and sends recommendations according to the procedure implemented by the company; 3) aggregates and analyses process and performance indicators, draws conclusions and uses them for planning purposes and submits recommendations for improvement; 4) resolves customer complaints in consideration of conditions arising from legislation and through the involvement of various parties; 5) advises customers, up-sells, using various consultation and sales techniques for maintaining customer relationships; 6) organises that resources needed for work are in working condition, resolving problems in case of failure within their scope of responsibility. <p><u>Supporting knowledge:</u></p> <ol style="list-style-type: none"> 1) principles of customer-oriented service and its design process; 2) techniques of active listening and giving feedback; 3) sales techniques. <p><u>Assessment method(s):</u> practical assignment or resolving case studies or written assignment or educational and work experience portfolio or interview</p>	

Purchasing	
B.2.6 Preparation and implementation of purchasing operations	EstQF level 5
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) develops a purchasing plan for their area of responsibility in consideration of the company's overall strategy and carries out purchasing operations accordingly; 2) maps potential suppliers according to the criteria for selection of suppliers; 3) drafts requests for quotes and invitations to tender for the purchasing of materials/services/products in accordance with the purchasing plan and analyses tenders received according to the criteria that have been established; 4) prepares and organises negotiations with suppliers within their area of responsibility, taking into consideration the objectives of the company and drafts procurement and purchasing contracts according to the conditions established by the company; 5) administers incoming logistics operations and processes in an integrated manner by ensuring the existence of necessary documents, entry of data in the information system and correctness of the inspection of goods upon receipt; 6) monitors and forecasts demand for materials/products and services and usage according to the production or sales plan, ensuring optimal operational process and inventories; 7) purchases logistics services and drafts framework agreements with service providers, selecting the most optimal solution; 8) makes recommendations for implementing changes by taking into consideration feedback received concerning the quality and speed of goods delivery; 9) prepares customs clearance documents within the scope of their area of competence, taking into account customs regulations and formalities. <p><u>Supporting knowledge:</u></p> <ol style="list-style-type: none"> 1) fundamentals of logistics (including warehouse optimisation, software and stock records); 2) logistics service providers; 3) customs warehouses and customs regulations; 4) principles of freight insurance; 	

- 5) fundamentals of warehousing management;
- 6) principles of supply chain management.

Assessment method(s): practical assignment or resolving case studies or written assignment or educational and work experience portfolio or interview

Transversal competences of the occupation

B.2.7 Management and instruction	EstQF level 5
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) initiates actions and projects and makes relevant decisions in an appropriate and timely manner, assuming reasonable risks in consideration of the requirements of the field of work and the company's objectives; 2) defines the objective of a specific action/project within the scope of their area of responsibility and competence in accordance with their job tasks; 3) drafts an action/project plan, including a budget and schedule, defines risks based on the objective of the action/project and in consideration of the broader field of work and operating environment and potential changes; 4) manages and coordinates the work of the team in accordance with project stages, scope and objective, consciously selecting a management and leadership style that is appropriate for the situation and team; 5) manages and instructs the team in a single-minded and background-conscious manner, intervening in a timely fashion in critical situations and by providing timely and relevant feedback; 6) makes decisions by evaluating the potential consequences of decisions and in consideration of the whole picture and the need to shape and maintain the company's reputation; 7) as a manager acts as a role model for their team, managing time efficiently, arriving to work and meetings on time, adhering to the schedule and taking into consideration agreed-upon procedures, codes of practice and standards; 8) includes, motivates, encourages and supports team members by adhering to the objectives of the action/project and principles of good management; 9) carries out the actions required to conclude a project, including preparing the necessary reports based on the objective of the project. 	
<p><u>Supporting knowledge:</u></p> <ol style="list-style-type: none"> 1) principles of organisational behaviour; 2) principles of human resource management; 3) principles of management; 4) principles of project management. 	
<p><u>Assessment method(s)</u>: The assessment of transversal competences is integrated with that of other competencies specified in the occupational standard.</p>	

B.2.8 Communication and information sharing	EstQF level 5
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) effectively communicates with partners of a different position, cultural background and world view, taking into consideration the needs of the target group and ability to comprehend and by presenting the information in a clear, logical and comprehensible manner for the target group; 2) selects important information for presentation by analysing and structuring information obtained from various sources, based on evidence and facts; 3) selects an appropriate manner of behaviour and expression, listening to the partner and asking relevant questions and capably reacting to feedback received and to the situation; 4) creates and maintains relationships, expressing their viewpoints firmly and objectively, accepting their own and the needs of others; 5) is able to cope with unexpected situations and conflict situations by reacting capably and in a manner that is focused on resolving the situation; 	

- 6) presents ideas, solutions and other important messages persuasively on behalf of themselves and the company;
- 7) uses social networks and other electronic channels for communication according to the requirements and opportunities of the target group.

Assessment method(s): The assessment of transversal competences is integrated with that of other competencies specified in the occupational standard.

B.2.9 Cooperation and values-based approach

EstQF level 5

Performance indicators:

- 1) works together with individuals and within a team, with customers and colleagues by working efficiently and in accordance with principles of cooperation;
- 2) communicates in a constructive manner in various environments, accounts for differences in world views and opinions and regards them in a tolerant and respectful way;
- 3) includes colleagues and other partners in discussions, decision-making, adheres to collective rules and agreed-upon principles;
- 4) encourages and protects equal opportunities, does not base cooperation upon gender-based, ethnic, religious or other such attributes or sexual orientation and follows ethical beliefs and company values;
- 5) assumes responsibility for the decisions and actions of themselves and their team when facing the team and persons of various positions;
- 6) motivates, recognises and supports others by taking note of their contribution, effective action and needs;
- 7) adapts to the team, supports the effective action of the team, creates a team spirit, sharing their own knowledge and experience with their colleagues;
- 8) has a responsible attitude towards the surrounding environment and encourages others to do the same by acting in a responsible manner, adhering to agreed-upon rules and standards and principles of social responsibility.

Assessment method(s): The assessment of transversal competences is integrated with that of other competencies specified in the occupational standard.

B.2.10 Self-management

EstQF level 5

Performance indicators:

- 1) establishes objectives for self-development and develops themselves in a targeted manner by searching for and using various learning opportunities, by enjoying learning, taking an interest in one's own development and the development of the surroundings;
- 2) understands new information and tasks, connects them together with prior experience and learns new work techniques and methods, adapting to changing circumstances;
- 3) collects, arranges and uses information required for work and self-development;
- 4) learns from experience, assesses, analyses and adjusts their actions in accordance with their capabilities, opportunities and feedback;
- 5) determines their job tasks, the competences required to fulfil these tasks and their own role in a team and in the company;
- 6) adapts their communication style to different situations and people;
- 7) is able to cope with tension and stressful situations, as well as failure and criticism;
- 8) analyses failures, is able to learn from mistakes and maintains their self-confidence;
- 9) maintains a balance of work and personal life and takes care to maintain their health and capacity for work;
- 10) maintains a positive working state of mind.

Assessment method(s): The assessment of transversal competences is integrated with that of other competencies specified in the occupational standard.

B.2.11 Entrepreneurship	EstQF level 5
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) takes smart risks in the implementation of new ideas, acts and assumes responsibility for the outcome; 2) keeps themselves up to date with changes occurring in the economy and the actions of competitors; 3) acts responsibly, takes into account the economic, environmental and social impact and consequences of processes and actions. 	
<p><u>Assessment method(s):</u> The assessment of transversal competences is integrated with that of other competencies specified in the occupational standard.</p>	
B.2.12 Achieving results	EstQF level 5
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) works systematically, in an organised manner and efficiently; focuses on results and the accomplishment of personal work objectives; 2) sets high standards with regard to results, for example quality, quantity, customer relationships, work development and monitors that these are met; 3) sets job priorities; 4) works efficiently (uses their own resources and the resources of others appropriately and economically, acts in accordance with the means and environment at their disposal); 5) takes tasks/projects to their conclusion, works persistently and systematically with the aim to accomplish objectives; 6) seeks for new opportunities and different way to solve issues in case of obstructions. 	
<p><u>Assessment method(s):</u> The assessment of transversal competences is integrated with that of other competencies specified in the occupational standard.</p>	
B.2.13 Computer use	EstQF level 5
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) uses specialised software, selecting the most suitable ones among existing ICT tools or using software that is provided in modules AO1-AO7 and 12 (see Annex 1). 	
<p><u>Assessment method(s):</u> The assessment of transversal competences is integrated with that of other competencies specified in the occupational standard.</p>	
B.2.14 Language proficiency	EstQF level 5
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) is proficient in the official language to the extent of level B2; 2) is competent in at least one foreign language (preferably English or Russian) to the extent of level B1 (see Annex 2); 	
<p><u>Assessment method(s):</u> The assessment of transversal competences is integrated with that of other competencies specified in the occupational standard.</p>	

Part C

GENERAL INFORMATION AND ANNEXES

C.1 Information on the preparation and approval of the occupational standard, on the body awarding occupational qualifications, and reference to the location of the occupational standard in classifications	
1. Designation of the occupational standard in the register of occupational qualifications	14-01092014-01/7k
2. The occupational standard is compiled by:	Peter Gornischeff, <i>Estonian Chamber of Commerce and Industry</i> Aili Kõiv, <i>Foundation Innove</i> Aarne Leisalu, <i>Harju County Entrepreneurship and Development Consultancy (Harjumaa Ettevõtlus- ja Arenduskeskus)</i> Eela Malk, <i>Pärnumaa Vocational Education Centre (Pärnumaa Kutsehariduskeskus)</i> Anu Moosel, <i>Foundation Innove</i> Piret Pihel, <i>Association of Saaremaa Entrepreneurs (Saaremaa Ettevõtjate Liit), Saaremaa Development Centre (Saaremaa Arenduskeskus)</i> Riina Rohelaan, <i>HR Outsourcing OÜ (Estonian Consultants' Association)</i> Tiia Tammaru, <i>MTÜ Eesti Kvaliteediühing</i> Eneken Titov, <i>Estonian Entrepreneurship University of Applied Sciences (Eesti Ettevõtluskõrgkool Mainor)</i>
3. The occupational standard is approved by	Professional Council of Business Services and Other Business
4. Number of the decision of the Professional Council	18
5. Date of the decision of the Professional Council	01/09/2014
6. The occupational standard is valid until (date)	31/08/2019
7. Occupational standard version number	7
8. Reference to the Classification of Occupations (ISCO 08)	33 Business and administration associate professionals Customer service specialist, level 5; 3322 Commercial sales representatives Production specialist, level 5; 4322 Production clerks Service specialist, level 5; 3322 Commercial sales representatives; 4222 Contact centre information clerks Purchasing specialist, level 5; 3323 Buyers Marketing specialist, level 5; 2431 Advertising and marketing professionals
9. Reference to the level in the European Qualifications Framework (EQF)	5
C.2 Title of occupational qualification in foreign languages	
In English: Business Administration Specialist Specializations: Marketing and Sales Specialist Production and Service Specialist Customer Service Specialist	



ESF Program "Development of occupational qualifications system"

Purchasing Specialist