Repositioning ExplainiT in the market

Possibilities to increase the turnover per customer

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"Learning is not a product of schooling but the lifelong attempt to acquire it"
Albert Einstein

I. Preface

After finishing my bachelor study and all the necessary courses of my master study, I could finally start graduating. While looking at multiple organizations to do my master assignment, a friend of mine gave me a call and told me he knew someone that was looking for a master student to do an internship at ExplainiT in Hengelo. I thought: “Why not?” and went there for a conversation with Erwout Slot and Nico Kienhuis.

II

I noticed the informal culture at ExplainiT right away, it made me feel comfortable. The two managers presented the assignment and told me what they expected me to do. They would give me some respite to think about the assignment, but my decision was already made. After the conversation I got introduced to my future colleagues of ExplainiT: a very young team of ambitious and friendly people. After a few days I agreed on doing the assignment.

The research has taken place from 24 January till 21 July 2011. The execution of the assignment took place at ExplainiT, where I had my own desk, phone and computer. My first supervisor of the University of Twente was Dr. Kasia Zalewska-Kurek from the School of Management and Governance. My second supervisor was Ir. Björn Kijl, also from the School of Management and Governance.

II. Acknowledgements

I would like to thank my supervisor of ExplainiT and manager of the ResourcIT Group: Nico Kienhuis; and the manager of ExplainiT: Erwout Slot. Both gentleman helped me a lot during my research and gave me input where needed. They were always interested in my progress and when I had a problem, they came with the solution. Thanks Nico en Erwout!

Secondly, I would like to thank my supervisors at the University of Twente: Kasia Zalewska-Kurek and Björn Kijl. During our meetings, they gave me a lot of feedback and information to improve my report. Their expertise was very welcome and helped me out a lot. Thank you Kasia and Björn!

Thirdly, I would like to thank my colleagues of ExplainiT: Harold Koenjer, Ginie Otto, Rubel Bilgic, Marco Kooiker, Ruben Horstman, Bart Bakker, Han Eshuis, Justin ten Veen, Edo Beltman, Giel Hemme and Bart Blokhuis. They make the atmosphere at ExplainiT as unique as it is now: informal but professional. They are ambitious people, but always in for a joke. Thanks guys!

At last I want to thank my parents: Jolanda and Gerard Gortemaker. During all my college years, they were there for me when I needed them. Sometimes this was quite annoying, but at the end I know that without them I wouldn’t stand a chance at the university. Thanks mom and dad!

Without all these people, I would not be able to complete this assignment…

Denekamp, 10 October 2011

Martijn Gortemaker

III. Samenvatting

Onderzoeksprobleem

De aanleiding voor dit onderzoek is dat het bedrijf ExplainiT in Hengelo voor een dilemma staat. Het management is van plan om naast de persoonlijke ontwikkeling (vaardigheidstrainingen op het gebied van management, communicatie en ICT) ook aan organisatieontwikkeling te doen (in combinatie met consultancy) en om daarnaast nog MBO erkende opleidingen aan te gaan bieden. Het uiteindelijke doel is een stijging van de omzet per klant. Hoewel ExplainiT meer dan 1000 klanten heeft, is de totale omzet nog te laag. De trainings- en opleidingenmarkt biedt veel meer kansen en dit onderzoek moest aantonen of het aanbieden van bovenstaande diensten haalbaar is.

III

Onderzoeksvraag

De onderzoeksvraag luidt als volgt:

Hoe kan het huidige business model (en de waarde propositie) van ExplainiT omgevormd worden, om de omzet per klant te doen stijgen?

Onderzoeksmodel

Het onderzoek start met een interne - en externe analyse, waarna we de huidige situatie en business model van ExplainiT (en haar waarde propositie) behandelen. Een business model bestaat uit de elementen die, samengenomen, waarde creëren en leveren op de markt. Dit wordt ook weergegeven in de Business Model Canvas. Vervolgens is de potentiele toekomstige waarde propositie (organisatieontwikkeling en opleidingen) besproken. Daarna is het toekomstige business model en de Business Model Canvas behandeld. Het verslag eindigt met de resultaten, conclusies en aanbevelingen.

Onderzoeksmethode

Het onderzoek bestond uit een deskonderzoek, waarin ExplainiT en haar dienstverlening onder de loep werden genomen. Er is een theoretisch raamwerk opgesteld met behulp van wetenschappelijke artikelen en boeken. Daarnaast heeft er een veldonderzoek plaatsgevonden, dat bestond uit interviews (face-to-face en telefonisch). Uiteindelijk is de zogenaamde Business Model Canvas (het centrale model in dit onderzoek) van Osterwalder & Pigneur (2010) gebruikt om een delta analyse uit te voeren. De Business Model Canvas schetst het business model van een organisatie en verdeeld deze in 9 onderdelen: value propositions, key partners, key activities, key resources, cost structure, customer relationships, customer segments, channels en revenue streams. Omdat we een delta analyse uitvoerden, is deze canvas twee maal ingevuld: 1 maal met het huidige business model en eenmaal met het potentiele toekomstige business model.

Resultaten & conclusies

Het is zeker niet onmogelijk om beide nieuwe services succesvol te implementeren en te managen, hoewel de diensten nogal van elkaar verschillen. Het implementeren van organisatieontwikkeling zal betekenen dat ExplainiT dicht bij haar business model blijft. Eigenlijk wordt de huidige dienst op een nieuwe manier aangeboden (in combinatie met professioneel advies). In dat geval zal ExplainiT haar huidige imago, waarbij flexibiliteit ten opzichte van de klant zo belangrijk is, behouden. Consultancy wordt toegevoegd aan het begin van de channel fase: professioneel advies van consultants moet leiden tot de verkoop van meerdere trainingen. In het geval van organisatieontwikkeling zal het business model niet veel veranderen. De key activities blijven veelal gelijk en ExplainiT heeft geen nieuwe partners nodig (tenminste als ze de consultants aannemen). Ook de key resources, customer relationships en segments blijven bijna onveranderd. ExplainiT zal haar huidige service alleen in een nieuw jasje steken, wat kan leiden tot een hogere omzet per klant.

Als de organisatie overgaat tot het implementeren van erkende MBO opleidingen wordt het verhaal ingewikkelder. In dat geval krijgt ExplainiT te maken met vele regels, beperkingen en overheidsbemoeienis. Het is niet haalbaar voor ExplainiT om alle benodigde leraren en beoordelaars op de werkvloer een baan aan te bieden, om eigen examens te maken en de EVC procedure zelf aan te bieden. Dat is teveel van het goede en bovendien te duur en daarom zullen ze moeten samenwerken met externe partijen. De overheidsbemoeienis is groot, omdat zij er continu op toezien dat de kwaliteit van het onderwijs gehandhaafd blijft. Hetzelfde geldt voor de examens. Al dit bovenstaande resulteert in een verandering in de elementen key partners, key activities en key resources. Ook de channel, om de klant te bereiken, zal veranderen omdat samenwerkingsverbanden nodig zijn. Als ExplainiT opleidingen aan gaat bieden, dan zullen ze zich focussen op twee segmenten: secretary & support en marketing & sales. ExplainiT zal, als ze MBO opleidingen aan gaan bieden, haar huidige business model niet omvormen, maar echt veranderen. Maar dit kan ook gezien worden als een management uitdaging voor de langere termijn en het kan leiden tot een hogere omzet per klant. Als we de bovenstaande informatie combineren, komen we tot de volgende aanbevelingen.

IV

Aanbevelingen

Vergroot de huidige waarde propositie met organisatieontwikkeling, in combinatie met consultancy (voor de management - en communicatie trainingen). Consultancy voor ICT trainingen is overbodig, aangezien organisaties zelf kunnen bepalen of een werknemer een computer programma begrijpt en efficiënt en effectief gebruikt, of niet. Maak gebruik van je huidige krachten (flexibiliteit ten opzichte van de klant) om competitief voordeel te behalen. Daarbij is de accountmanager heel belangrijk. Hij moet ervan doordrongen zijn dat de klantrelaties de belangrijkste resources van ExplainiT zijn, en moet ongeveer alles in het werk stellen om de klant te helpen. Deze accountmanager is de enige contactpersoon van de klant en is de directe link tussen de klant en het management van ExplainiT. In dat geval zullen de communicatielijnen kort blijven.
Organisatieontwikkeling is eigenlijk niets meer voor ExplainiT, dan het aanbieden van de huidige dienst in een nieuwe verpakking. Alleen het advies/consultancy kan worden toegevoegd aan het verkoop proces en wel aan de start van dit proces. Dit advies kan leiden tot hogere verkoopresultaten. Het is relatief goedkoop om organisatieontwikkeling te implementeren als een nieuwe waarde propositie bij ExplainiT.

ExplainiT moet erop verdacht zijn dat als ze opleidingen implementeren als een nieuwe waarde propositie, dat het huidige business model zeker zal veranderen. Het zal meer overheidsbemoeienis en inspecties betekenen. Je hebt ook partners nodig (voor leraren, examens EVC, enzovoort). De juiste balans tussen partnerships en het rekruteren en zelf aannemen van nieuwe mensen, moet gevonden worden. ExplainiT kan geen partnerships creëren voor elk onderdeel van de value chain, maar ze kunnen ook niet alle mensen aannemen.
Als een verandering in het business model overwogen wordt, start dan niet met alle 6 opleidingen, maar bijvoorbeeld met slechts 1. Op die manier kan de markt nog enigszins afgetast worden (en het betekent ook minder kosten en risico's). Plan de implementatie van de opleidingen zorgvuldig en strategisch en bedenk in hoeveel jaar je over wilt gaan tot het aanbieden van deze nieuwe service. Deze waarde propositie kan zeker leiden tot een hogere omzet (per klant), maar het risico om (veel) geld te verliezen is ook groter. Het implementeren van MBO opleidingen is haalbaar, maar moeilijk. Het grootste obstakel is uitvinden welke onderdelen van de value chain ExplainiT zelf moet uitvoeren en welke personen ze moeten aannemen. Maar dit alles kan ook gezien worden als een management uitdaging. De keuze is aan ExplainiT…

IV. Summary

Research problem
The reason for this research is the fact that ExplainiT in Hengelo faces a dilemma. Management has intentions to offer, besides the current personal development (management-, communication- and ICT skill training courses), also organizational development (in combination with consultancy) and wants to see the possibilities regarding offering Intermediate Vocational Education (Dutch MBO studies). The eventual goal is to increase the turnover per customer. Although ExplainiT has more than 1,000 customers, the total turnover per customer is still too low. The training- and education market has much more to offer and this research should reveal the possibilities and the feasibility of offering the services mentioned above.

Research question
The research question is as follows:
How can the current business model (and value proposition) of ExplainiT be reshaped, to increase the turnover per customer?

Research model
The research starts with an internal - and external analysis, after which we describe the current situation or business model of ExplainiT and its value proposition. A business model consists out of the elements that, taken together, create and deliver value to the market. This is also outlined in a Business Model Canvas. After that, the potential future value propositions (organizational development and education) are described. Subsequently the future business model and the Business Model Canvas have been taken care of. We end up with the main results, conclusions and with recommendations.

Research method
The research itself consists of a desk research, where ExplainiT and her services are described. Also a theoretical framework has been drafted with the help of scientific literature and books. Besides the desk research, a field research has taken place that consists out of interviews and phone conversations. Eventually, the so-called Business Model Canvas (the central model in this report) of Osterwalder & Pigneur (2010) is used to perform a delta analysis. This Business Model Canvas outlines the business model of an organization and is subdivided into 9 parts: value propositions, key partners, key activities, key resources, cost structure, customer relationships, customer segments, channels and revenue streams. Because we performed a delta analysis, this canvas has been outlined twice: first for the current business model and second for the potential future business model of ExplainiT.

Results & conclusions
Implementing both potential value propositions is feasible, but they are quite different when it comes to implementing them. Organizational development means that ExplainiT will stick close to their business model. They offer their current service in a different way, in combination with consultancy. In this case, ExplainiT can maintain their image, whereby customization and the "personal touch" are so important. Consultancy will be added at the start of the channel phase: the professional advice of consultants should lead to selling more training courses. In case of organizational development, the business model will not change a lot. Key activities will largely stay the same and ExplainiT doesn't need new partners (if they employ consultants). Also the key resources, customer relationships and segments all remain almost unchanged. ExplainiT will offer their current service in a different wrapping, what can lead to a higher turnover per customer.

Implementing Intermediate Vocational Education is harder. In this case, ExplainiT will have to deal with a lot of rules, guidelines and restrictions. It is not feasible for ExplainiT to employ all teachers and assessors, make their own quality exams and offer the EVC procedure by themselves. Therefore, partnerships are needed. The interference from the government is big, because they monitor the quality of the offered education and the belonging exams. All the above will result in a change in key partners, key activities and key resources. Also the channel, to reach the customer, changes because of the partnerships needed. When offering education, ExplainiT will focus on just two segments: secretary & support and marketing & sales. ExplainiT will, when offering education, not just reshape their current business model, but really change it. But this can also be seen as a management challenge for the long-term and can lead towards a higher turnover per customer. These facts lead to the recommendations below.

Recommendations

Expand the current value proposition with organizational development, in combination with consultancy (for management - and communication training courses) as soon as possible. Consultancy for ICT training courses is not needed, because organizations can decide for themselves whether an employee is able to use a certain computer program efficiently and effectively, or not. Use the unique aspects of the current value proposition (customization and "personal touch") to reach competitive advantage. Hereby the account manager is very important. He should know that the customer relationships are the most important resource of ExplainiT and should do about anything to please that customer. That account manager is the only contact person of the customer and is the direct link between this customer and management of ExplainiT. In that way, communication lines will remain short.
Organizational development is for ExplainiT actually nothing more than offering the current service in a different wrapping. Only consultancy can be added at the start of the sales process. This consultancy should lead to more sales. It is relatively cheap to implement this "new service".

ExplainiT should realize that when they implement educations as a new value proposition, that their current business model will definitely change. Expanding the value proposition with educations means much interference and inspections from the government. You also need partnerships (for teachers, exams, EVC, etcetera). The right balance between partnerships and employing new people should be found. ExplainiT cannot create partnerships for all parts of the value chain, but they cannot employ all the people either.
In case ExplainiT does consider a real business model change, they should not start with all six educations, but with (for example) just one to explore the market (this also means less costs and risks). Plan the implementation of the educations strategically and decide in how many years you want to offer this new service. There is definitely more money and turnover involved in this value proposition than when we look at training courses. However the risk to lose money is also higher. Implementing educations is feasible, but hard. The biggest obstacle is determining which parts of the value chain ExplainiT should execute by itself and which persons they should employ. But this can also be considered a management challenge. The choice is up to ExplainiT…

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VI. Glossary

- **Adult education:** Education for people older than 18 years.
- **Beroepsbegeleidende leerweg (BBL):** A Dutch education type. It is a combination of working and learning. The student works at an organization and follows a study at the same time.
- **Beroepsopleidende leerweg (BOL):** A Dutch education type. The student spends its time at school, with short internships. The practice part is between 20% and 60%.
- **Business model:** Consists out of the elements that create and deliver value for customers.
- **Business Model Canvas:** Tool which allows organizations to "paint" pictures of existing or new business models.
- **Competitive advantage:** The strategic advantage organizations have over its competitors within the same industry.
- **Centraal register beroepsopleidingen (Crebo):** A collection of information about educations offered by paid and non-paid organizations. The crebo contains an overview of all educations offered by an organization. Every education has its own crebo-number.
- **College of Education:** Dutch authority that inspects the quality of education and exams.
- **Colo:** The union of all Dutch knowledge centres.
- **Competence-based education:** Aims for more practice situations in the study program. Students should acquire three elements (knowledge, skills, professional attitude) to get new competences and develop their existing ones. Also called "MBO nieuwe stijl".
- **Crebo number:** Every education/qualification has its own crebo number.
- **Customer value proposition (CVP):** The total sum of benefits which a customer gets from the vendor, in return for the payment.
- **Economisch en administratief beroeps onderwijs (ECABO):** The knowledge centre who aims at competence-based education, for economic-administrative-, ICT- and safety professions.
- **Employability:** The process of finding and maintaining a job.
- **End term based education:** The old fashioned way of offering educations. It is not about developing competences. Also called "experimental education" or "MBO oude stijl".
- **ENIC:** Network which gives advice and information about academic acknowledgement of diplomas and study periods abroad.
- **Ervaring verworven competenties/acknowledgement acquired competences (EVC):** The acknowledgement of a person's competences that took place in both formal and informal learning processes (at the workplace, at home, when you do volunteer work, etcetera).
- **Europass:** Established to offer European citizens the possibility to show their skills with the help of standardised documents.
- **Experimental education:** See "End term based education".
- **Five forces framework (Porter):** Management tool used to examine the environment of a company.
- **Intermediate Vocational Education:** Dutch education form. Educations at MBO level given by the ROC's and other institutions.
- **Lifelong learning:** Initial education is not enough for the rest of the working life. People should develop competences their whole life.
- **MBO nieuwe stijl:** See "Competence-based education".
- **MBO oude stijl:** See "End term based education".
- **NARIC:** Network which gives advice and information about academic acknowledgement of diplomas and study periods abroad.
- **Private Limited Company (PLC):** Company owned by shareholders and limited by shares. The liabilities of members is limited.
- **Recurring revenues:** multiple payments afterwards (e.g. when a customer attends a package of training courses).
- **Resource-based view (RBV):** Management tool, used to identify the (strategic) resources which are available to an organization to reach competitive advantage.
- **Regionaal opleidingen centrum (ROC):** Cooperation between educational institutions in Intermediate Vocational Education and adult education.
- **The Lisbon Pact/The Treaty of Lisbon:** A pact of the European Union, signed in 2007, to increase the knowledge economy and cooperation between member states.
- **Toetsloon:** In some cases, the salary of an employee has to be compared to the so called "toetsloon". This is a limit amount of which is determined that the employee may not earn more salary than this toetsloon.
- **Transaction revenues:** a one-time payment afterwards.
- **Value added tax (VAT):** A consumption tax on the purchase price.
- **Wet Educatie en Beroepsonderwijs (WEB):** Dutch law concerning the quality of education and exams.
- **Wet Vermindering Afdracht (WVA):** Dutch law, about fiscal subsidy agreements which will reduce the total training costs of organizations. An employer has to hand over less wage tax and industrial assurance.

1. Introduction

1.1 ResourcIT

ExplainiT is one of the five independent companies that belong to the ResourcIT group. This group consists out of: *4Connection*, *IT-to-IT*, *The Backbone, Hybrid-IT* and *ExplainiT* (figure 1.1). The core activities of the ResourcIT group are about ICT, project management, management and communication. The group is established in 1995 and is active in whole Netherlands.

1.1.1 Mission

"The ResourcIT group wants to adapt maximally to its customers and their desired services and solutions. Creating value for customers is always the most important. Within the business-like Microsoft spectrum we want to play a dominant role."

The core values of ResourcIT are:

- The client is nr. 1.
- Integrity.
- Passion.
- Speed.
- Fun.
- Teamwork.

(Website ResourcIT)

Figure 1.1: ResourcIT

1.1.2 Activities

The activities of 4Connection, IT-to-IT, The Backbone and Hybrid-IT are:

- *4Connection*: helps organizations with project management, knowledge management and quality management.
- *IT-to-IT:* specialist in problems about network- and development environment, mainly based on Microsoft Citrix and VMware technology and products.
- *The Backbone:* develops, implements and manages ICT infrastructures at organizations.
- *Hybrid-IT:* works with hybrid network environments. Expert in implementing Linux based solutions. (Website Hybrid-IT)

1.1.3 ExplainiT

ExplainiT is an organization, established in 2001, which is specialized in training and consultancy of management, communication and ICT skills. The organization offers over 100 training courses, spread out over 15 categories. They have more than 1,000 clients throughout The Netherlands. The focus lies on organizations with more than 100 employees. ExplainiT is working on individual development of their clients' employees. After all, the quality of organizations is determined by the quality of its employees. Therefore, investing in your employees by training them will always pay off in the future.

"ExplainiT is a service company with a practical approach. They will not interfere with their clients' line of action. On the other hand, they can be a pragmatic partner, teaching clients, their employees and teams the necessary skills to be able to realize the business targets. Apart from theoretical and educational experience, people working for ExplainiT also have a lot of practical experience to draw upon, since they are often employed for consultancy with their customers. Furthermore, all the training courses can be held in Dutch, English or German."(Website ExplainiT)

ExplainiT is a young company settled in Hengelo Overijssel (figure 1.2). The company hires mainly freelance trainers who take care of the training courses. For these courses, the customer has the possibility to train at 12 locations through The Netherlands. Besides that, ExplainiT offers in-company training courses at the location of the client. The work force of ExplainiT consists out of 1 manager, 1 financial manager, 2 sales managers and 7 account managers.

Figure 1.2: The head office of ExplainiT in Hengelo

1.2 Problem definition

ExplainiT offers management-, communication-, and ICT training courses to other organizations. Usually, these training courses take a few days and they can be held in-company or at a location of ExplainiT. One trainer works fulltime for ExplainiT, while all other trainers are working as freelancers. ExplainiT aims at a target group of approximately 4,000 organizations, of which about 1,000 are their client.
We can say that ExplainiT (a relatively small company) has a big customer file. But the total turnover of these 1,000 clients is still too low. It is obvious that when the turnover per customer can rise, the total turnover of ExplainiT can increase a lot. Summarized, the main problem is that the turnover per customer is too low.

1.3 Research objective

The objective of this research is to come with a few different scenarios to increase the turnover per customer. To make this possible, we need to reposition ExplainiT in the market. This means that we should find a way to offer more value to the clients. In other words: we need to reshape the business model of ExplainiT.
We will try to do this by offering two new services: education/schooling and organizational development. Education is like training courses, but it takes a lot longer (about 2 to 3 years). There are multiple ways how ExplainiT can offer these forms of education and the goal of this research is to find out what is the best way to do it. At the end of this research, the total picture should be unravelled and all the pros and cons about offering schooling should be clear. We will look at studies at MBO level, also called: “Intermediate Vocational Education”.

Organizational development is a way for organizations to improve as a whole. Unlike some competitors, ExplainiT is not offering this form of training yet. In practice, there will be multiple categories of organizational development, each consisting out of specific training courses. Employees can then attend these training courses and in that way organizations can develop itself in a certain category (e.g. team development, customer orientation, business communication).

1.4 Research questions

The research question is the central question which we try to answer. Our research question is as follows:

How can the current business model (and value proposition) of ExplainiT be reshaped, to increase the turnover per customer?

To answer the central research question, it is divided into multiple sub-questions. These sub-questions will be answered during the research and make sure it is possible to answer the research question at the end. Our sub-questions are:

1) *How is the current proposition of services organized and in what way does ExplainiT offer value to its customers at this moment?*

This first question should give a first impression about ExplainiT. What services does ExplainiT offer right now? How do they offer these services? To answer this question, we can look at the website of the company, at the "Trainingbrochure 2011" and ask employees of ExplainiT about the current services and values offered.

2) *How can an organization offer Intermediate Vocational Education and/or organizational development successfully?*

To answer this question, a competitors analysis should be executed. We will take a look at interesting competitors who offer Intermediate Vocational Education successfully. The same goes for organizational development. "Interesting competitors" means competitors who are like ExplainiT, so no educational institutions like ROC. Within ExplainiT, the account managers can come with useful information. Besides that, we can check the websites of the competitors.

3) *How will ExplainiT reach competitive advantage with the new services?*

There are multiple ways in which an organization can achieve competitive advantage. There is a lot of scientific literature about this subject, which will be used to explore this topic. Then it must be compared to ExplainiT. What are the most important current strengths and competences of ExplainiT, according to its employees and the management? ExplainiT should exploit those strengths and use them (if possible) for the new value propositions. We can ask management what the strengths of ExplainiT are according to them. Also the strategy that ExplainiT chases at this moment will be described here. The four generic strategies of Michael E. Porter will be used as the basis. It will be easier when ExplainiT can continue with the same strategy in the future.

4) *Is it better or necessary for ExplainiT to start partnerships at some points of the value chain, to reach their end goal?*

The best possible outcome of this research is that ExplainiT will be able to implement and execute all parts of the total schooling- and organizational development process by itself. However, it is not unimaginable that cooperating with a few partners will be more efficient. The answer to this question must come automatically during this analysis. The research is about making the education process and organizational development process clear, from A to Z. In that case, at the end it must give us a bright picture about what ExplainiT should do, also regarding possible partnerships.

5) *What are the possibilities regarding "Erkenning Verworven Competenties" and the "Wet Vermindering Afdracht"?*

EVC, or translated "Acknowledgement Acquired Competences", can be a useful tool to convince customers to train at ExplainiT. It states that education is not enough for the rest of your working life, it is all about developing competences these days.
The Wet Vermindering Afdracht, or WVA, is a Dutch law which can make it more attractive for organizations to invest in schooling. It is wise to investigate this law and see what possibilities will arise for ExplainiT. Interviews and research on the Internet should give us a better idea about the two concepts.

4

2. Theoretical framework

2.1 Introduction

In this chapter we will describe the theories and approaches that we will use during this research. To analyse ExplainiT, its services and environment, we will look at the business model of the company.

2.1.1 What is a business model?

A business model consists out of the elements that, taken together, create and deliver value to the market. They are made of concrete choices and the consequences of these choices. The business model converts (new) technology into economic value. Different designs of business models have different specific logics of operation and create different value for their stakeholders. The business model concept combines the inside-out and outside-in analysis.

2.1.2 Delta analysis

In this research, we will make use of a delta analysis. This means that we look at the current situation or business model of ExplainiT, compared to the ideal situation or business model. It will be an analysis of the company and its environment at this moment, compared to where the company wants to be in about 3 years. And which milestones the company plans for these coming years.

2.2 The business model elements

It is easy to find scientific literature about business models. However, it is hard to find a theory covering all aspects or elements of a business model. The central approach about business models in this research is the approach from Osterwalder & Pigneur (2010). The definition of a business model is, according to these authors, as follows: “A business model describes the rationale of how an organization creates, delivers, and captures value.”
The reason we have chosen their approach as our manual is that the authors know how to analyse the business model of a company. They extensively describe the elements of a business model and talk about how to create, change or reshape business models in order to create, deliver and capture value. We want to increase the value proposition of ExplainiT, and Osterwalder & Pigneur have given us a handbook which shows us how to do that. Their self-made figure, the so called “Business Model Canvas” (figure 2.1), will be a useful tool for our delta analysis. This figure allows you to paint pictures of your business model. We will fill in this model twice: one with the current situation of ExplainiT and the other with the desired or potential future situation.
According to the authors, a business model consists of 9 elements or building blocks. Roughly, these building blocks can be split into three parts: the internal analysis or left canvas/efficiency part (key resources, key activities, key partners and cost structure), the external analysis or right canvas/value part (customer segments, channels, customer relationships and revenue streams) and the value propositions.

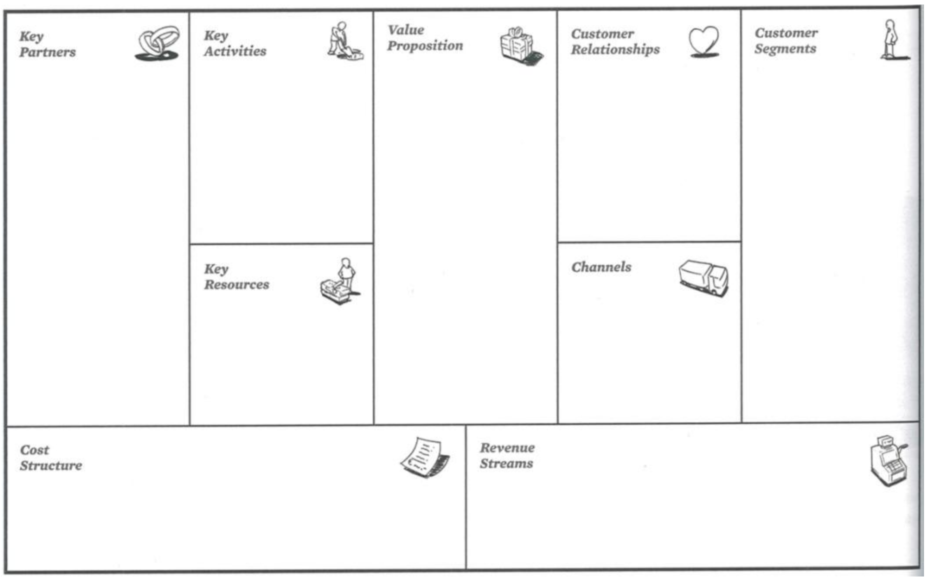


Figure 2.1: The Business Model Canvas

2.2.1 Customer segments

This building block "defines different groups of people or organizations an enterprise aims to reach and serve". Customers are of upmost importance and form the heart of any business model. No company will survive for long, when there are no customers. To better satisfy customers, a company can group them into distinct segments with common needs and behaviours. Then the company must make the decision about which segments to serve and which to ignore. When that decision is made, a business model can be designed around a strong understanding of specific customer needs. "Customer groups represent separate segments if:

- Their needs require and justify a distinct offer.
- They are reached through different distribution channels.
- They require different types of relationships.
- They have substantially different profitabilities.
- They are willing to pay for different aspects of the offer."

(Osterwalder & Pigneur, 2010)

2.2.2 Value propositions

"The value propositions building block describes the bundle of products and services that create value for a specific customer segment." Customer value proposition (CVP) is the reason why customers turn to one company or another. It solves a customer problem or satisfies a customer need. "The value proposition is a bundle of benefits that a company offers customers. Some value propositions may be innovative, others may be similar to existing market offers, but with added features or attributes." (Osterwalder & Pigneur, 2010)
Value can be quantitative (e.g. price, speed of service) or qualitative (e.g. design, customer experience). Some elements who can contribute to customer value creation are: newness, performance, customization, "getting the job done", design, brand/status, price, cost reduction, risk reduction, accessibility and convenience/usability.

Streamlining your business processes

Summarized, CVP is the total sum of benefits which a customer gets from the vendor in return for a payment. The theory is about the firm's value offered to their clients, to achieve customer satisfaction. In this way, organizations try to distinguish themselves from their competitors. How can ExplainiT expand its value proposition? Do they need to cooperate with partners? We need to look at the processes and resources and especially the unique resources of ExplainiT. Vantrappen (1992) underlines the importance of streamlining your business processes. Creating value for customers means that you have to take care of three steps: product creation (in our case service creation, new services), order delivery (training courses) and service assurance (upgrading training courses to the latest standards). Figure 2.2 shows the core processes for creating customer value.

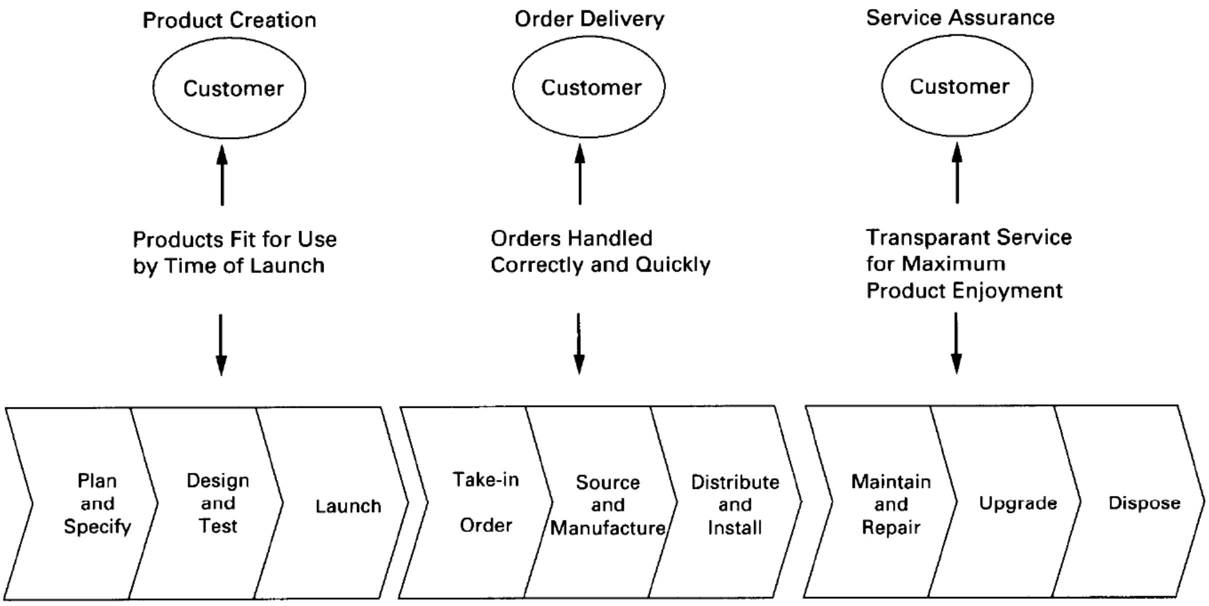


Figure 2.2: The core processes for creating customer value

"All competitors are bent on winning challenges. Therefore firms must decide where and how they will streamline their product/service creation process, order delivery process and service assurance process, so they will beat competitors in terms of quality, delivery and cost."
The generic micro-strategies which Vantrappen (1992) describes, can be helpful to optimize strategies. These are "gaining productivity" (doing the task better and faster), "avoiding waste" (is the task really necessary?) and "working in parallel" (advancing a task to coincide with another).

Linking competences to customer value

Organizations make use of their (unique) resources to offer value to customers. Möller (2006) links competences to creating customer value. He emphasises that the value creation of an individual organization is based on its collection of competences or capabilities. Value creation requires the cooperation of "teams of resources". These capabilities can range from single-task capabilities (e.g. a sales person's interaction skills) to cross-functional capabilities (e.g. new product development capability).

Customer satisfaction

All the above theories do pay a lot of attention to the value proposition of organizations. Mostly they include the process of how the creation and delivery of value is arranged. However, the reason why value proposition is so important is often left out, or at least send to the background. Oh (1999) did research about service quality, customer satisfaction and customer value. Especially customer satisfaction is important, because (as said above) other authors do not really analyse the causal path between perceived customer value and customer satisfaction. The author describes ways for measuring the quality of the service and customer satisfaction.

The Internet

Another important aspect nowadays is the influence of the Internet on business models. Levenburg (2005) is the only author who includes the Internet into the concept of delivering customer value. The majority of organizations use the Internet to enhance their company image, but greater pay-offs come from offering more online services and for post-purchase support. Delivering customer value online is getting more and more popular these days. There are a lot of training course suppliers on the market, who offer their training courses online. Perhaps, this is also a nice opportunity for ExplainiT. The approach of Levenburg can be helpful, as she made an analysis of delivering customer value online and explains which applications should be employed. The author also measures performance results of organizations who offer services online.

Differentiation and competitive advantage

Organizations compete based on their value propositions. They always try to differentiate from rivals and try to gain competitive advantage. They develop a competitive strategy to offer unique value to customers. This value can be quantitative and qualitative. For example, organizations offer value based on newness, customization, performance, price, risk reduction, cost reduction, usability, etcetera. With their future business model, ExplainiT wants to offer more value to customers, with an increase of the turnover as a result.
Chesbrough & Rosenbloom (2002) say that it is important to ensure that an innovation delivers value to customers. Therefore companies should discover a viable business model for creating this value. Their definition of a business model is: “The business model provides a coherent framework that takes technological characteristics and potentials as inputs, and converts them through customers and markets into economic outputs” (figure 2.3).
These authors help us to understand the very important role of the business model and give us practical examples from which we can learn. They distinguish six elements of a business model: value proposition, market segment, the structure of the value chain, the cost structure and profit potential, the position within the value network and the competitive strategy. Since we want to incorporate the competitive strategy element in our model, this approach of Chesbrough & Rosenbloom can be useful. The authors do pay attention to this element and how a company will attempt to develop a successful strategy to reach sustainable competitive advantage. That element is missing in the approach of Osterwalder & Pigneur (2010). This competitive advantage element will be integrated within the value propositions element of the Business Model Canvas. It will also come back in the chapters about the current and potential future business strategy.

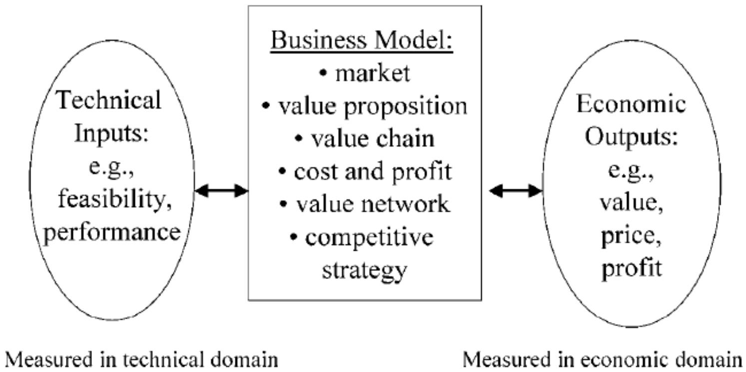


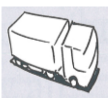
Figure 2.3: The business model mediates between the technical and economic domains

Business model innovation

To stay competitive, organizations have to innovate. Implementing new products/services or processes will help to stay ahead of competitors. We will use the approach of Chesbrough (2010) to involve innovation to the literature about business models. The author stresses the importance, the opportunities and barriers of business model innovation: “Companies can have huge investments and processes for exploring new ideas and technologies. But they often have little if any ability to innovate their business models through these inputs will pass.” Innovating business models only makes good sense. An average technology within a great business model is often more valuable than a great technology within an average business model.
Chesbrough divides a business model in roughly the same components as Osterwalder & Pigneur do (e.g. value proposition, market segment, revenue generation, cost structure, distribution, suppliers and customers). Also, like in his approach from 2002, Chesbrough (2010) mentions the importance of the competitive strategy to gain and hold advantage over rivals. Thereby innovating your business models and technologies is very important. The final reason we use this approach is that Chesbrough (2010) has also analysed the “Osterwalder’s 9 point decomposition of a business model”.

Johnson et al. (2008) support the point of view of Chesbrough (2010) about business model innovation. Just like Chesbrough (“a mediocre technology pursued within a great business model may be more valuable than a great technology exploited via a mediocre business model”), they underline the importance of a good business model. According to the authors, “it is about wrapping a good technology into a great business model. Great business models can reshape industries and drive spectacular growth.” Yet many organizations find business model innovation difficult. It is important to understand business model innovation.
Johnson et al. teach us when your current/old model will work, but also when a new business model is needed. They give us four elements that, taken together, create value: customer value proposition (the most important and central element), profit formula, key processes and key resources. There is some overlap with the approaches of Osterwalder & Pigneur (2010) and Chesbrough & Rosenbloom (2010). That’s why this theory will be used as a supplement on the first two approaches.

Every organization has its own business model and follows a certain strategy to offer value to the customer, in return for a payment. Innovation should make sure that those firms will stay competitive and keep improving their customer value proposition. Just like Chesbrough (2010) and Johnson et al. (2008), also Teece (2010) confirms the importance of innovation management compared to business models. “New communications and technology mean that customers have more choices. Businesses therefore need to be more customer-centric. This new environment has amplified the need to consider how to capture value from providing new products and services. Without a well-developed business model, innovators will fail to deliver or capture value from their innovations.” At the end, it is always about capturing and delivering value. “A good business model will provide considerable value to the customer and collect a viable portion of this in revenues.”
Again, we see similarities with the approach from Osterwalder & Pigneur when we look at the elements of a business model. But Teece (2010) also takes competitive advantage into account.



2.2.3 Channels

“The element “channels” describes how a company communicates with and reaches its customer segments to deliver a value proposition. Communication, distribution, and sales channels comprise a company’s interface with customers. Channels are customer touch points that play an important role in the customer experience.” Therefore they are very important for ExplainiT. Channels have several functions:

- “Raising awareness among customers about a company’s products and services.
- Helping customers evaluate a company’s value proposition.
- Allowing customers to purchase specific products and services.

- Delivering a value proposition to customers.
- Providing post-purchase customer support.”

(Osterwalder & Pigneur, 2010)
The goal is finding the right mix of channels. Customers do want to be reached in a certain way, and to satisfy that need is crucial in bringing the value propositions to the market. The authors distinguish direct and indirect channels, as well as “owned channels” and “partner channels (figure 2.4). The trick is to find the right balance between the different types of channels, to integrate them in a way to create a great customer experience and to maximize revenues.

Channel Types			Channel Phases				
Own	Direct	Sales force	1. Awareness	2. Evaluation	3. Purchase	4. Delivery	5. After sales
		Web sales					
	Indirect	Own stores					
Partner		Partner stores					
		Wholesaler					

Figure 2.4: The channel types and phases

2.2.4 Customer relationships

This is one of the most important building blocks for ExplainiT. “It describes the types of relationships a company establishes with specific customer segments.” Relationships can range from personal to automated. Customer relationships may be driven by the following motivations:

- Customer acquisition.
- Customer retention.
- Boosting sales (upselling).

Osterwalder & Pigneur (2010) distinguish different categories of relationships:

- “*Personal assistance:* Based on human interaction. The customer communicates with a real customer representative to get help during the sales process or after the purchase is complete.
- *Dedicated personal assistance:* Involves dedicating a customer representative specifically to an individual client. It represents the deepest and most intimate type of relationship and normally develops over a long period of time.
- *Self-service:* There is no direct relationship with customers.
- *Automated services:* Mix of customer self-service and automated processes.
- *Communities:* The use of user communities to become more involved with customers/prospects.
- *Co-creation:* Going beyond the traditional customer-vendor relationship to co-create value with customers (e.g. writing book reviews).”

(Osterwalder & Pigneur, 2010)
Also important for customer relationships are the rules, laws and subsidies of countries. There are multiple ways for suppliers in The Netherlands to make education easier, cheaper and more attractive for customers. The goal is to stimulate “lifelong learning”, which means that after the actual study, people continue learning their whole life (e.g. at the workplace or

with hobby's). Examples of instruments to stimulate lifelong learning are EVC and the law WVA-onderwijs. Mainly EVC is a hot topic these days with a big focus on developing competences instead of achieving knowledge. WVA is a law to reduce the costs of educating employees. Both instruments are a result of so-called Lisbon Pact.

The Lisbon Pact

The Lisbon Pact, or the Treaty of Lisbon, is a pact of the European Union, signed in Lisbon on the 13th of December 2007. This international agreement came after the Treaty of Rome, Maastricht and Amsterdam. The Lisbon Pact has consequences for schooling/education and the knowledge economy. The strategic goal of the pact is to make the European Union the most competitive and dynamic knowledge economy in the world. To achieve this, they aim for improving the quality of education- and employment systems and improving the access to education and training for everybody.

The pact itself does not lead to serious, big changes in the education- and employment policy. A new clause however, does guarantee that the European Union takes care of a higher level of education and employment. They should contribute to the quality of education by stimulating the cooperation between member states. This cooperation has led to certain action programs, which should help achieving the strategic goal. An example is a program they set up to stimulate "lifelong learning". Another EU initiative is to implement guidelines for mutual acknowledgement of employment qualifications. The networks NARIC and ENIC give advice and information about academic acknowledgement of diplomas and study periods abroad. The Europass was established to offer European citizens the possibility to show their skills with the help of standardised documents. (Website CIRCA)
An important initiative of this Lisbon Pact is EVC.

EVC

The Dutch abbreviation "EVC" means "erkenning verworven competenties", or literally translated: "acknowledgement acquired competences". It is known as a useful tool which fits in with lifelong learning. The starting point is that initial education is not enough for the rest of the working life. Getting knowledge is becoming less important, it is all about developing competences.
The development of these competences can take place in formal learning processes, but it also occurs in informal learning processes. For example at the workplace, at home, when you do volunteer work or when you are busy with a hobby. When these competences are comparable to formal qualifications, then it should be possible to acknowledge them. Every education consists out of certain competences, for example collaboration, networking, analysing, planning, organizing, handling pressure or problems, delivering quality, etcetera. ExplainiT will focus on six educations in 2 branches/domains: secretary professions and the salesman. The reason for this is that the current skills, expertise and competences of ExplainiT fit best those two domains.

EVC is a procedure for formal acknowledgement of learning in informal processes. It makes your talents visible and can have internal and external consequences. Internal at organization- or market level, external at qualification level. EVC is the bridge between working and learning and perhaps the right tool to show the individual the way to our knowledge economy or learning society. EVC is like a bottle that is half full: it shows just how full the bottle is and how it can be filled even further. It contributes to the development of individuals and amplifies the human capital management of organizations. (Duvekot, 2000)

Goals of EVC

We are living in a time where knowledge is getting quickly out-dated, where the knowledge intensity is increasing and procedures are changing and becoming more and more complex. In this so-called knowledge economy, it is necessary that everyone quickly and efficiently can learn new knowledge and skills. This concerns both workers and job seekers. Besides regular education, also other learning environments should play their part: training for employees, learning in the working environment or independent learning. Through accessible ways and without serious financial obstacles, people should be able to get acknowledgement for their competences, which are acquired outside formal education. These competences can lead directly to certification, exemptions or diplomas. The desirable goals of EVC are:

- *Improving the employability of employees or job seekers:* The possibility will increase for individuals to get on the labour market by showing which competences they already have and how they can be used and amplified.
- *Steering demand:* The education infrastructure should be transparent and flexible to be able to deliver the desired customized work.
- *Making learning flexible:* Acknowledging the acquired competences gives an incentive to continue learning, your whole life.
- *Optimizing other learning models:* Other learning environments and learning models have to be shaped and better used, because EVC also shows which learning environment or model fits best the individual. For example, a combination of working and learning at the workplace, mentoring/tutoring, independent learning, distance learning, etcetera.

The perspectives of EVC for certain groups

The impact of the use of this acknowledgement methodology in practice is big. EVC increases the interest for qualities people already have and these qualities can be expanded in the future. The effect of the EVC-systematics in The Netherlands offer perspectives to a lot of groups:

- *To the individual:* EVC shows the individual's competences. With this, people have a better insight in a personal career path.
- *To the company or branch:* EVC shows competences which are necessary to fill in different functions within the organizations. After that, the company can invest effectively in the training of personnel, because EVC clarifies the education opportunities.
- *To organizations that are busy with the reintegration of job seekers and labour management:* EVC offers perspective to new mediation possibilities for their customers.
- *To education:* EVC offers the challenge to formulate personal learning paths. With this, EVC stimulates new learning models that are attractive for people because of customized work and time saving (for example learning at the workplace).
- *To the government:* EVC offers possibilities to use policies and inputs effectively in the learning area, to stimulate lifelong learning and employability.

Competences vs. qualifications

The question is what competences one should have to practice a certain job. But what is the difference between the concepts *competences* and *qualification*?

Competences are qualities, talents or skills someone has and which can be obtained in different ways. It is the joint total of knowledge, skills and other personal qualities or attitudes.

Qualifications are the formal, standardised education demands. Qualification is about the formal acknowledgement of job performance in the form of certificates or diplomas.

Summarized we can say that competences are being developed, while qualifications are being assigned. (Duvekot, 2000)

Working area

The Dutch Stichting van de Arbeid defined the working area of EVC, based on employability segments, as follows:

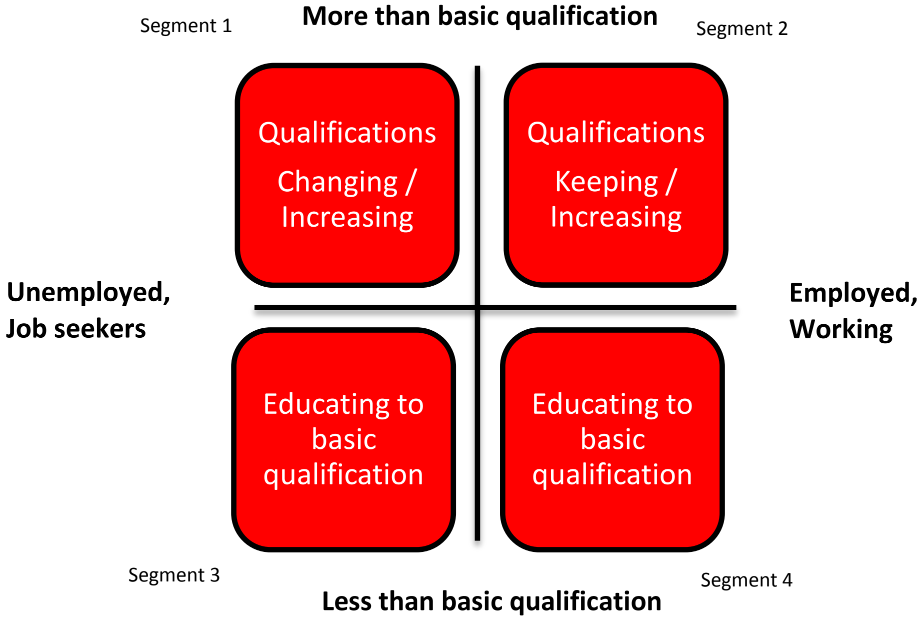


Figure 2.5: The working area of EVC (Duvekot, 2000)

EVC aims for all four segments. For the unemployed people or job seekers without basic qualification, EVC lowers the doorstep to go learning again, because EVC acknowledges that those job seekers have acquired competences in the past. For the unemployed people or job seekers above the level of basic qualification, EVC can take care of the retraining process. Or make sure that there will be no overlap in what competences individuals already have and what competences will be offered in the education path.

Dimensions

EVC consists of many parts or dimensions. Each dimension can be categorized within system requirements and procedural requirements. Each dimension has own responsibilities for individuals, organizations, government or social partners.

System requirements

The system requirements concern preconditions and facilities which have to be present at macro level, to utilize EVC optimally. For successful use of EVC, different preconditions have to suffice:

1) *The presence of assessment facilities.*

The assessment is a way to determine personal grow- and development possibilities. Information will be collected in a standardized way. Based on the outcomes, an advice will be given about possible future steps to develop and grow even more. The acknowledgement of competences will be done by assessors.

2) *High accessibility of the procedure.*

EVC-procedures have to be accessible for individuals and organizations. The concept *accessible* is related to “recognisability and acceptation”, “accessibility of organizations who accomplish the assessment procedures” and “the (reasonable) price of the procedures”.

3) *A system which secures the quality of the assessment procedure.*

Securing the quality is related to the validity of the used standard, the quality and accreditation of assessors and the quality system of assessment provisions.

4) *A usable assessment standard.*

When developing the EVC-systematics, one should take the qualification structures for the vocational education into account. With this, there is a guarantee for the civil effect of the qualifications acquired through EVC.

5) *A stimulating financial and legal framework.*

The financial and legal framework supports the EVC-systematics. The development and application of the systematics may not be slowed down or cancelled by financial or legal constraints. On the contrary, EVC should be supported financially and legally.

6) *A supporting (inter)national framework.*

On the knowledge area, it is important to organize the knowledge stream which is necessary to keep EVC actual. Knowledge exchange is hereby very important. The goal is to learn from others, both nationally and internationally.

7) *Measuring usability and return.*

To attract attention on the benefits of the EVC-systematics, it is relevant to give a clear picture about the usability and return in different situations. (Duvekot, 2000)

Procedure

EVC is as an individual procedure dividable in certain logical steps. As a matter of regular procedure, EVC consists of the following steps:

1) *Determining the goal of EVC.*

The acknowledgement of competences can have multiple goals. It can vary from valuing labour behaviour based on standards, to the evolvement of personal development plans.

2) *Developing carriage and realization.*

The execution of EVC-procedures, no matter what goal they chase, should always have the approval of the parties involved.

3) *Preparing the EVC-procedure (general).*

Based on the chosen goal, an assessment standard will be developed. Globally, we divide two types of goals and standards: rural acknowledgement based on rural acknowledged standards and company committed acknowledgement based on company standards.

4) *Preparing the EVC-procedure (for individuals).*

The individual candidates prepare for the EVC-procedure by inventorying and organizing their individual competences. At this moment, the vocational education and organizations use mainly portfolio models to monitor competences.

5) *Valuing (assessment).*

The EVC-procedure is mainly based on discovering which competences the candidates have. Crucial is that the acknowledgement aims at the prove a candidate delivers for its acquired competences. This prove can be delivered by showing the competences at the workplace. Assessors can take complementary interviews based on the assessment forms. It is also possible that the candidate delivers prove by showing references, programs of followed training courses or company education, showing photos or reports.

6) *Developing (advice and the sequel path).*

The EVC-procedure is based on employability. This means that after valuing, people can continue to learn and develop. It is not just about showing the candidate its competences, but also giving advice about career initiatives, for example about personal development plans. (Duvekot, 2000)

WVA-onderwijs

"WVA-onderwijs" is an abbreviation for a Dutch law, called "Wet Vermindering Afdracht onderwijs". With this fiscal agreement, employers can save a lot of money in educating their employees. According to the government, it is of great importance that employers keep investing in schooling of employees. Therefore there are certain fiscal subsidy agreements which will reduce the total training costs of organizations. Because of the Lisbon Pact, EU member states were urged to increase their investments in education to stimulate lifelong learning. The WVA law is a result of the Lisbon Pact. An employer has to hand over less wage taxes and industrial assurance. There is no permission needed from the tax authorities. There are however, certain administrative obligations and there is a so called "toetsloon" for certain categories of employees and for people younger than 25. For 2011, this toetsloon is determined at € 23,943.

The tax authorities have defined eight categories of employees and students for which this subsidy can be (partially) claimed:

1) An employee who follows professional skill training (beroepspraktijkvorming) of the apprenticeship training (beroepsbegeleidende leerweg or BBL).
2) An employee who is assigned as an assistant in education or as doctoral student at a university, or is assigned as researcher in education at the Nederlandse Organisatie voor Wetenschappelijk Onderzoek or the Koninklijke Nederlandse Akademie van Wetenschappen.
3) An employee who is assigned at a TNO (Dutch Organization for Applied Scientific Research).
4) An employee who works in the scope of a study in the Higher Vocational Education (hoger beroepsonderwijs or HBO).
5) An employee who is a former unemployed person, who attends schooling based on bringing him a starters qualification level.
6) A student who attends a learning-working path in the third or fourth learning year of the basic apprentice training learning path (basisberoepsbegeleidende leerweg) of the preparing secondary vocational education (voorbereidend middelbaar beroepsonderwijs or VMBO).
7) A trainee who attends an internship for at least 2 months in the scope of a vocational education (beroepsopleidende leerweg or BOL) at MBO-level 1 or 2.
8) An employee who attends an EVC-procedure at a recognized EVC-supplier.

(Website Belastingdienst)

This agreement and the corresponding subsidy, can make the total picture about EVC, WVA, lifelong learning, developing employees and the organization, even more attractive. It can be a nice extra instrument for the account managers of ExplainiT to sell their potential future service to clients.

When the employer pays the costs of the EVC-procedure, then he can apply this subsidy agreement. However, there are administrative obligations. The EVC-supplier has to be recognized by a classified authority. You will also have to save your declaration of this acknowledgement together with the administration of your wages. Per EVC-procedure, you can save up to € 329. You do not need to test it with the so called "toetsloon". The maximum amount one can claim with this law is € 2,738 a year per employee. This is the case when employees are attending the professional skill training of the BBL. Summarized, when you follow the EVC-procedure, you can save up a maximum of € 329, but when you attend a full study, this subsidy can rise a lot.

To be eligible for this subsidy, it is important that the education employment contract is finished off between the employer, employee and the academy. In this contract, the following points should be taken in:

a) The minimum number of course credits should be 60, of the total of 120 course credits for the whole education. Reaching this minimum is necessary to claim the subsidy.
b) The number of course credits the employee gets in the practice part of the education at the employer.
c) The number of periods (n) of the contract is at least 6 months or two times 4 months practice of 32 hours a week.

d) The nature and size of the guidance of the academy and the employer.
e) The realizable learning goals in practice and the belonging theory part.
f) The way of assessment of the practice part.
g) Payment and other working conditions.
h) The determination about winding-up the contract for didactic reasons.

The subsidy is valid as long as people meet the necessary conditions of the law, with a maximum of 24 months per employee. Figure 2.6 en 2.7 show some calculation examples regarding the subsidy of the WVA. (Website MVP)

Calculation example 1

Earning back the study costs when you complete a study

Total course price	€ 9,393
-/- Subsidy (2 years)	- € 5,476
Net course price	€ 3,917

Figure 2.6: WVA calculation example 1

Calculation example 2

What is the risk when you do not finish your study?
Even when you meet the minimal condition of 60 course credits in 2 years, you can be eligible for the WVA.

Internship (30 course credits)	€ 410
Study (29 course credits)	€ 3,489
Written report (4 course credits)	€ 360
Total course price	€ 4,259
-/- Subsidy (2 years)	- € 5,476
Estimation payment because you did not complete the full study	€ 1,500
Net course price	€ 283

Figure 2.7: WVA calculation example 2

2.2.5 Revenue streams

This element "represents the cash a company generates from each customer segment". Often, the customer is the heart of a business model and revenue streams are its vessels. A company must ask itself: For what value is each customer segment willing to pay? Successfully answering that question allows the firm to generate one or more revenue streams from each customer segment.
"A business model can involve two types of revenue streams:

- Transaction revenues resulting from one-time customer payments.
- Recurring revenues resulting from on-going payments to either deliver a value proposition to customers or provide post-purchase customer support."

There are several ways to generate revenue streams:

- *Asset sale:* selling ownership rights to a physical product.
- *Usage fee:* generated by the use of a particular service. The more a service is used, the more the customer pays.
- *Subscription fees:* generated by selling continuous access to a service (e.g. a gym sells its members monthly or yearly subscriptions in exchange for access to its exercise facilities).
- *Lending/Rending/Leasing:* this stream is created by temporarily granting someone the exclusive right to use a particular asset for a fixed period in return for a fee.
- *Licensing:* generated by giving customers permission to use protected intellectual property in exchange for fees.
- *Brokerage fees:* derives from intermediation services performed on behalf of two or more parties.
- *Advertising:* this revenue stream results from fees for advertising a particular product, service, or brand.

"There are two main types of pricing mechanism: fixed (predefined prices are based on static variables) and dynamic pricing (prices change based on market conditions)."
(Osterwalder & Pigneur, 2010)

2.2.6 Key resources

This element of the business model describes the most important assets required to make a business model work. "Key resources allows an enterprise to create and offer a value proposition, to maintain relationships with customer segments, to reach markets and to earn revenues. These key resources can be physical, financial, intellectual or human. They can be owned or leased by the company or acquired from key partners."
(Osterwalder & Pigneur, 2010)

2.2.7 Key activities

The element "key activities" describes the things a company must do to make the business model work. It is about the most important actions an organization must take to operate successfully. They are required to create and offer a value proposition, to maintain customer relationships, to reach markets and to earn revenues.
"Key activities can be categorized as follows:

- *Production:* activities related to designing, making, and delivering a product in substantial quantities or of superior quality.
- *Problem solving:* activities of this type relate to coming up with new solutions to individual customer problems.

- *Platform/network:* business models with a platform as a key resource are dominated by platform or network-related key activities. Networks, matchmaking platforms, software, and even brands can function as a platform."

(Osterwalder & Pigneur, 2010)

2.2.8 Key partners

The building block "key partners" describes the total network of suppliers and partners that make the business model work. Partnerships are there for many reasons and are an important element of many business models. Alliances are created to minimize risks, to optimize business models and to acquire resources. Osterwalder & Pigneur (2010) distinguish four different types of partnerships:

1) Strategic alliances between non-competitors.
2) Coopetition or strategic partnerships between competitors.
3) Joint ventures to develop new businesses.
4) Buyer-supplier relationships to assure reliable supplies.

"The authors distinguish three motivations for creating partnerships:

- *Optimization and economy of scale:* designed to optimize the allocation of resources and activities. These are usually formed to reduce costs and often involve outsourcing or sharing infrastructure.
- *Reduction of risk and uncertainty:* partnerships can help reduce risk in a competitive environment characterized by uncertainty.
- *Acquisition of particular resources and activities:* most companies extend their own capabilities by relying on other firms to furnish particular resources or perform certain activities. Such partnerships can be motivated by needs to acquire knowledge, licenses, or access to customers."

(Osterwalder & Pigneur, 2010)

2.2.9 Cost structure

"This building block describes the most important costs incurred while operating under a particular business model. Creating and delivering value, maintaining customer relationships and generating revenue all incur costs. Some business models are more cost-driven than others. It can be useful to distinguish two broad classes of business model cost structures: cost-driven (focus on minimizing costs) and value-driven (focus on value creation). Many businesses fall in between these two extremes. Cost structures can have the following characteristics:

- *Fixed costs:* remain the same despite the volume of goods or services produced.
- *Variable costs:* vary proportionally with the volume of goods or services produced.
- *Economies of scale:* cost advantages that a business enjoys as its output expands.
- *Economies of scope:* cost advantages that a business enjoys due to a larger scope of operations."

(Osterwalder & Pigneur, 2010)

Figure 2.8: The idea of the Business Model Canvas

2.3 Linking strategy and business model analysis

A great business model on its own is not enough to be successful in the market. It has to be linked to a business strategy and operations to assure competitive advantage. This section is there to show this link between the business strategy, business model and business processes.
Once implemented, the gross elements of business models are often quite transparent and easy to imitate. All firms chase one or multiple goals and follow a certain strategy. But what is exactly the difference between a business model and a business strategy? A business model is more specific than a business strategy. Al-Debei & Avison (2010): "A business strategy explains how organizations hope to do better than their rivals, while a business model describes how the pieces of a business all fit together." In today's businesses, there is usually a lot of uncertainty, a dynamic environment, a high level of competition and innovation. These days, there is a gap between the business strategy and business processes (figure 2.9) and the business models are there to fill this gap (figure 2.10).
Coupling strategy and business model analysis is needed to protect competitive advantage resulting from new business model design. Strategy analysis is therefore an important and essential step in designing a competitively sustainable business model. That is the reason why we use this approach of Teece (2010).

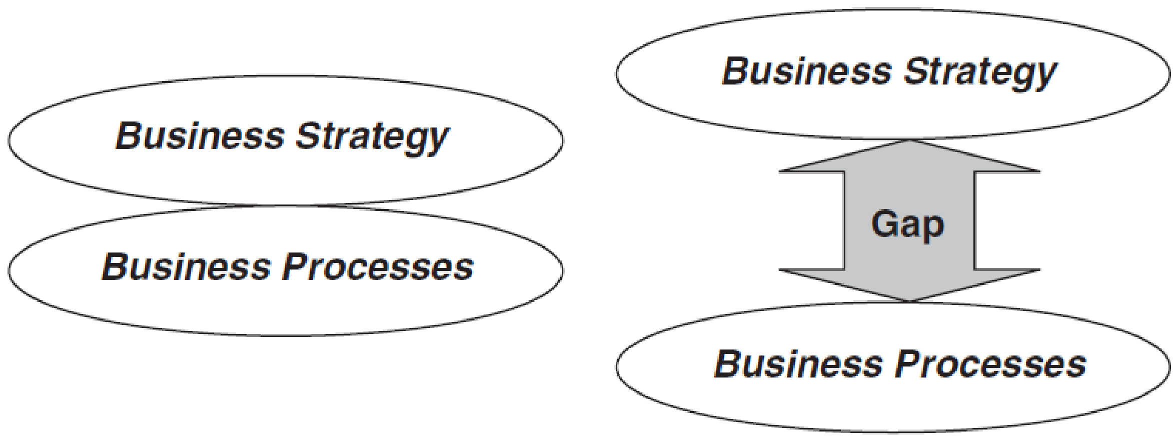


Figure 2.9: The traditional and progressive business world

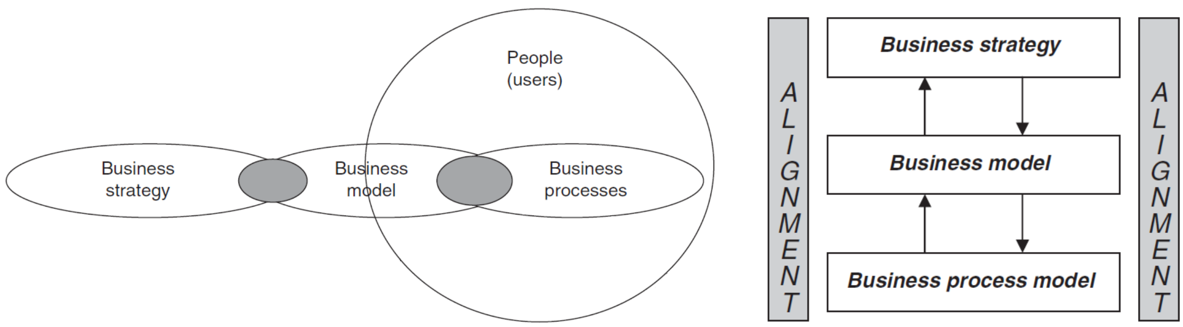


Figure 2.10: The business model fills the gap between the business strategy and processes

Nevertheless, strategy and the business model are different constructs. Casadesus-Masanell & Ricart (2010) see a business model "as a reflection of the firm's realized strategy". "In simple competitive situations there is a one-to-one mapping between strategy and the business model, which makes it difficult to separate the two notions. But the concepts of strategy and the business model differ when there are important contingencies on which a well-designed strategy must be based." The authors also make a clear distinction between strategy and tactics.
Globalization, deregulation and technological change are clearly changing competitive strategies. "The fastest growing firms in the new environment appear to be those that have taken advantage of these structural changes to innovate in their business models so they can compete differently. Next to the business model innovation drivers above, much recent interest has come from two other environmental shifts: advances in ICT and new strategies for the 'bottom of the pyramid' in emerging markets." All these drivers have led to business model innovation and the continuous need to (re)shape your tactics, strategy and business model. The authors say that there is a lack of a clear distinction between the notions of business models, strategy and tactics. Therefore they present a framework to distinguish and relate these concepts:

- "*Business model:* refers to the logic of the firm, the way it operates and how it creates value for its stakeholders.
- *Strategy:* refers to the choice of business model through which the firm will compete in the marketplace.
- *Tactics:* refer to the residual choices open to a firm by virtue of the business model it chooses to employ."

Figure 2.11 shows the relations between these concepts in detail.

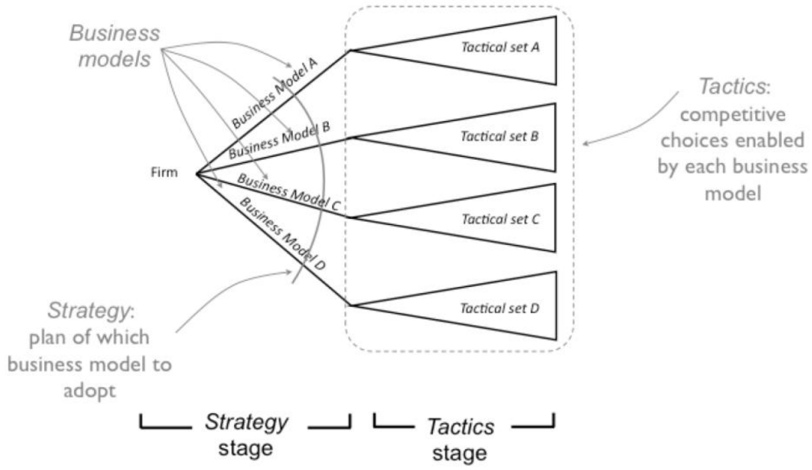


Figure 2.11: The relationship between business models, strategy and tactics

Summarized, Cacadesus-Masanell & Ricart (2010) also underline the importance of business model innovation nowadays. ExplainiT needs to follow their own competitive strategy to compete against rivals. This approach can be helpful to examine the business model, strategy and tactics of ExplainiT.

A business model is for sure not a strategy. Most views on strategy have one thing in common: the element regarding making choices. "Business models reflect these choices and their operating implications. They facilitate the analysis, testing and validation of the cause-and-effect relationships that flow from the strategic choices that have been made." (Shafer et al., 2005)

Shafer et al. also discuss the four problems of business models:

1) "Flawed assumptions underlying the core logic;

A firm moves into a danger zone if its business model's core logic is based on flawed or untested assumptions about the future.

2) Limitations in the strategic choices considered;

A business model should address all of the firm's core logic for creating and capturing value, not just a portion of that logic.

3) Misunderstandings about value creation and value capture;

Many executives have a tendency to focus so much on the value creation part of the model that the value capture portion is ignored or at least down-played.

4) Flawed assumptions about the value network;

Sometimes, a model mistakenly assumes that the existing value network will continue unchanged in the future."

This approach has been chosen because it can be used as an addition to the approaches of Teece (2010) and Casadesus-Masanell & Ricart (2010) and because it analyses the problems of business models. From these problems we can learn when we are reshaping the business model of ExplainiT.

Michael E. Porter (1985) distinguishes four "generic strategies": cost leadership, differentiation, cost focus and differentiation focus (figure 2.12). "A business strategy explains how organizations hope to do better than their competitors." (Al-Debei & Avison, 2010) It is about how a business competes successfully in a particular market. Johnson & Scholes (1999) define strategy as: "the direction and scope of an organization over the long term: which achieves advantage for the organization through its configuration of resources within a changing environment, to meet the needs of markets and to fulfil stakeholders expectations."

Target Scope	*Advantage*	
	Low Cost	Product Uniqueness
Broad (Industry Wide)	Cost Leadership Strategy	Differentiation Strategy
Narrow (Market Segment)	Focus Strategy (low cost)	Focus Strategy (differentiation)

Figure 2.12: The four generic strategies of Porter

Cost Leadership

The organization aims for being the low cost producer in the market. Such an producer always tries to find sources of cost advantage. It offers products/services at or below the average industry price.

Differentiation

The firm wants to be unique in the industry. It often aims for one or a few important attributes and then positions itself to meet those needs. These products/services are offered at premium prices.

Cost Focus
The organization focuses itself on a certain market segment and seeks a cost advantage in that segment.

Differentiation Focus
The company seeks differentiation in a certain market segment.

As said, the business model combines the inside-out or internal analysis (resource driven) and the outside-in or external analysis (market driven). Both are important to investigate ExplainiT and its environment.

2.4 Internal analysis

The internal analysis is an analysis of the organization itself. In our case, it is an analysis of the left part of the canvas: key partners, key activities, key resources and cost structure. An internal analysis is there to reveal the strengths and weaknesses of an organization. These internal factors can create or destroy value, that's why they are important. They must me managed correctly to be able to offer value to customers. We will take a look at these resources available to ExplainiT to reach competitive advantage. Therefore we make use of the so called "resource-based view".

2.4.1 Resource-based view

The resource-based view (RBV) is the central concept in this internal analysis. It is a management tool used to identify the available strategic resources. The RBV says that the firm's success is largely driven from resources that have certain special characteristics. This theory acknowledges that capabilities that are unique, are important for achieving sustained competitive advantage.
Galbreath (2005) underlines that "a firm's success is largely determined by the resources it owns and controls". Resources are normally defined as assets or capabilities. Assets are the resources owned by the company (either tangible or intangible), while capabilities are "intangible bundles of skills and accumulated knowledge exercised through organizational routines". Galbreath includes in his research what resources matter the most for organizations. The assets and capabilities a company has, can be important factors of sustainable competitive advantage and superior firm performance, but only if they possess certain special characteristics. The author distinguishes tangible resources (financial assets/physical assets) and intangible resources (intangible assets/skills). The Resource Portfolio (figure 2.13) gives a nice overview of the difference between assets and skills, and between intangible and tangible resources. We should define the resources of ExplainiT, and see which ones matter the most for their success.

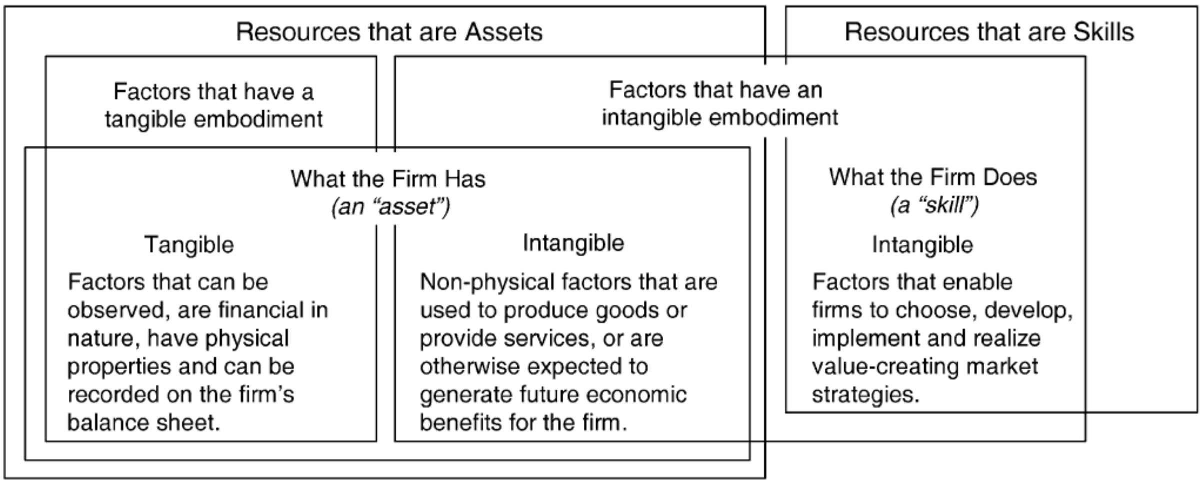


Figure 2.13: The Resource Portfolio

Only those resources that are rare, valuable, inimitable and non-substitutable are able to generate competitive advantage. But how do you identify the valuable resources of an organization? Bowman & Ambrosini (2007) propose in their research an approach to resource identification of a firm. A clarification of what “valuable” means is very important. “A valuable resource must enable a company to do things in ways that lead to high sales, low costs, high margins, or in other ways add financial value to the firm.” Another aspect that the authors address attention to, is “the issue of competitive disadvantages that may counteract the positive benefits of resources”. It is interesting and good to know that some actions of firms can lead to competitive disadvantages. These disadvantages then lead to, for example, lower sales volume, lower margin and lower profit. This research is valuable for us, because it brings our attention to the impact of resources on profit flow. Organizations always look at competitive advantage, but seem to forget competitive disadvantage.

However, it is of course important for an organization to follow a certain strategy to reach competitive advantage. Coates & McDermott (2001): “The uniqueness of the firm lies in the way they bundle resources and capabilities.” Every organization has its own way of using their assets, skills, abilities and knowledge. Firms can get a competitive advantage when they make good use of the internal resources available and developed within the firm . Nath et al. (2010) also underline the impact that a firm’s functional capabilities and diversification strategies can have on performance. Unique competences are hard to imitate, and that is a way how ExplainiT can defeat their rivals. The company can pursue and develop new opportunities by offering education and organizational development.

Which resources do really matter to the company? Which resources are needed to offer education? With the use of the literature above, we will reveal the strengths and weaknesses of ExplainiT.

2.4.2 7-S framework

To identify the resources, we make use of the 7-S framework (figure 2.14). This framework describes the seven factors to organize a company effectively: strategy, structure, systems, style, staff, skills and shared values.

- “*Strategy:* plans for the allocation of resources to reach identified goals.
- *Structure:* the way how organization’s units relate to each other.
- *Systems:* the procedures, processes and routines that characterize how the work should be done.
- *Style:* culture of the organizations and how managers behave in achieving goals.
- *Staff:* number and types of personnel in the organization.
- *Skills:* distinctive capabilities of personnel or of the organization as a whole.
- *Shared values:* the centre of the model. Shows where the organizations stands for and where it beliefs in.”

(Website 12manage)

All these factors are interdependent: paying less attention to one factor, can mean that it influences other factors as well. The framework is often used to improve the performance of the organization, to examine the likely effects of future changes and how best to implement a proposed strategy. We use it to get a short overview of how the elements and resources are managed at ExplainiT and to watch at the likely effects of the future changes which ExplainiT faces. It can be helpful for determining the right strategy (and with it the business model).

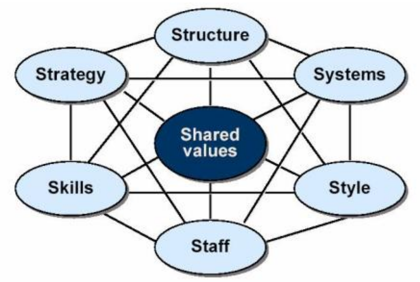


Figure 2.14: McKinsey's 7-S framework (Website 12manage)

2.5 External analysis

In practice, business models are changing continuously. They are dynamic, because of changes in market, technology and regulatory environments. Regulation can be seen as a critical factor for business models. Regulatory environments, technological quality and user acceptance could be included in business models. (Kijl & Nieuwenhuis, 2011)
In the Business Model Canvas, the external environment (the right part of the canvas) includes: customer relationships, customer segments, channels and revenue streams. In this BMC, the three factors mentioned above (rules/regulations, technology and user acceptance) can be included.

A useful tool to analyse the environment of ExplainiT, is Michael E. Porter's five forces framework (figure 2.15). Porter (2008) distinguishes five forces that shape industry competition. There are four forces that have influence on *the rivalry among existing competitors: threat of new entrants, threat of substitute services, bargaining power of buyers and the bargaining power of suppliers.* When you fill in this model for an organization, you will get a bright picture of the environment of that firm. This model gives an overview of all stakeholders, like customers and suppliers and their interests. It can give information about the strategic position a company should possess. It will help with determining the right strategy. (Johnson & Scholes, 1999)
The aim is to identify if there are factors in the environment that influence the capability of an organization to position itself in such a way, that you receive competitive advantage. That is also the reason why we have chosen this model. We need to know how ExplainiT can reach competitive advantage.
We will start the analysis from the centre, with the competition in the industry. From that point, we will fill in the model. For example: if it is common in the industry to compete based on low costs, than it would be less attractive and difficult for new organizations to enter the market (because profits decrease). That way, we must find out how ExplainiT can best distinguish itself from competitors.

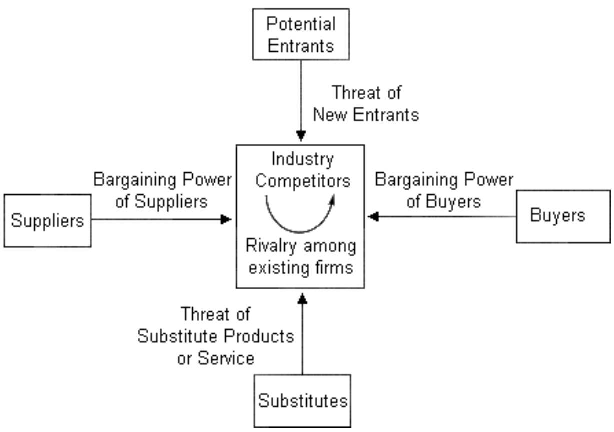


Figure 2.15: The five forces framework (Website 12manage)

<u>The threat of entry</u>
The threat of entry to an industry will depend on the extent to which there are barriers to entry. Most typically, these are: economies of scale, the capital requirement of entry, access to distribution channels, cost advantages independent of size, expected retaliation, legislation or government action and differentiation.

<u>The power of buyers and suppliers</u>
The relationship with buyers and sellers can have similar effects in constraining the strategic freedom of an organization and in influencing the margins of that organization. Some organizations, like ExplainiT, may rely on supplies other than tangible goods. In that case, the availability of skilled staff is crucial.

<u>The threat of substitutes</u>
The threat of substitutes can take different forms: product-for-product substitution, substitution of need, generic substitution and doing without. Substitutes can place a ceiling on prices for products of the organization or reduce market attractiveness.

<u>Competitive rivalry</u>
Companies must be concerned with the fact of direct rivalry between themselves and competitors. "The most competitive conditions will be those in which entry is likely, substitutes threaten and buyers or suppliers exercise control." (Johnson & Scholes, 1999)

2.6 Combining the internal and external analysis

The results of the internal and external analysis will be combined, by joining them in the future Business Model Canvas. This figure gives an overview of the (potential) future business model of ExplainiT, with the educations included. Shortly, this report shows the current business model and the ideal business model of ExplainiT, and how to get there (figure 2.16).

2.7 Confining the research

In this research, we focus on repositioning ExplainiT in the market. This is still very broad, but we narrow this down to offering education/studies and organizational development. Other types of services ExplainiT can offer will be left out. All the conversations, interviews, etcetera will be based on the possibilities for ExplainiT to offer the programs above, and all the pros and cons. The goal is to come with the ideal, future business model of ExplainiT.

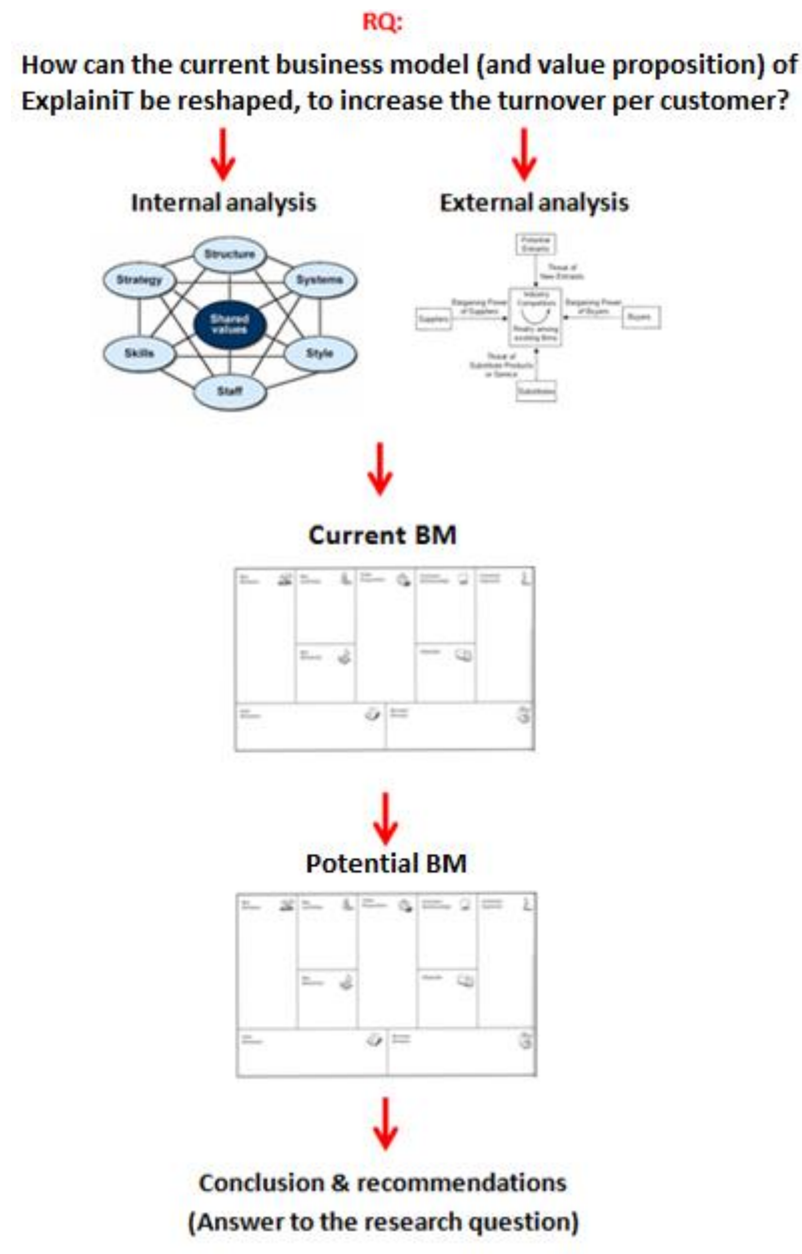


Figure 2.16: The research model

2.8 Conclusion

This theoretical framework will help us to stay focused and narrows down the research. As told above, we will look at the current business model and (with the help of an internal and external analysis) "reshape" this into an ideal business model. In this situation, this means that offering training courses will remain the core business of ExplainiT. If the new business model (increasing the value proposition) means a big change in structure and/or culture for the organization, then most certainly ExplainiT will not implement the new businesses. They are doing well with their current business, so deviating from that successful strategy can be risky. That is why we do not talk about "changing the business model".

This framework shows all the theories, tools and models which will be used to get an answer to our research question. The approach of Osterwalder en Pigneur (2010) is the central one: their Business Model Canvas will be the start and end of our report.

3. Method

This research is about the business model of ExplainiT. More specifically, it is about reshaping the business model of ExplainiT. In order to try and get an answer to the research question, multiple ways should be found to get the necessary information. First of all, the theoretical framework (chapter 2) gives scientific information about important subjects and concepts. Because these theoretic articles and books will not give us a lot of practical information, there will also be a field research. In that case, the researcher needs to get the information by means of interviews, questionnaires, etcetera. The combination of desk research and field research should be sufficient to get enough theoretical and practical information about the subject.

3.1 Research design

3.1.1 Purpose of the research

The purpose of the research is exploration. This means that "the social research is conducted to explore a topic, to start familiarize a researcher with that topic." (Babbie, 2007)
We are trying to expose the possibilities concerning the educations and organizational development. These subjects are relatively new for us and we want to familiarize ourselves with the topics.

3.1.2 Units of analysis

"Units of analysis are those things we examine in order to create summary descriptions of all such units and to explain differences among them." In this case, the units of analysis are "social artefacts", or in other words: "any product of social beings or their behaviour." (Babbie, 2007)
The main units of analysis in this research are the educations of the secretary professions and the salesman and organizational development. The goal of this research is to make the total education picture (about whether it is feasible to offer education, and how to implement it) clear for ExplainiT, from A to Z. Besides that, we will look at the organizational development program.

3.1.3 Time dimension

Babbie (2008) distinguishes two options available to deal with the issue of time in the design of a research: cross-sectional studies and longitudinal studies. "A cross-sectional study is a study based on observations representing a single point in time. A longitudinal study is a study involving the collection of data at different points of time." Because we observe a phenomenon at one point in time, our study is cross-sectional.

3.1.4 Conceptualization

This study examines the contribution of education and organizational development to a reshaped business model of ExplainiT. We would like to see if that can increase the value proposition of the company. However, two concepts should not be mixed up: training (courses) and education. With *training courses* we mean the current training courses ExplainiT offers (Appendix A). Normally these take about 1 to 3 days. With *education* we mean real education programs, like the ones offered by schools like the ROC's. These education programs consist out of multiple subjects/lessons or training courses, and normally take about 1 to 4 years. We also call these educations "studies" or "crebo's" (because every education has its own "crebonumber").
A business model consists of the elements that, taken together, create and deliver value for customers. "A "business model" articulates the logic and provides data and other evidence that demonstrates how a business creates and delivers value to customers. It also outlines the architecture of revenues, costs and profits associated with the business enterprise delivering that value." (Teece, 2010)
With "reshaping the business model" and not "changing the business model", we mean that ExplainiT will stick as close as possible to their current business model (offering training courses). The

plan is to cover the educations they might offer in the future as much as possible with the current training courses. Offering training courses will always be the core business of ExplainiT. Also the different categories of organizational development, will consist out of multiple training courses.
In this research, it is important to analyse the elements of the BMC and finding out which ones should be reshaped for ExplainiT. The question is how to analyse these different elements of the business model. We will look at them separately and make use of other ways, besides scientific literature, to get the necessary information (table 3.1).

Business model element	What to analyse?	How to analyse the current business model?	How to analyse the potential future business model?
Value propositions	• The current and future services. • How they add value. • The important elements of the VP's for competitive advantage.	• Questioning management. • Questioning account managers. • Website of ExplainiT. • Own observations. • Evaluation forms.	• Questioning management. • Interviews with external parties (e.g. DUO, ECABO, MBO2010). • Qualification files. • Websites of competitors.
Key partners Key activities Key resources	• Current and future partnerships, key activities and resources. • The reason for partnerships. • Key activities of employees. • Change in key resources	• Questioning management. • Questioning account managers. • Website of ExplainiT. • Own observations.	• Questioning management. • Questioning account managers. • Interviews with external parties. • Qualification files. • Websites of competitors.
Cost structure	• The most important costs. • Costs vs. quality.	• Questioning administration section.	• Interviews with external parties. • Websites of competitors.
Customer relationships Customer segments Channels	• Current and future relationships, customer segments and channels. • Acquisition and retention of (new) customers. • How to reach customers? • Focus on market or segments?	• Questioning management. • Questioning account managers. • Evaluation forms. • Website of ExplainiT.	• Interviews with external parties. • Websites of competitors.
Revenue streams	• Where customers do pay for. • Will they pay more when we add the new VP's?	• Questioning administration section. • Website of ExplainiT.	• Interviews with external parties. • Websites of competitors.

Table 3.1: How to analyse the current – and potential future business model elements

We can split the model into three parts: the internal analysis (key partners, key activities, key resources and cost structure), the external analysis (customer relationships, customer segments, channels and revenue streams) and the value propositions. The internal part will be analysed mainly by questioning management and the account managers of ExplainiT. Employees can tell me who the key partners are, what the key activities are of the account managers and which resources are the most important. The administration section can tell me about the costs involved in the training process.
The external part and the value propositions will be analysed also by questioning management and by means of interviews with external parties. Employees of ExplainiT can tell me how important customer relationships are, who the important customers are, which segments ExplainiT aims for and how they reach those customers. The administration section can tell me about the revenues involved in the training process.

For the potential future Business Model Canvas, we need information of external parties. We need to know if it is better to start some partnerships, how the key activities are going to change, what costs are involved, which segments ExplainiT should aim for, how to reach the customers, what revenues can we think of, etcetera. To find that information, we need to contact organizations like DUO, MBO2010, the knowledge centre ECABO and other people/organizations that can tell us more about the total process of offering education. Most likely, there are documents with rules and guidelines which ExplainiT can and should follow. We need to get a hand on those documents.
In that way, we will try to find enough data and information to fill in the Business Model Canvas twice (the current and ideal situation). In that way, we can find the differences between the two figures and think of ways to come as close as possible to the ideal situation. The interviews can also be used as validation.
(Customer) value proposition is the total sum of benefits which a customer gets from the vendor, in return for the payment. If ExplainiT can successfully implement the educations and organizational development, then the offered benefits can increase. In that case, the customer value proposition rises and the payments ExplainiT receives for their service (turnover per customer) can increase.
The current value proposition of ExplainiT will be analysed with interviews with personnel. With the results, it should be clear what the strong and weak points of the current value proposition are. With that information, we can improve the future value proposition.

3.1.5 Research method

In this research, we use interviews to receive the necessary data and information. We will have interviews (face-to-face and on the phone) with customers, employees of ExplainiT, EVC suppliers (about EVC and WVA), ROC Twente, MBO2010, DUO and ECABO. “ECABO is the knowledge centre who aims at competence-based education. They set up the files for every education, in cooperation with the business sector, where all the ROC’s should stick to.” (Interview with ECABO)
These are semi-structured interviews. We have in mind what we want to know (a framework of what to explore) and start with some basic questions. Based on the answers of the person being interviewed, new questions can be brought up during this interview. The interviews are flexible and do not have a limited set of questions.

3.2 Desk research

A desk research means that the researcher does its investigation behind his desk, by making use of scientific articles, books, the Internet, etcetera. The researcher collects secondary data, or data collected by others.
In our case, this desk research consists, for example, out of finding suitable literature; finding usable models on the Internet; looking for general information about the training market as a whole; about competitors and customers; about education; about WVA and EVC; and about ExplainiT itself.

3.3 Field research

Field research means “the direct observation of events in progress.” (Babbie, 2007)
In other words, it is about the researcher collecting original data from the field. This is primary data, or data that cannot be collected with a desk research. Examples of a field research are face-to-face and telephone interviews, questionnaires and online surveys. In this research we make use of interviews.
These interviews with multiple stakeholders can be helpful. These can be face-to-face and on the phone. With stakeholders, we mean employees of ExplainiT, customers, suppliers, potential partners, trainers, ROC’s and ECABO. Interviews can give in-depth information about interests concerning education, education prices, the duration of education, teaching objectives, competences, necessary qualifications, etcetera.

3.4 Research structure

Figure 3.1 shows, very briefly, the current and potential future business model. Figure 3.2 shows the research structure.

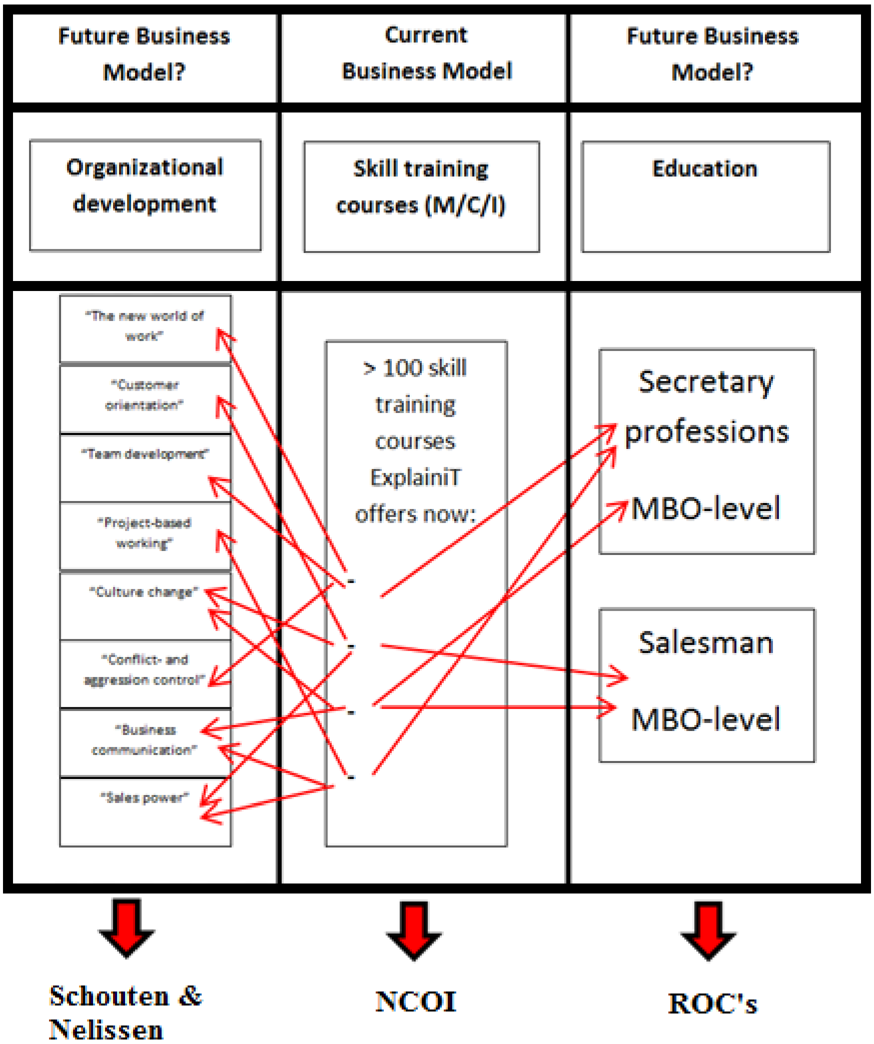


Figure 3.1: The current and potential future business model of ExplainiT

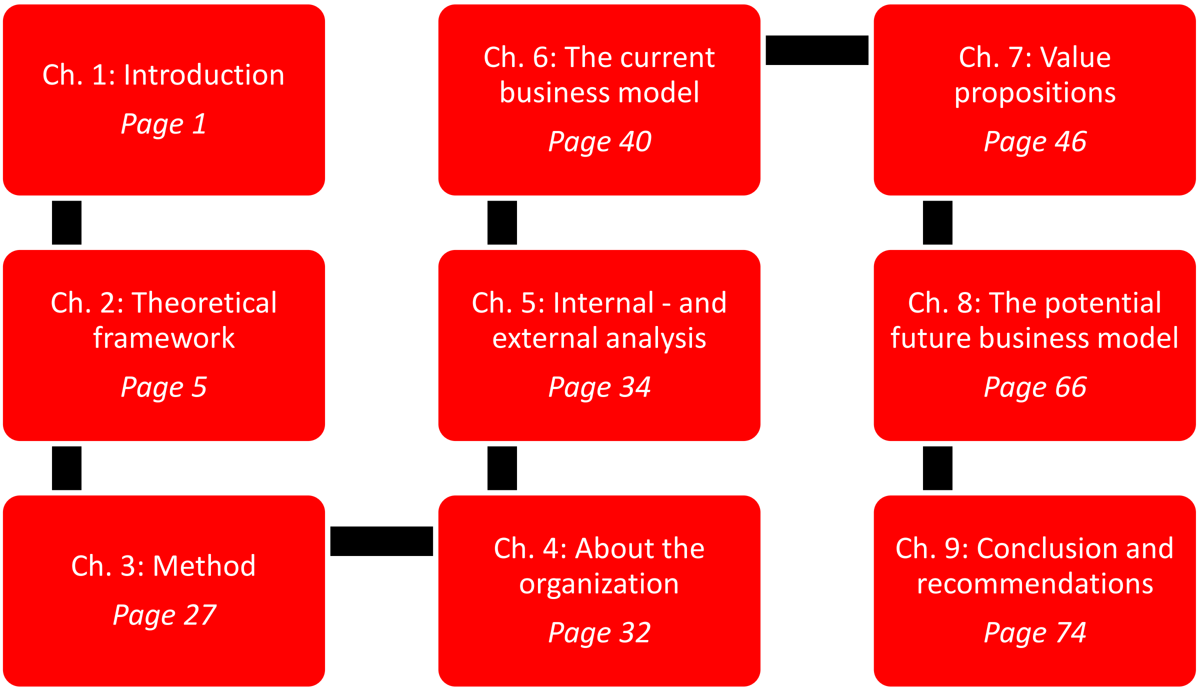


Figure 3.2: The research structure

3.5 Conclusion

The field research will consist out of semi-structured interviews with multiple stakeholders. At the start, interviews will be planned to learn more about the important subjects. When we know more, interviews can be arranged to get in touch with parties to get more in-depth information.
Summarized, this will be an exploratory research by which we investigate the possibilities to offer education (secretary professions and the salesman) and organizational development. We make use of semi-structured interviews. Together with our desk research, this should be sufficient to answer the research question.

4. About the organization

4.1 Mission

The ResourcIT group has the following mission:
“The ResourcIT group wants to adapt maximally to its customers and their desired services and solutions. Creating value for customers is always the most important. Within the business-like Microsoft spectrum we want to play a dominant role.” (Website ResourcIT)

As you can see, the customer is really important for ResourcIT. The same goes up for ExplainiT. It is their goal to create value for the customers by offering training courses. The company is very flexible in relation to this client and always adapts as much as possible to the client’s wishes.

4.2 Goal

- The primary goal of ExplainiT is continuity. To accomplish this goal, the company sets up targets at the start of each year. These targets show the account managers which turnover they must obtain for the next year. After that year, these targets will rise, depending on how long an employee works for ExplainiT.
- Another goal of ExplainiT is to get more brand awareness. To accomplish this goal, they make use of Google Adwords, mailing and continuous telephone relationships with customers.
- The final goal of ExplainiT is offering value to their clients. They want to adapt to the customer’s demands and aim for high quality services, because quality is the most important aspect of a training course.

4.3 Organization chart

Figure 4.1 shows the organization chart of ExplainiT. The sales managers are guiding the account managers.

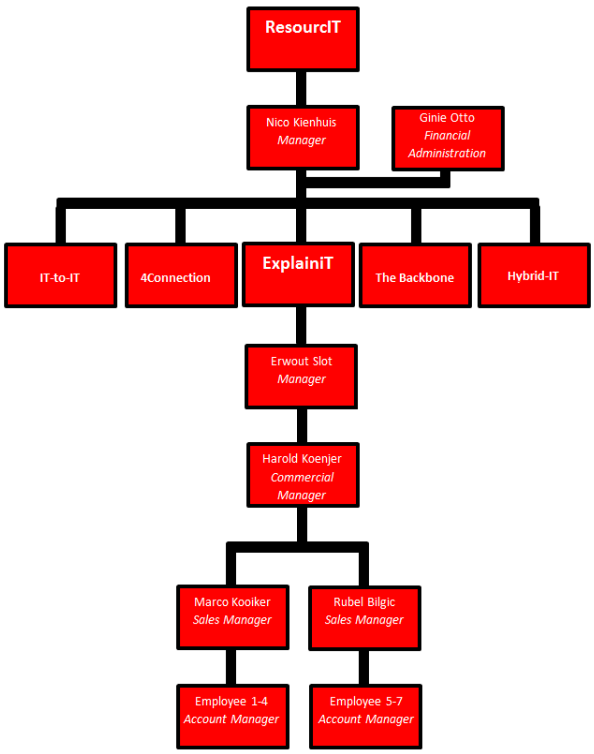


Figure 4.1: Hierarchy within ExplainiT, though the atmosphere between colleagues is informal

4.4 Organization structure

The structure of ExplainiT is flat. There are short communication lines, which make communication with employees easy. Besides that, you can react to certain situations more quickly. At ExplainiT, there is an open office: you can easily walk to colleagues, which also improves the communication. The secretary takes care of the administration of the whole ResourcIT group. They are responsible for the invoices, the wage administration, the tax returns and the debtor- and creditor accounts. After a training course is planned, they will be put on the planning board at the wall. This boards shows us the training date, the trainer, the location of the training course, the number of course members and the company where they work. Personal planning will be recorded in Microsoft Outlook.

4.5 Training courses

ExplainiT offers over 100 training courses, that can be divided into 3 categories: *management training courses* (project management, personal management, general management, sales & HRM), *communication training courses* (verbal communication, written communication, languages & social media) and *ICT training courses* (Microsoft Office, Microsoft SharePoint, OpenOffice & Adobe).
Appendix A shows the total list of training courses in 2011.

4.6 Training locations

The head office of ExplainiT is located in Hengelo. In total, ExplainiT has 12 training locations through The Netherlands (figure 4.2). Of course, training courses can also be held at the location of the client ("in-company").

Figure 4.2: Training locations of ExplainiT (Website ExplainiT)

4.7 Mobile training room

When a customer does not have the necessary materials to train in-company, ExplainiT has developed the mobile training room. This classroom consists out of 10 computers, which can (when necessary) be placed in a local network. These computers will be installed in a room of the client and, when the training courses are finished, the materials will be taken back.

5. Internal - and external analysis

This chapter will contain an analysis of ExplainiT itself and of its environment.

5.1 Internal analysis

In the so-called internal analysis, we talk about the capabilities and assets of ExplainiT and about those resources that help the organization to secure competitive advantage. The central concept of this analysis is the resource-based view. The central model is the 7-S framework of McKinsey.

5.1.1 The resource-based view

This theory states that the success of a company is largely driven from resources which have certain special characteristics. Firm's capabilities that are unique, are important for achieving sustained competitive advantage.
We link this resource-based view to a commonly known and used model: the 7-S framework of McKinsey. This is an instrument to describe how ExplainiT operates. The important assets or capabilities of the organization are integrated within this model.

5.1.2 7-S framework

The 7-S framework of McKinsey (figure 2.14) describes the seven factors to organize a company in an effective way. Together, these factors determine how an organization operates. You should take all seven factors into account, because they are interdependent: when you do not pay enough attention to one factor, it can influence others as well. The seven factors are: strategy, structure, systems, style, staff, skills and shared values. The assets and capabilities used at ExplainiT, are all integrated within these seven factors.

Strategy

Strategy is about allocating your resources in such a way, that you reach your company goals. ExplainiT chases a differentiation strategy, with some unique aspects. They try to distinguish themselves from rivals, but do not focus on a niche market. Customization and a personal touch should give ExplainiT a small lead towards competitors, when it comes to selling training courses to customers. This are examples of intangible skills. ExplainiT choses to develop and implement this market strategy. ExplainiT is an innovative company who always follows the newest trends, like offering social media training courses.
With this differentiation strategy, ExplainiT wants to make profit. The main goal is reaching the targets they set up at the start of each year. All their operations are based on reaching these targets. There is a total turnover target for all the employees of the company together and an individual turnover target (which will increase each year). Account managers are calling (potential) customers on a daily basis, to see if they are interested in certain training courses. But for selling these training courses, ExplainiT has to offer sufficient value to clients. Therefore the organization adapts maximally to these customers and their demands (for example, ExplainiT is flexible with the price and training locations). Again, this is an intangible skill. In that way, they want to increase the quality of the offered service. Evaluation of each training course and the trainers should also lead to an increase of the quality of the service. The training locations, materials and trainers (all responsible for the quality of the training course) are examples of tangible assets.

Structure

Structure is about how the units of the organization are related to each other. As told before, ExplainiT has a flat structure. Communication lines are short, which increases flexibility and decreases time to deliberate certain things or problems. ExplainiT has chosen to communicate like this, it belongs to their strategy (intangible skill). In Hengelo is an open office with no doors, so you can walk easily to colleagues when you need them. There is an informal atmosphere at the office, with little hierarchy.

Systems

With systems we mean the routines and processes how the work should be done. So it consists out of the daily activities to reach company goals. For ExplainiT, this means getting and staying in touch with (potential) customers. Account managers and sales managers achieve this through phone calls and personal meetings with the customer.
The exchange of information happens through meetings with the staff (for example the sales meeting every Monday) and verbal communication at the workplace. Next to this, there is communication by email. For that, ExplainiT uses Microsoft Outlook 2010. With this software, employees can also check agendas of colleagues. For the administration of relationships, ExplainiT uses the program Archie XRM. Most likely, this program will be replaced with Microsoft CRM in the direct future.

Style

Style is about the culture of the company. How do employees behave to achieve the company goals.
In a short time, ResourcIT has grown to five individual companies. ResourcIT and its management are pretty innovative and always looking for new opportunities. Not too long ago, in February 2011, this resulted into a fifth Private Limited Company (PLC), namely Hybrid-IT.
As told before, ExplainiT has a flat organization structure with short communication lines. The atmosphere at the office and with customers and trainers is informal, but every account manager is well informed about the targets they need to reach. Customization is the best way to describe the style of ExplainiT. The organization always adapts to the client's wishes as much as possible. An example are the custom-made training courses they offer (intangible asset). The personal aspect of the service should persuade customers to come to ExplainiT and to maintain a long-term relationship.

Staff

Staff means the number and types of personnel in the organization. ExplainiT consist out of 1 manager, 1 commercial manager, 2 sales managers, 7 account managers, 1 trainer and 1 employee for the financial administration. The rest of the staff (trainers) are working on a freelance basis.
The most important task of the personnel is account management: the acquisition and retention of customers. These relationships with customers go deep and are very intimate.

Skills

The skills are the capabilities of the organization as a whole and of the individual employees. The individual skills of the employees are needed to sell training courses to clients. The account managers have attended 2 training courses: "personal sales and acquisition" (Appendix A, number 40) and "sales and acquisition by phone" (Appendix A, number 41). The only goal of these training courses is to increase the skills of employees. Then they will be able to sell more training courses to customers and with it, increasing the individual turnover. Another important individual (intangible) skill is customer friendliness. Account managers learn the most skills over time, simply by getting more experience in account management.
The most important organizational capability, or skill, is the fact that ExplainiT offers
communication -, management - and ICT training courses. Because of that, they are able to offer training courses to almost all parts of the organization and in a lot of branches. Besides that, ExplainiT is very flexible when it comes to training locations.

Shared values

The centre of McKinsey's model. It is about the central believes: what does the organization stand for. The mission tells us that the ResourcIT group "wants to adapt maximally to its customers and their desired services and solutions. Creating value for customers is the most important." ExplainiT is specialized in training and consultancy of management, communication and ICT skills. They are working on individual development of their clients' employees. It is a service company with a practical approach. They will not interfere with their clients' line of action. On the other hand, they can be a pragmatic partner, teaching clients, their employees and teams the necessary skills to be able to realize the business targets. ExplainiT stands for quality of their training courses.

It is clear that the customer is very important for ExplainiT. Without customers, no company can exist, but for ExplainiT the Dutch statement "the customer is king" is really suitable. They adapt maximally to these customers. ExplainiT offers different forms of training courses (in-company or at a location of ExplainiT). Besides that, customers can train in groups (with colleagues or through open entry) or individual. At last, ExplainiT gives organizations the possibility to charge VAT-free.

If ExplainiT succeeds in offering organizational development and education, then the offered value will rise even more, along with the adaptation to customers (because they offer more services).

5.2 External analysis

The external analysis is an analysis of the environment of the company. It treats all elements outside the organization. Often, the researcher should do some field research to be able to fill in this external environment. Interviews, questionnaires or surveys are commonly used tools at this field research. There is also a helpful model to fill in the external environment of a company: Porter's five forces framework (figure 2.15).

5.2.1 The five forces framework

The five forces framework looks at *the competitive rivalry, the threat of entry, the power of buyers, the power of suppliers* and *the threat of substitutes.* Organizations use the framework to analyse the attractiveness of the market.

Competitive rivalry

There are a lot of suppliers of training courses in the Dutch market. This is a threat for new entrants, but it can also be a problem for ExplainiT. Competitors do offer the same training courses as ExplainiT and therefore it can be hard to attract customers. Especially for management – and communication training courses are a lot of suppliers. In West Holland, where ExplainiT is less active, it is extra hard to win from the competition. Table 5.1 shows the bigger competitors in the market.

Educational institutions	Management & Communication training courses	ICT training courses
NCOI	Schouten & Nelissen	Compu'Train
ROC	Boertiengroep	Idée ICT Opleidingsgroep
ISBW	Bestuursacademie Nederland	New Horizons
Scheidegger	ICM	Broekhuis Training Groep BV
Schouten & Nelissen	IMK Opleidingen	Master it
	Kenneth Smit Training	Learnit Training
	De Baak Opleidingen	NCOI
	Learnit Training	
	NCOI	

Table 5.1: (Potential) competitors of ExplainiT

Without a doubt, Schouten & Nelissen, NCOI and Compu'Train are the biggest competitors per segment. Customer analyses performed by ExplainiT made that clear. But what exactly do they offer?

NCOI
The primary focus of NCOI lies on offering more than 850 educations (in Master, HBO and MBO). Almost every education you can think of will be offered by NCOI. Besides that, they offer skill training courses (mainly in management and communication) and organizational development packages. Their strength and strategy is presenting all kinds of learning services and always very widespread. (Website NCOI)

Schouten & Nelissen
Schouten & Nelissen are professionals in offering management – and communication training courses. They also focus on e-training and organizational development. Besides that, they offer master educations. They make use of consultancy for training courses and educations. They are market leader in offering management- and communication training courses and are settled in multiple places in the world. Their strategy is offering consultancy, which should lead to selling training courses and educations. And not just in The Netherlands. (Website Schouten & Nelissen)

Compu'Train
Compu'Train is the leader when it comes to offering ICT training courses. They only focus on computer courses and offer over 500 of those at 10 different locations. Their strategy is aiming for ICT training courses only and improving the quality as much as possible. Compu'Train also offers the certification and exams. (Website Compu'Train)

As said before, a big strength of ExplainiT is that they offer management -, communication - and ICT training courses. The only big competitors who do the same are NCOI and Learnit Training (and of course the education offices). Perhaps in the future, ExplainiT will also offer forms of education. It is important that this does not negatively impact the quality of the training courses. That is the risk when you offer too many services.

The threat of entry
It is not very hard for new entrants to enter the training market, because the capital requirements are not that high. It doesn't cost a lot to start a new training company and you don't need a lot of space for your office. You could start a small company, and expand it later (when you are more settled in the market). However, a problem for these new entrants can be that there are some big suppliers of training courses (e.g. Schouten & Nelissen, NCOI, Compu'Train). It will be difficult to compete against such companies. Smaller companies always try to find ways to win from the bigger organizations. There are, for example, parties in the market that offer fully specialized custom-made studies. An example of such a supplier is Vak & Werk School. (Website Vak & Werk School)
For ExplainiT, the threat of new entrants is not very high. In east Holland, ExplainiT is market leader in ICT training courses. Besides that, ExplainiT has built up a good reputation in The Netherlands and, together with their experience and references, they have a big advantage over new entrants.

The power of buyers
The buyer of training courses has the power of choosing the supplier. There are a lot of training suppliers in the market and a lot of companies who want to train their employees. Almost every organization does train their people. And the power of these buyers is that they can choose which training course they want to attend and which supplier will take care of this training course. Experiences from the past, however, learn us that customers often stick to the same supplier of training courses (when this supplier meets their needs). ExplainiT has a large customer file and because of the daily operations of account managers, the company makes sure that customers will

not forget about ExplainiT. Most customers are satisfied with the training courses of ExplainiT (we know that based on the evaluation forms customers fill in after each course) and do really come back when another training course is needed.
We can conclude that the power of buyers is average. The advantage and strength of ExplainiT is the fact that they can offer training courses to almost all parts of the organization (management, communication and ICT). The account managers and trainers are responsible for the quality of the service. This quality is, of course, decisive for the customer to come back or not.

The power of suppliers

The power of suppliers of ExplainiT is not very high. ExplainiT does not have a lot of suppliers. The only suppliers they have are the companies who take care of the freelance trainers (or sometimes these trainers are independent) and the companies who offer the needed (training) materials.
Trainers offer their knowledge to ExplainiT and its customers. There are a lot of freelance trainers, which means that their power reduces. However, every freelancer has its own specialism and good, experienced trainers are hard to find. This means that the power of trainers can be high (e.g. when they are specialised in a difficult and uncommon training course, like Microsoft SharePoint or Microsoft Project) and in some cases low (e.g. when they are specialised in a common training course, like Microsoft Word basic or Microsoft Excel basic). ExplainiT often searches for skilled trainers who can take care of a high quality training course. Suppliers of training and office materials do not have a lot of power. These materials can be ordered at many places and from many suppliers. ExplainiT does stick to the same suppliers, when the experiences from the past are good. In that case, the power of the supplier can rise a bit, but ExplainiT can always switch to another supplier when they want to.

The threat of substitutes

This goes up for ExplainiT when a company's need for training courses changes (substitution of need). But in most cases, when a customer wants to attend a different training course, ExplainiT can offer this new training course because of their large supply. Another threat can be that a company does not want to train anymore (doing without), for example because of cost savings. But as said before, most organizations do train their employees. When they do not want to train today, they will do it often in the future anyway.
The trend towards e-learning can also be a threat for ExplainiT. ExplainiT does not (yet) offer training courses online, which can mean a loss of customers. But it is almost impossible to make these e-learning training courses as detailed and specific as face-to-face training courses. Because questions are difficult to answer online and for course members it is hard to attend a training course behind your computer at home or at work, with no trainer present who can help you. That is the reason why still most companies choose for the old fashioned way of training.

5.2.2 Market attractiveness

Summarized, we can say that the market is still pretty attractive for ExplainiT. The threat of new entrants is moderate, while the threat of substitutes is not very high. The power of buyers is average to fairly high, but the power of suppliers is not. The large competition can negatively influence the sales of ExplainiT, but the company is, after about ten years, pretty much settled in the market for management -, communication - and ICT training courses, and they have a large customer file. The overall conclusion is that ExplainiT will survive in this market for the coming years, especially when they keep growing like they did last years. ExplainiT successfully offers a value proposition in multiple customer segments. With the idea of offering organizational development packages and educations, they would like to increase the value proposition even more, what should lead to more revenues. As said, they grew a lot last years, but to become a really big player in the market, they perhaps should focus on multiple services and not just training courses.

5.3 Conclusion

From the analysis of the organization and the environment, it results that ExplainiT follows a differentiation strategy whereby customization and the personal touch are important aspects. The company has a flat organization structure and an informal culture. The staff mainly consists of account managers and their daily operations are customer acquisition and customer retention. ExplainiT wants to adapt maximally to these customers.

The market wherein ExplainiT is active is still attractive for the company. The threat of new entrants is average, while the threat of substitutes is not that high. The power of buyers is average and the power of suppliers is low. There is a large competition in the market and there are a lot of training course suppliers.

6. The current business model

6.1 Introduction

In this chapter we will discuss the current situation of ExplainiT. But developing a successful business model is not enough to assure competitive advantage. Firms must follow some kind of strategy. The business model is there to fill the gap between this strategy and the business processes.

6.2 The current business and its strategy, business model and processes

We will look at the business strategy of ExplainiT, at the value offered to customers in return for a payment and at the business processes. Most results will be outlined in the current Business Model Canvas.

6.2.1 The business

What business are we in? This question is about the strategic scope of the firm. "It is concerned with the boundaries that managers conceive for their organization in terms of geography, product (or service) diversity, or the way in which business is conducted." (Johnson & Scholes, 1999)
ExplainiT is in the training business. Their goal is to offer solutions to the problems of their customers, to fulfil the client's need: achieving knowledge. ExplainiT is active in every corner of The Netherlands. They offer specific management -, communication - and ICT training courses (Appendix A) to organizations (usually with more than 100 employees). These organizations come from very diverse branches, from healthcare organizations to District Courts, from local authorities to water regulatory authorities. The customer has the possibility to train in-company or at one of the 12 training locations of ExplainiT. Besides that, the client can train individually, in groups (with colleagues) or through open entry (with course members of multiple organizations).

6.2.2 The business strategy

ExplainiT chases a differentiation strategy. The organization aims for the whole training industry, but always tries to distinguish themselves from competitors. They do this by focusing on customization and "personal touch". Every customer of ExplainiT is connected to one account manager. This account manager is their contact point at all times. The account managers plans the whole process by themself: they plan the training course, they arrange the freelance trainer, the training room, the course members, the evaluation forms, the certificates, etcetera. There are very short communication lines at ExplainiT and the customers like that. The customer relationships are the most important resource of ExplainiT. That is why they have adapted their business strategy to it.
Besides the customization, ExplainiT tries to beat its competitors in more ways:

- A training supplier who offers communication -, management - and ICT training courses is quite unique. That's why ExplainiT can reach so many branches.
- Because customers are very important for ExplainiT, their attitude towards them is as flexible as possible. They also offer custom-made training courses, completely adjusted to the client's wishes.
- For organizations that cannot reclaim value added tax, ExplainiT gives the opportunity to charge VAT-free.
- ExplainiT is an innovative company, who always follows the latest trends regarding training courses. An example are the new social media training courses.
- The travel time and costs are relatively low, because ExplainiT has 12 training locations in all regions of The Netherlands. Besides that, the customer can choose to train in-company at their own organization.

Shortly, ExplainiT has developed its own differentiation strategy, with a few unique aspects. So far, this strategy has been quite successful and the company has grown a lot last years.

6.2.3 The business model

The definition of a business model is, according to Osterwalder & Pigneur (2010): “A business model describes the rationale of how an organization creates, delivers, and captures value.” According to the authors, consists a business model of 9 elements: customer segments, value propositions, channels, customer relationships, revenue streams, key resources, key activities, key partners and cost structure.

Customer segments

ExplainiT focuses on the whole market of training courses, on one large group of customers with broadly similar needs. Here you can think of the need to train to become more flexible, to learn to work with certain computer programs, or to overcome your fears about business presentations. There is no distinction between different customer segments or branches. In the first place, they focus on organizations with more than 100 employees. When we look at the total education/training market, ExplainiT aims only for the training course segment.

Value propositions

The service ExplainiT offers are management -, communication - and ICT skill training courses. The customer has a need to train, or to develop his or her skills (e.g. learning about the new social media, to become a professional executive or learning to deal with stress and work pressure) and ExplainiT offers a way to satisfy that need. The value proposition of ExplainiT is unique in ways like customization and the “personal touch”. The account manager takes care of the total training course process. This keeps communication lines short and makes sure that support is offered quickly. The training courses are all about customer experience; ExplainiT offers qualitative value. They do not compete based on price or speed.

Channels

To deliver a value proposition to the customer, channels are used. Channels are customer touch points and therefore are important for ExplainiT. Figure 2.4 showed us the channel phases: awareness, evaluation, purchase, delivery and after sales.
The first task of ExplainiT is creating awareness that the organization offers training courses. This is done with advertising and phone calls from the account managers to customers. Usually this customer then gets the “trainingsbrochure” with information about all training courses, about training locations, VAT-free charging, prices, etcetera. In this brochure, the customer can evaluate how ExplainiT offers value. After some time, the account manager contacts the same company again with the question whether they want to attend certain training courses. If so, then the account manager makes a training proposal with the training price and location. If both parties agree on that, the purchase will be made and the account manager can arrange a training date, a trainer, training materials, etcetera. The actual training course is the delivery of the service. When this training course is completed, ExplainiT takes care of after sales support, by keeping in touch with the customer. During and after the training courses, the account managers evaluates the training course on the phone with their customer. They also keep asking if this client is planning to attend more training courses in the future. After the training course, the customer also needs to fill in a written evaluation form and they receive a certificate.
Almost all the five phases are direct and owned channels and are responsibilities of the account managers. Except for the delivery of the service: therefore external (freelance) trainers are hired. This is an indirect partner channel. The phone network is an important part of the channels. How ExplainiT deals with customers also belongs to the next paragraph.

Customer relationships

In case of ExplainiT, every customer is connected to a single account manager. This is an intimate, personal and deep relationship which is developed over a longer period of time. Osterwalder &

Pigneur (2010) call this "dedicated personal assistance". This relationship is driven by two motivations: customer acquisition and customer retention. During the whole channel phase, this relationship is very important. From the first phone call, until filling in the evaluation form after the training course, the account manager must monitor and maintain this intimate relationship.

Revenue streams

The customer pays for the offered skill training course. These customers receive the invoice at the time the training course starts and they have to settle this within 14 days. For ExplainiT, this are "transaction revenues" (a one-time payment afterwards) and sometimes "recurring revenues" (e.g. when the customer attends a package of training courses). These revenue streams are generated by "usage fees", because it is a particular service and the more you will use it, the more you will pay. The pricing mechanism is fixed.

Key resources

There are multiple important assets for ExplainiT. The physical assets are the training locations, computers, phones, desks, training material (books, brochures, readers), etcetera. The service ExplainiT offers is not physical. Human assets are of upmost importance for the organization. The sales force (account managers) needs to maintain strong, reliable and long-term relationships with customers. Customization and the "personal touch" of the relationships with customers have created an image of ExplainiT. Such a (positive) image or brand is significant to be successful in the market.
Besides the account managers, the hired trainers are important human assets, because they possess the required knowledge to offer a solution to the customer's problem. The financial assets are the accounts receivable, or in other words the payments ExplainiT receives for their service. At last, ExplainiT has some intellectual assets. They have a partnership agreement with an organization who arranges ICT trainers. Besides that, they have a customer database called "Archie". The plan is to switch to another customer database, namely Microsoft CRM.

Key activities

Key activities are needed to create and offer a value proposition, to maintain customer relationships, to reach markets and to earn revenues. In case of ExplainiT, the key activities are there to satisfy a need (the need of knowledge) or in other words, to solve a problem (the problem of too little knowledge). The skill training courses are there to expand knowledge on certain subjects (Appendix A). The key activities of the account managers are customer acquisition and customer retention.
Shortly, the operations of service organizations like ExplainiT, are dominated by problem solving activities. Osterwalder & Pigneur (2010): "Their business model calls for activities such as knowledge management and continuous training."

Key partners

"This building block describes the network of suppliers and partners that make the business model work. Organizations create partnerships to optimize their business model, reduce risk, or acquire resources." (Osterwalder & Pigneur, 2010)
ExplainiT has a strategic alliance with an organization who arranges the ICT trainers. Besides that, they have an agreement or collaboration with many freelance trainers (for management -, communication - and ICT training courses). These are *strategic alliances between non-competitors.*
Besides that, ExplainiT has some *buyer-supplier relationships to assure reliable supplies.* Examples are the companies who provide training materials like books, scribbling-pads, printed sheets, writing-materials, etcetera.
ExplainiT likes to own as many resources as possible and to perform many activities of the business model by itself. It wants to be independent. However, sometimes partnerships are simply needed, because it is not reasonable nor advantageous to perform every activity by yourself. The reason for ExplainiT to start these partnerships is for *the acquisition of particular resources and activities*. They

must rely on other organizations to furnish particular resources. These partnerships are motivated by the need to obtain knowledge (that of the trainer). It is also for reducing costs, because it is illogical for ExplainiT to recruit all the needed trainers: there are about 100 of them.

Cost structure

The cost structure of ExplainiT is value-driven. They focus on the creation of value, more than on reducing the costs. There is a high degree of personalized service, which is also a feature of value-driven cost structures. The manager of the ResourcIT Group confirms this: "The past has learned us that differentiation based on low prices is hard, especially with such an homogenous product. And in this sector it often means the end of those companies. It is all about wrapping the total package, and how you offer this to your customers."

The most important costs for ExplainiT are:

- *Hiring (freelance) trainer:* these trainers are often very specialized in certain areas and therefore ask a high remuneration in exchange for their service. This is an example of variable costs: the more or the longer you use a trainer, the more it will cost.
- *Personnel expenses:* the staffing costs of ExplainiT. This is an example of variable costs: the more an employee works, the more it gets paid.
- *General costs:* examples are hire and rental charges (fixed costs); costs for gas, water and electricity (fixed costs); and costs for the lunches of course members (variable costs: the more course members, the higher the price).

The price of a training course often depends on the costs involved. First ExplainiT has to pay for the trainer and the training materials. Besides that, they pay the lunch of course members which attend a training in Arnhem or Hengelo. At last, also a small percentage of the total fixed costs will be recharged in the price of the training course. ExplainiT always attempts to be and stay profitable by reducing costs as much as possible. The organization can profit from economies of scale: sometimes they can enjoy cost advantages for ordering large amounts of training materials. Occasionally, ExplainiT can also arrange low fixed prices for certain freelance trainers who agreed on doing a larger project. However, this may not impair the quality of a training course, because the creation of value is the most important for ExplainiT. All the plans for the future, described in this report, are a nice example of value creation.

6.2.4 The business processes

The business model (how do all pieces fit together) connects the business strategy (how an organization hopes to do better than rivals) with the business processes (the daily activities to reach the end goal). Important processes for ExplainiT are the customer acquisition and retention. If you do well, you can bind customers to your organization. Besides that, it is important to arrange specialised trainers to keep the quality of training courses (and the value proposition) high.
As told before, the process of value creation can be divided into three steps:

Product/Service creation → Order delivery → Service assurance

The total business process of selling a training course as an account manager of ExplainiT is like figure 6.1. The first four steps are about service creation, step 5 is the order delivery and step 6 is the service assurance.

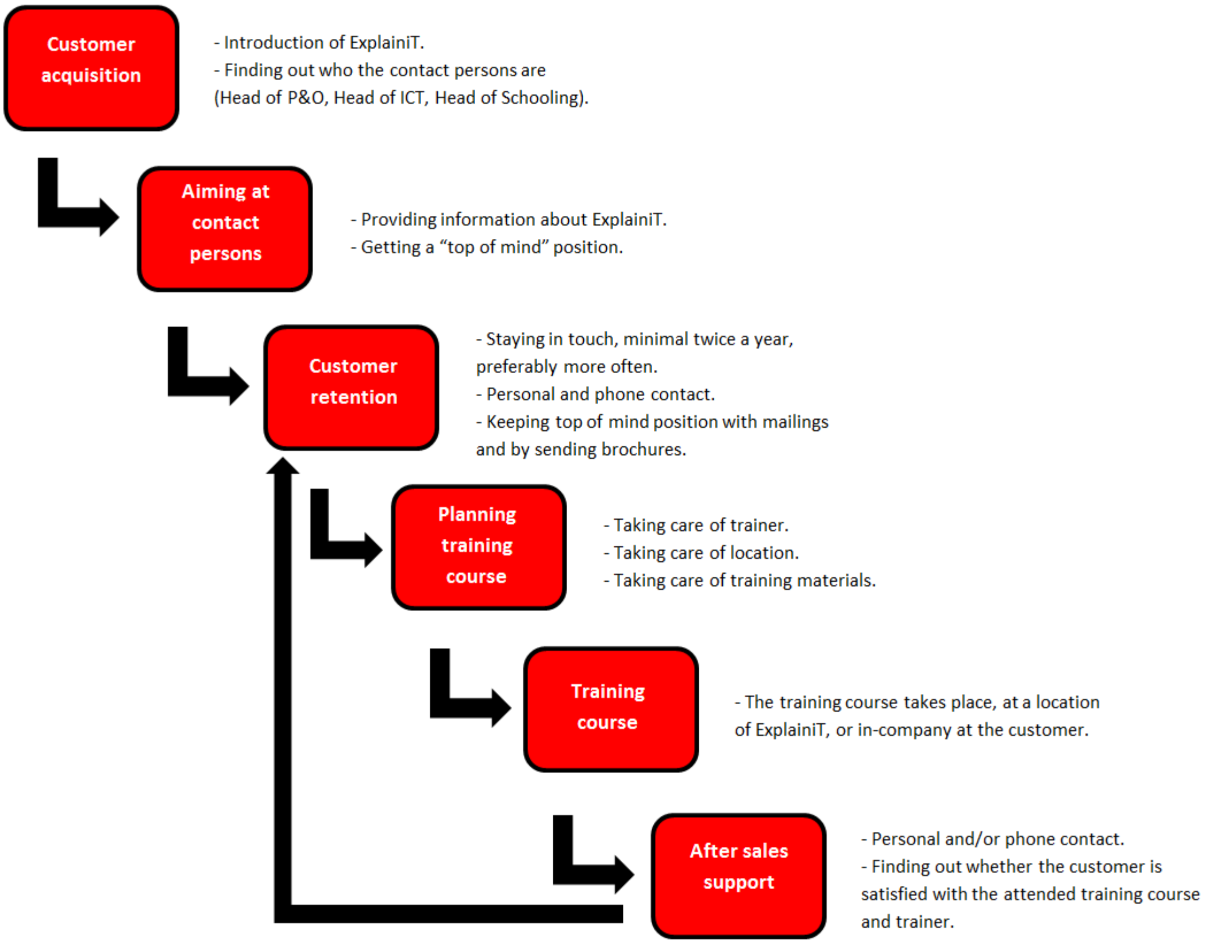


Figure 6.1: The business process of ExplainiT

The process starts with the **acquisition of customers**. Account managers call organizations and give an introduction about what ExplainiT does. They also try to find out which persons within those organizations are responsible for training employees.
When those **contact persons** are known, all phone calls (and personal meetings) will be aimed at them. They will be introduced about ExplainiT. The goal is to get a so called "top of mind" position: that when the (potential) customer wants to attend a training course, they directly think about ExplainiT.
The next step is **customer retention**. It is important to keep in touch with the potential customers just enough. Account managers should not contact those organizations too little, but also not too much (because that will annoy them). This customer retention mainly consists out of phone calls, but it is also wise to show your face now and then. During those personal meetings, an account manager can try to convince the potential customer to attend a training course of ExplainiT. Also sending a mailing and a training brochure, will make sure that they will not forget about ExplainiT.
When those potential customers want to attend a training, the account manager will make a training proposal. When both parties agree on the price, duration and location, **the planning of the training course** can start. This means that the account manager must arrange a trainer, training materials and secure the location.
When everything is settled, the actual **training course** can take place. After this training course, the **after sales process** starts. This, again, means phone calls and/or personal contact. Account managers must find out whether the customer is satisfied with the attended training course and trainer.
When a training course and the corresponding after sales support has been done, the process of customer retention (and staying top of mind) starts all over again.

6.3 The current Business Model Canvas

Key Partners
- Strategic alliance with organization for ICT trainers.
- Collaboration with freelance trainers.
- Buyer-supplier relationships to assure reliable suppliers (materials).
- ExplainiT prefers to own as many resources as possible and perform every activity by itself.
- For acquisition of particular resources and activities, partnerships are needed.

Key Activities
- Customer need: more knowledge (e.g. to become more efficient).
- Skill training courses to satisfy that need.
- Account managers key activities:
  - Customer acquisition.
  - Customer retention.
  - Phone network.

Key Resources
- Physical: e.g. training locations, pc's, phones. Service is not physical.
- Human: account managers, trainers.
- Financial: acc. receivable.
- Intellectual: partnership trainers bureau, Archie.
- Customization & personal touch → strong image/brand.

Value Propositions
- Customer wants to develop skills (e.g. becoming more flexible, to get to know a computer program).
- VP: skill training courses (m, c &i).
- VP is unique when we look at:
  - Customization.
  - Personal touch.
  - Account manager manages whole training process.
  - Leads to strong, long-term customer relationships.
- Customer experience = qualitative value.
- No competition based on prices or speed.

Customer Relationships
- Each customer connected to acc. man.
- Acc. man. responsible for phone network::
  - Customer acquisition.
  - Customer retention.
- Intimate and long-term relationships.
- Customize & personal touch.

Channels
1) Reaching customers and creating awareness.
2) Customer buys service.
3) Evaluation and after-sales support.
- Almost only direct owned channels.
- Indirect partner channel: external (freelance) trainers.

Customer Segments
- Focus on whole training/education market.
- No distinction between different segments.
- Usually focus on organizations with more than 100 employees.
- Differentiation strategy.
- Examples of customers: hospitals, universities, communities, district courts, departments, building societies, police departments, the army.
- All kinds of organizations in the industry, business services, government and healthcare.

Cost Structure
- Cost structure is value-driven. High degree of personalized service.
- It is all about "wrapping the package" and how you offer this value to customers.
- Important costs:
  - Hiring trainers.
  - Personnel expenses.
  - General costs.
- Costs are recharged in the training course price.

Revenue Streams
- Customer pays for the offered value/skill training course.
- Mostly transaction revenues (one-time payment afterwards).
- Sometimes recurring revenues (e.g. a package of training courses).
- Revenue streams are generated by usage fees (particular service, the more you use it, the more you pay).
- Pricing mechanism is fixed.

Note: The business model elements are more extensively described in paragraph 6.2.3.

7. Value propositions

Customer value proposition is the reason why a customer chooses your company instead of another. Currently, the skill training courses are ExplainiT its value proposition. This research is done to see whether there are possibilities for ExplainiT to increase their value proposition and, as a result, the turnover per customer. Therefore we look at two new services: educations and organizational development.

7.1 Educations

Many privately-owned educational institutions, who offer Intermediate Vocational Education (MBO), are registered in the Crebo-register. These institutions execute educations according to the qualification files supported and validated by the Dutch Ministry of Education, Culture and Science. Such organizations offer educations which are acknowledged by the Ministry, what means that the obtained diploma is of the same value as a diploma obtained at a ROC. Besides that, the transition rules connected to Intermediate Vocational Education and towards Higher Vocational Education are the same. Educational institutions can also choose to offer educations without an acknowledgement of the Ministry. This often goes up for specialisms and parts or elements of a study. (Interview with ECABO)

ExplainiT wants to offer educations which are acknowledged by the Ministry. In that case, they can still choose from two options: *end term based education* and *competence-based education*.

End term based education

Last years, this form of education was the standard in The Netherlands. Partial qualifications are a characteristic of end term based education. Another word is “experimental education” or “MBO oude stijl”. Shortly, this is the old fashioned way of offering educations. Starting in August 2012, every education should be competence-based. (Interview with MBO2010)

Competence-based education

Obtaining competences and skills is the characteristic of competence-based education. It aims for the skills and competences someone already has. Subsequently, there will be looked how these competences can be expanded even further. Together with developing new competences, this is the new modern form of education.
This sort of education is more up to date than end term based education and is also called “MBO nieuwe stijl”. As told above, in the direct future every education is competence-based. The society is changing and companies are changing with it. Competence-based education aims for more practice situations in the study program. Students should be given the ability to acquire three elements:

- Knowledge.
- Skills.
- Professional attitude.

Knowledge and skills are elements that you will find in all areas of education. But according to the business sector however, a professional attitude was missing. Contact with colleagues or customers for example, is of great importance these days. That is the reason why education is making the switch towards competence-based education, by which the focus lies more on the actual business and industry (practice part). The student can obtain a diploma when he or she can prove to possess the competences needed. Companies who offer competence-based education, should request the studies they offer every year again. However, competence-based education is not an education concept. Educational institutions are allowed to establish and shape their educations, as long as they stick to the qualification files of ECABO. (Website Educatie en School)

Shortly, this is the form of education where ExplainiT should focus itself on. Because of the fact that end term based education will disappear permanently in 2012, ExplainiT does not have much of a choice.

Qualification file

The Dutch knowledge centre ECABO aims for competence-based education. Every year, they set up the qualification files of every (new) study/education (for economic-administrative-, ICT- and safety professions), in cooperation with the business sector. All institutions who offers MBO studies and are registered in the Crebo-register, should stick to these files. With the help of the files, educations can be made. The ROC's still have to approve and accept the studies. When that is done, the institution Colo (the union of all Dutch knowledge centres) also has to support the proposal. After which the files go to the Ministry of Education, Culture and Science. If the Ministry approves the qualification files, the process is done and can be applied to the educations.

Since 2010, the qualification files are competence based. Traditionally, people start to learn at school after which they start working. Nowadays, the focus lies more on practicing: people start working and by means of the qualification files, it should become clear what someone still has to learn. After which a learning path can be made.
A qualification file describes the core tasks of the professions (activities that are distinctive for a job); the work processes (describe aspects of personality, attitude, motivation, skills and knowledge) and the competences (these are often universal for a lot of roles and tasks).
The files are competence based, because assessments lead to a verification of those things someone still has to learn. With the qualification file, institutions can test if someone possesses the right capacities to execute a certain profession. It also shows the requirements to obtain a diploma.
Multiple educations of multiple MBO levels can fall within the scope of a qualification file. So an educational institution can hand out more than one diploma based on that qualification file. As told before, a qualification file is not an education method. Every educational institution determines on its own the way participants can achieve the competences described in the files. However, the Dutch College of Education still has to approve this study program.

The qualification files of the secretary professions (secretariële beroepen) and the salesman (commercieel medewerker) can be found on the website of ECABO (http://www.ecabo.nl). These are too big to take up in this report.

The next question is whether ExplainiT should focus itself on offering BOL or BBL education, or perhaps a combination of both.

BOL

The Dutch abbreviation BOL means "beroepsopleidende leerweg". It is an education form of the Intermediate Vocational Education where the student spends its time mostly at school. During the education, this student has to follow some short-term internship. The practice part is between 20% and 60%.

BBL

The second form of the Intermediate Vocational Education is the "beroepsbegeleidende leerweg", or BBL. This means that the student combines working and learning. The student works at an organization and follows at the same time a study. The focus lies on the practice part of the study. In many cases, it is about educations for existing employees or job-seekers who want to achieve a MBO diploma (or partial qualification) through a combination of learning and working. (Website Vak & Werk School)

Further, organizations can receive a yearly subsidy for compensating the costs of this employee/student (see also paragraph 2.2.4). In 2011, this subsidy payment is maximally € 2,738 per employee. When there is a commission of less than 36 hours a week, this payment is proportional lower. Employers receive this payment through a cut in the gross labour costs.

ExplainiT should focus on and specialize itself in offering BBL-studies for adults (adult education). This will also be the most easiest and most obvious way to offer the new studies, because the current training courses are also meant for adults/employees of organizations (considering ExplainiT wants to stick as close as possible to their current business model). Also seeing the fact that competence-based education is more practice oriented, is it likely that BBL fits better than BOL. Competitors sometimes focus on both BOL and BBL studies, but in most cases their studies are also for the BBL. Adult education means that the participant should be at least 18 years old.
Shortly, we talk about competence-based education in the BBL. But you still have to determine the qualification levels of these Intermediate Vocational Educations.

MBO levels

In Holland, the Intermediate Vocational Education is grouped in four qualification levels:

- *Level 1:* Assistant professional.
- *Level 2:* Employee/basic professional.
- *Level 3:* Independent employee.
- *Level 4:* Middle management staff member/specialized professional.

ExplainiT is aiming for a combination of educations of level 3 and 4.

7.1.1 Secretary professions

The name secretary is the collective term for all secretary professions. When we talk about specific tasks for a specific secretary, this will be mentioned. The different secretary studies in this branch are offered at level 3 and 4:

- Secretary (Secretaresse), level 3. Crebo number: 95380.
- Legal secretary (Juridisch secretaresse), level 4. Crebo number: 95392.
- Medical secretary (Medisch secretaresse), level 4. Crebo number: 95393.
- Management assistant (Directiesecretaresse/Managementassistent), level 4. Crebo number: 95391.

ExplainiT aims only for the studies Secretary (MBO level 3) and Management assistant (MBO level 4), because those two fit best their current field of expertise. MBO level 4 means a higher level of complexity of the activities, more responsibility for the execution of these activities, more independency and showing initiative in functioning, more and faster understanding of the activities, more contacts and a better notion of languages and calculating.

Core tasks

The work within this branch consists out of two core tasks:

1. ***Accomplish tasks around information management.***

The secretary takes care of physical and digital mail pieces by reading, registration, sorting, scanning/copying and distributing them. They guard the treatment of mail pieces and finish these in a certain order, starting with the most important ones. A lot of correspondence will be taken care of by e-mail. Text processing will usually be done independently. These texts are mailings, letters, presentations, proposals, surveys, reports, etcetera. The secretary elaborates the collected information into a written report, examines and checks the document with respect to content and grammatical accuracy and shapes the document according to the corporate design. The secretary should frequently find the right balance between speed and carefulness. Besides that, he or she

should frequently make the consideration what assignments are the most important and should get priority.
The secretary registers the documents and takes care of signing these documents, includes complementary information and attachments if needed, adds the document (with attachments) to the right (electronic) file and prepares everything for distribution. By taking care of the correspondence, the secretary should frequently decide which distribution channel in a certain situation is most suitable (when looking at effectiveness and costs). Subsequently the secretary takes care of the outgoing physical post and sends physical and digital mail. The secretary manages (digital) archive pieces, administers files or dossiers and maintains the electronic archive. He or she treats confidential pieces correctly and guards the completion of these documents. The secretary manages the archive by looking at accuracy, completeness, availability and accessibility of files.
Daily, the secretary answers the phone, puts these phone calls through, takes messages and takes care of questions and requests for clarification. He or she has to consider whether certain confidential information can be provided or should be restrained. The secretary sets priorities and is responsible for a good progress of the daily information streams. The secretary looks after the input of information of other departments in order that the management and board are informed sufficiently.
The secretary coordinates the stream of communication and information, both within the organization as around it. He or she has a big network and is able to provide the actual data to the supervisor by means of that network.

Specific activities

Management assistant
Besides the activities described above, the management assistant accomplishes general administrative tasks, like the registration of days off; taking care of the presence and absence administration; arranging job evaluation conversations; administrating personnel files; and providing texts and information for the annual plan and the annual report of the organization. In some cases, he or she is also responsible for maintaining the website of the organization. It is possible that the management assistant has to deal with confidential information about, for example, plans about the staff that should remain secret.
(Qualification file Secretariële beroepen)

2. Accomplish tasks around planning and organization.

The secretary manages and maintains the agenda of the board or executives. The secretary should be well informed about the activities, so that he or she can estimate whether an appointment is important or not. The secretary is able to cancel appointments without remorse, when something more important takes place.
The secretary arranges logistics of meetings by means of a room reservation system.
One of the activities for taking care of a meeting is getting information about the kind of meeting and to draft a planning, a scenario or checklist. He or she claims verbally or written, internal and/or external proposals of different meeting rooms with the desired facilities, makes selection, discusses (if necessary) with the principal about the most suitable location and makes the reservation for that room. Subsequently, the secretary invites the participants for the meeting and provides them with the necessary (meeting)pieces, before, during and after the meeting. During the gathering, the secretary makes notes, writes down issues and makes a summary. He or she takes care of running businesses and possible future meetings.
For a meeting abroad, the secretary makes reservations for the journey and hotel accommodations. The secretary sets priorities within the planning process and solves organizational problems, is flexible and immune to stress. He or she takes careful care of internal and external relations and respects the confidential character of information.

Specific activities

Management assistant
The management assistant arranges general and technical services, purchases office goods and manages the corresponding budgets. He or she keeps up stock and orders new (office) materials. The management assistant administers the expense sheets, takes care of invoices and imports them into an administration system for different products or services. The management assistant compares different proposals based on price and quality. For a good execution of the activities, the management assistant shows analytical power and notion of data.
(Qualification file Secretariële beroepen)

Where does the secretary work?

The secretary works in almost all organizations (big, small, profit, non-profit). Participants who follow an education in the branch *secretary professions* have the choice to graduate as a secretary, legal secretary, medical secretary or management assistant. It is best for ExplainiT to offer the first and last graduation possibility. (Qualification file Secretariële beroepen)

What should a secretary be able to do?

A good secretary takes a lot of stress and work out of the hands of the board and executives. The demands of a recruitment- and selection bureau for a secretary are: “showing understanding of organizations and its processes, be able to build a network and possess a high social I.Q. Having interest in what happens abroad is preferred.”
The secretary activities, like correspondence and mail processing, are still there, but other important duties are added. Especially the personal characteristics fulfil an important role: the secretary must be able to coordinate, organize and communicate and have social skills. A more experienced secretary knows how to get the right information, for example by keeping a close eye on e-mail traffic or speaking to the right persons. But the real important information should come from the board of directors. The secretary should prepare and arrange everything to the very last detail. The secretary actually has a lot of power or influence. A smart manager knows exactly how to make use of this and leaves all kinds of business to the secretary to save a lot of time.
(Qualification file Secretariële beroepen)

Career possibilities

Secretary
The secretary (MBO level 3) can (based on experience, communicative skills and organizing abilities, management educations and job changes) achieve a position with more content and responsibilities. The secretary can grow towards management assistant. A secretary with a diploma MBO level 3, can start an MBO level 4 study.

Management assistant
The management assistant can grow based on experience in the function of office manager, but can also acquire functions in public relations, marketing, personnel and organization, general and technical services, communication or grow towards entrepreneur. Because of the versatility of the function, he or she can also grow towards higher administrative functions with more responsibilities within or outside their own organization. A management assistant with a diploma MBO level 4, can start a study in the Higher Vocational Education, or HBO.

Labour market

The labour market perspective for the secretary and management assistant is between sufficient and good. There are enough jobs available for beginners in the market. The trainees don’t face a lot of trouble when looking for an internship. The number of participants in secretary professions stays at a constant level. (Qualification file Secretariële beroepen)

Work processes

Table 7.1 shows the work processes belonging to the core tasks, for both the secretary and the management assistant. A cross means that the work processes match the qualification.

Core task		Work process	Qualification: Secretary	Qualification: Management assistant
CT 1: Accomplish tasks around information management.				
	1.1	Takes care of written information exchange.	X	X
	1.2	Takes care of verbal information exchange (by phone).	X	X
	1.3	Maintains and realises the (digital) archive.	X	
	1.4	Takes care of documentation and administers files.		X
	1.5	Maintains relationships.	X	X
	1.6	Accomplishes administrative tasks.	X	X
CT 2: Accomplish tasks around planning and organization.				
	2.1	Managing the agenda.	X	X
	2.2	Arranging meeting rooms and facilities. *		
	2.3	Organizes gatherings.	X	X
	2.4	Reports and finishes businesses.	X	X
	2.5	Welcomes visitors.	X	X
	2.6	Prepares consulting –hours, welcomes patients, makes future appointments and finishes businesses. *		
	2.7	Arranges journeys and accommodations.	X	X
	2.8	Manages small budgets and finishes financial businesses.		X
	2.9	Takes care of invoices and declarations.	X	

* No cross means that the work process does not count for the secretary, nor the management assistant. These work processes match the legal secretary and/or the medical secretary.

Table 7.1: Work processes of the secretary and the management assistant

Competences

There are 25 competences in all qualification files that can be subdivided into the four qualifications of the secretary professions. These competences can be found in table 7.2. Appendix B4 shows which competences are linked to which core tasks and work processes.

A	**Deciding and initializing activities.**	**B**	**Leading.**	**C**	**Guiding.**
D	**Paying attention and understanding.**	**E**	**Cooperation and deliberation.**	**F**	**Acting ethical and upright.**
G	**Building relationships and networks.**	**H**	**Convincing and influencing.**	**I**	**Presenting.**
J	**Formulating and reporting.**	**K**	**Applying expertise.**	**L**	**Using materials and inputs.**
M	**Analysing.**	**N**	**Investigating.**	**O**	**Creating and innovating.**
P	**Learning.**	**Q**	**Planning and organizing.**	**R**	**Aiming for the needs of the customer.**
S	**Offering quality.**	**T**	**Following instructions and procedures.**	**U**	**Dealing with change and adaptation.**
V	**Dealing with pressure and troubles.**	**W**	**Showing enthusiasm and ambition.**	**X**	**Operating entrepreneurial.**
Y	**Operating commercial.**				

Table 7.2: The competences in the qualification files

The complete qualification files (in Dutch) can be found on the website of ECABO (http://www.ecabo.nl). Due to their large size, these are not attached to this report.
In the qualification files are also more detailed (Dutch) descriptions of the qualifications, the core tasks, work processes and competences. A brief overview of this can be found in Appendix B.

The possible education program of ExplainiT

Appendix B5 shows a possible education program for the secretary and the management assistant.

7.1.2 Salesman

The salesman has a versatile package of tasks. In this package, contact with customers is the most important. This contact can be face-to-face, by phone or written. The salesman sells products and/or services to clients and is continuously looking for signals with regard to customers-, market- and product development. Normally, the salesman is expected to reach certain sales targets. He or she also prepares conversations with customers, surveys purchase- and information needs and advises the customer with their purchase. The studies within this branch are offered at level 3 and 4:

- Office salesman (Commercieel medewerker binnendienst), level 3. Crebo number: 90111.
- Traveling salesman (Commercieel medewerker buitendienst), level 3. Crebo number: 90113.
- Contact centre employee (Contactcenter medewerker), level 3. Crebo number: 90114.
- (Junior) account manager (Junior accountmanager), level 4. Crebo number: 93801.

ExplainiT aims for all four qualifications, because they all fit within their field of expertise.

Core tasks

The work within this branch consists out of three core tasks:

1. Examines the market and making plans.

The salesman collects relevant data and information about customers and products to solve the commercial questions/problems. He or she executes a desk research and does surveys. The salesman makes use of news- and market information sources to be up-to-date at all times. The salesman analyses information and processes the data by means of overviews, tables and graphics into sales- and management information. He or she signals in customer contacts relevant customer-, product- and/or market developments, secures the information in the system and communicates it directly to the executive and important colleagues.
The salesman analyses the collected information for his or her activity plan. Together with the team, a plan of action will be formulated for the customer group. Short-term sales activities must be planned. Further, the account manager plans marketing actions and invents a concrete fulfilment of the sales actions.
The salesman coordinates the execution and guards the progress of sales and account plans. He or she looks after the fact that plans will be converted into concrete actions. When necessary, the salesman distributes activities in the team.

Specific activities

Contact centre employee
The contact centre employee signals (within customer contacts) information about customers and products.

(Junior) account manager
The junior account manager searches for strategic information. To acquire that information, he or she performs market explorations and field research and maps the consuming market and the "commercial landscape" as complete as possible. The account manager makes proposals for sales activities. He or she does this based on an analysis of customer-, product- and market information. In the proposals, the account manager outlines the consuming market, the market- and branch developments, possible competitors and the financial aspects of the proposal. When requested, the junior account manager clarifies the proposals.
The (junior) account manager formulates (based on customer-, product- and market information and an account analysis) account plans with respect to his or her accounts.
The account manager reports in the account team about the progress of the account plans and takes responsibility for that progress. He or she also evaluates with the team the sales activities and proposes improvements.
(Qualification file Commercieel medewerker)

2. Executes the sales path.

The salesman focuses itself on the customer before he or she approaches that customer. The salesman goes through customer data and customer files and determines the way of approaching, the goals of the conversation and the proposal/offer. The salesman approaches potential customers. In a conversation, the salesman determines whether the customer is interesting or not and whether this customer fits within the target group of the organization. When the customer will be qualified as suitable, he or she informs that customer about the organization and the products/services they offer. The salesman tries to convince the customer about the advantages offered by the organization and its product/service. He or she then finishes the conversation and agrees with the client about future steps, like a personal appointment, sending some information, making a proposal or a record

of the customer within the customer file. The salesman records all necessary and obtained information and data about the customer contact.
The salesman performs a phone- or face-to-face sales conversation with the customer. During this conversation, he or she finds out what the specific needs and wishes of the customer are and links these to the possibilities of the product- or service assortment. The salesman answers questions of the client about applications, characteristics and the processing of products and services. He or she also gives advice, adapts to purchase- and resistance signals, makes the deal and takes offers- or order requests. The salesman also provides the customer with information materials. When the salesman is not able to give suitable advice, he or she contacts an experienced colleague or executive and gives feed-back to the customer.

The salesman makes (during or after the sales conversation), based on information brought forward by the customer and/or colleagues, a standard proposal. To do this, the salesman must make calculations and set up the price-, delivery- and payment conditions. To set up the delivery conditions, the salesman first checks if the products are in stock.
Before negotiating, the salesman deliberates with the executive and colleagues about the margins and negotiating space. He or she also negotiates with the customer to get an agreement on the proposal and to bring in this customer. The salesman tries to reach an agreement based on the demands of both parties.

Specific activities

Office salesman
The office salesman checks proposals made by the traveling salesman or (junior) account manager and makes sure the customer receives the proposal. Often, the office salesman also makes an appointment with the customer to discuss the proposal. The office salesman signals problems with the order, communicates these to the traveling salesman/account manager and mutual consultation should lead to a solution.

Traveling salesman
This kind of salesman collects missing information about the customer and its purchase history. The traveling salesman offers assistance with the delivery of the order.

(Junior) account manager
The account managers works out the proposal, of which he or she expects that this proposal will be decisive to go and actually work with that customer. Furthermore, the account manager prepares the deal with the account team. The account manager has multiple sales conversations with the decision making unit (DMU) of an account/organization. Organization processes and possible bottlenecks will be analysed during these conversations. After that, solutions will be examined. Based on such information, a value proposition will be made.
The account manager makes custom-made proposals and clarifies these always face-to-face. He or she tries to obtain the order right away, after which the order will be handed over to the office salesman.
The account manager discusses problems and solutions with customers. He or she also contacts the customer after the purchase, to find out if this customer is satisfied with the new product/service. The (junior) account manager guides colleagues during the sales path. The account manager makes sure that rules will be followed and activities performed. At the end, the (junior) account manager closes the sales path and reports to his or her executive.
(Qualification file Commercieel medewerker)

3. Builds relationships and maintains them.

The salesman signals complaints during contacts with the account/customer. He or she uses this information to propose some improvements to the executive about the assortment, the service provision or business processes. The salesman also receives specific complaints from customers (by phone, mail or during visits). He or she takes care of the complaint, shows respect for the customer and asks questions about the cause of the dissatisfaction. The salesman records the complaint and corresponding information and talks to the customer about a solution. After a while, the salesman checks if the customer is satisfied with the completion of the complaint.
The salesman performs promotion activities based on the operations described in the activity plan. He or she informs customers about the organisation and the assortment and introduces new products/services by means of presentations, demonstrations or mailings. The salesman takes care of customer questions and requests that are not directly related to the sales, but more to develop strong customer relationships and service provision. During contact moments, the salesman watches for unintentional signals of the customer, makes use of those signals and in that way optimizes the service. He or she verifies whether the customer is satisfied and adjusts the service when that customer is not satisfied. The salesman signals points for improvement in the service and passes these on to the executive. He or she uses CRM (customer relationship management)-tools to realize extra customer contacts, visits customers and informs customers about developments based on mailings and offers. Further, the salesman maintains the relationship by looking at ways to improve the satisfaction of customers and to strengthen those relationships.

Specific activities

Office salesman
The office salesman passes complaints of customers on to the traveling salesman and/or account manager, if they are the responsible contact person of that customer. The office salesman gives support to the exchange and the stand of the organization. He or she mainly pays attention to the preparation, like arranging promotion materials.

Traveling salesman
The traveling salesman arranges the crew for the exchange stand.

(Junior) account manager
The account manager coordinates the formulation and sending of mailings and promotion offers, prepares stands at (regional) exchanges and looks after seminars. He or she also takes care of the crew at exchange stands, pays visits to exchanges and gets together with accounts at exchanges. When requested, the account manager can help accounts/customers with their promotion activities.
The account manager is the first contact point for accounts and colleagues with questions about/for these accounts. With certain regularity, the account manager contacts customers to keep the relationship “warm”. He or she always takes the time to listen to the customer and to see if there are possibilities to sell products/services to this account. The (junior) account manager works towards an intimate relationship with the customer, both personal as business-like.
(Qualification file Commercieel medewerker)

Where does the salesman work?

In nearly all organizations, the provision of services is important. That is why a salesman can work in almost every company. The salesman can be active in service organizations, but also in commercial organizations, in small and medium-sized organizations and in large organizations.
The difference between the MBO levels of the qualifications is because of the context (working in an office, contact centre, or paying visits to customers), the nature of the product/service that is being

sold, the primary goal of the sales, the depth/width of the relationships with customers, the expectation of the customers and the size of the account.
(Qualification file Commercieel medewerker)

What are the interests of a salesman?

The salesman has, above all, a commercial attitude, by which customer direction and customer friendliness are very important. Besides that, the salesman must be good at verbal and written communication. Although every classification within the salesman branch are in general the same, the environment wherein those salesmen work are different, as well as their interests.
The traveling salesman and the account manager like to be outside the office and pick up signals from outside. They travel a lot, are independent and like to have a lot of freedom. They are proactive when it comes to customer relationships, whereby the (junior) account manager (more than the traveling salesman) aims for building and maintaining relationships.
The office salesman feels more at home within the office, with colleagues surrounding him/her and an executive nearby. Mostly, these salesmen works on assignments from the office itself. The office salesman likes to streamline processes from the inside and subsequently optimize these processes for customers and colleagues.
Depending on the organization/department where the contact centre employee works, he or she sells products/services, provides information, gives advice and solves complaints and problems. A contact centre employee must like to do customers a favour or to sell them something. This asks for the right attitude: a good contact centre employee is enthusiastic, shows respect, is friendly and a good listener. Because he or she cannot see their partner on the other side of the line, the way of expressing themselves has a great influence on the conversation. When the contact centre employee itself believes in the product it sells, the story sounds a lot more reliable. The contact centre employee mainly performs its activities behind a desk, with a computer, a headset and a telephone.
(Qualification file Commercieel medewerker)

Career possibilities

Office salesman
The office salesman can use the labour market to grow to a higher sales function, like sales manager or account manager and sometimes towards marketing-, communication- or banking and insurance functions. Another vertical grow possibility is office manager wholesale (“vestigingsmanager groothandel”). A horizontal grow possibility is towards the function of traveling salesman.

Traveling salesman
Depending on the company size, there are vertical grow possibilities to office export employee (“exportmedewerker binnendienst”), traveling export employee (“exportmedewerker buitendienst”), office manager wholesale and (junior) account manager.

Contact centre employee
Horizontal career possibilities within the contact centre are mainly about different and more complex projects. The vertical career possibilities within the contact centre itself are limited: the contact centre employee can grow towards the function of team manager. Outside the contact centre are also possibilities to grow, mainly in the service- and sales functions.

(Junior) account manager
The junior account manager can grow towards the function of senior account manager and regional manager.

Within the Intermediate Vocational Education, a participant with a salesman diploma (level 3) can start with a level 4 education. The most appropriate direction is towards (junior) account manager; office manager wholesale; office export employee; traveling export employee; employee marketing and communication; and salesman banking and insurance.
When the participant has a level 4 diploma, he or she can start a Higher Vocational Education. Especially the educations commercial economy ("commerciële economie"); small business and retail management; and sales- and account management are often taken into consideration.

Labour market

The labour market perspective for the office salesman is good; for the traveling salesman is sufficient; for the contact centre employee is good; and for the (junior) account manager sufficient. (Qualification file Commercieel medewerker)

Work processes

Table 7.3 shows the work processes belonging to the core tasks, for all qualifications of the salesman:

- Q1: Office salesman.
- Q2: Traveling salesman.
- Q3: Contact centre employee.
- Q4: (Junior) account manager.

A cross means that the work processes match the corresponding qualification.
(Qualification file Commercieel medewerker)

Core task	Work process		Qualification Q1	Q2	Q3	Q4
CT1: Examines the market and making plans.						
	1.1	Collecting customer-, product- and/or market information.	X	X	X	X
	1.2	Making proposals for the sales plan.				X
	1.3	Formulating an activity plan.	X	X		X
	1.4	Performing account analyses.				X
	1.5	Formulating account plans.				X
	1.6	Coordinating the execution of sales- and account plans and evaluation of those plans.		X		X
CT2: Executes the sales path.						
	2.1	Preparing the sales path and sales conversation.	X	X	X	X
	2.2	Acquiring customers and/or assignments.	X	X	X	X
	2.3	Selling product directed.	X	X	X	X
	2.4	Selling needs directed.				X
	2.5	Making offers/proposals and publishing them.	X	X		X
	2.6	Negotiating with the customer/account.	X	X		X
	2.7	Taking care of the (internal) order path.	X			
	2.8	Performing after sales.		X		X
	2.9	Guarding the progress of the sales path of the account.				X
CT3: Builds relationships and maintains them.						
	3.1	Signalling and taking care of complaints.	X	X	X	X
	3.2	Performing promotion activities.	X	X		X
	3.3	Maintaining active contact with customers.	X	X	X	
	3.4	Managing relationships.				X

Table 7.3: Work processes of the salesman

Competences

The 25 competences from the qualification files can be found in table 7.2. Appendix C6 shows which competences are linked to which core tasks and work processes of the salesman.

The complete qualification files (in Dutch) can be found on the website of ECABO (http://www.ecabo.nl). Due to their large size, these are not attached to this report.
In these files are also more detailed (Dutch) descriptions of the qualifications, the core tasks, work processes and competences. A brief overview of this can be found in Appendix C.

The possible education program of ExplainiT

Appendix C7 shows a possible education program for the office salesman, the traveling salesman, the contact centre employee and the (junior) account manager.

7.1.3 Linking training courses to the study programs

The first idea was to use the current training courses of ExplainiT to fill in the study programs. However, this is easier said than done. ExplainiT does not have a matching training course for every element of every module of every study. Some training courses fit the modules quite well, but still a lot of knowledge is missing. This means that new training courses should be implemented in the total supply of ExplainiT. It is wise to make partnerships with qualified people to "hire the knowledge" needed. This will increase quality and decrease costs (since it is not realistic to hire all teachers by yourself). But more about that in chapter 8.

7.1.4 Custom-made educations

There are parties in the market who offer fully specialized custom-made studies. For every education request they are able to organize a fitting program, for every level. An example of a successful supplier of such educations is Vak & Werk School.
At Vak en Werk School, competent education advisors analyse the education need and, based on that information, they make a plan of action. Within those custom-made educations, there will always be looked at the consistency with other internal educations, in order that it is possible to make one total program. They work together with multiple partners to be successful at analysing and executing the educations. The fact that you follow a study close to your function within an organization, and at the same time the possibility to get (a part of) a MBO diploma, is meaningful added value. Certain learning-working paths are there so employees can develop themselves better and improve in their functioning. The MBO diploma makes sure that advantages will rise for employees in their future career. (Website Vak & Werk School)
Offering custom-made educations is a nice way to distinguish yourself from competitors as an education supplier. However, it requires a lot of knowledge about the educations, about the market and about customers. Further, the Dutch ministry does not let you compile educations just like that. There are a lot of rules and conditions linked to it. As told before, ECABO has set up the qualification files for the branches *secretary professions* and the *salesman*. Every supplier can compose their own studies, but should stick to these files at all times.
It will be easier and wise for ExplainiT to start with standardised educations and to observe the new service and market for some time. When ExplainiT eventually has found their spot within this market, then they can try to make the educations more custom-made. But because of the complexity of starting new educations, the advice is to start easy. Ultimately, ExplainiT can also expand their number of studies.

7.1.5 Tax privileges

Educating at MBO level is stimulated by the Dutch government. They established a law called the "Wet Vermindering Afdracht", or WVA-onderwijs. This means that, based on the BBL education form, organizations can receive € 2,738 a year as a subsidy, for every fulltime employee who follows such an education. This has been explained in paragraph 2.2.4.

7.1.6 Inspection

The Dutch College of Education monitors the educational institutions. The way of monitoring has been changed the last years. Renewals in education are the cause of that. Nowadays, the College of Education pays more attention to the satisfaction of participants and the involvement of the region. The College of Education monitors the quality of the education and the exams of the institutions. When necessary, they tell those institutions what has to improve. (Website MBO2010)
As of February 2010, there is a list published on the website of the College of Education with all the "weak educations" of certain institutions. The first of July 2011, there were 15 very weak MBO educations and 186 MBO educations of which the examination was not good enough. The College of Education checks weak studies after an analysis of rural data or when there are complaints. The educations with a below-average examination were found at a random sample.

But when is an education of insufficient quality?

- Education is of insufficient quality when the study delivers too few qualified people and if the education process shows serious imperfections. The College of Education calls these studies *very weak.*
- The examining is of insufficient quality when it does not meet the exam standards. The fact that the institution make their own exams, can be a cause of insufficient quality. This is another reason to start a partnership with a qualified exam bureau. Sometimes institutions buy the exams at an exam supplier, which can also be the cause of insufficient quality. In all cases, the institution itself is responsible for the delivery of insufficient quality exams.

When an education is identified as *very weak*, this study will be placed in an overview. After about a year, there will be a follow-up study. If the quality is improved, the education will be removed from the overview. If the quality is not improved, the education will stay on the blacklist. Educations on the list will be under increased supervision of the College of Education. If the quality of the study or exam will not improve over time, the institution can lose their right to offer the education.
(Website Onderwijsinspectie)
Because of the Dutch law Wet Educatie en Beroepsonderwijs (WEB), institutions have to publish a report concerning the quality of the education and exams, every year.

7.1.7 Education parts and exemptions

It is also possible to complete only a small part or module of a certain education. At the exam bureau, that participant will then receive a modular certificate. In the future, he or she can finish the study by making use of exemptions. EVC can show the competences one has acquired in the past, which can reduce study time and costs in the future.

7.1.8 Online education

ExplainiT should explore the possibility to offer educations online in the future. If the organization succeeds at offering studies, this might be a nice continuation of increasing the offered value (Levenburg, 2005). However, it is recommendable to start with offering education the old-fashioned way, because ExplainiT has no experience whatsoever with offering services online. Also seeing the fact that they want to stick as close as possible to the current business model, offering online education at the start is not advisable.

7.1.9 The application procedure for offering competence-based education

ExplainiT can choose to start offering a total new study or an existing study. When an organization wants to set up a new education, this has to be approved by the ROC's, by Colo and at last by the

Ministry of Education, Culture and Science. When all parties agree on the education proposal, only then the study will be taken up in the Dutch Crebo register.
However, ExplainiT wants to implement 6 existing studies into their offer of services. They have to follow a procedure to request this. We will now summarize what ExplainiT should do to start offering the six “adult educations”.

Request form

As told before, starting in August 2012 every education will be competence-based. There were always two forms of education: end term based education and competence-based education. Organizations could request end term based education at the Dutch organization DUO (part of the Ministry of Education, Culture and Science) and competence-based education at the Dutch organization MBO2010. However, now the step towards competence-based education will be made, DUO will take over the tasks of MBO2010. The forms to request competence-based education at the website of DUO are not yet available.
To make a long story short: ExplainiT has no choice but offering competence-based education (because end term based education will totally disappear in a year). Last year, the forms to request this should be handed in half February 2011 (for the study year 2011-2012). At this moment, the request forms at the website of DUO-CFI are not yet available, but since in August 2012 every education is competence-based, these forms will be published on their website soon. The request also means a registration in the Crebo register.

This comes down to the fact that we cannot show the form to request the education. However, these forms will not differ a lot from the current form of DUO-CFI for offering end term based education (Appendix D1). Appendix D2 shows the information form of DUO about the documents organizations have to send together with their request and more important information. For the competence-based education, organizations have to hand in the request every year.

Attachments

Together with the request form, the organization should obligatory send some information and data that shows that the quality of the education is sufficient and that they live up to article 1.4.1, paragraph one of the WEB (Appendix E).

In the description of the system of quality control, the organization should present:

- To what educations this system is applying and what methods of quality control will be used.
- The qualifications of the staff associated with the education.
- Based on what competences independent experts will be involved at the frequent assessment of the quality of the education, what activities they will do and how often these experts are used.
- The way of evaluation of the system of quality control, both internal and external. Further the criteria that the organization uses for evaluating their own performances will be described.

Furthermore, the organization should describe:

- In what way participants will be informed about the consequences for participating at a non-financed institution.
- In what way participants will be informed about the possible alternatives of completing the education, when the participant stops with the education at the organization.
- In what way the availability and quality of the accommodation of the education is organized and guaranteed.

(Form: “Voorlichtingspublicatie”)

Together with that information, the form should be send to DUO in Zoetermeer.

Inspection

DUO checks whether all the necessary information has been send. After that, they send the information to the College of Education. The College of Education will test the qualitative aspects in practice by means of quality surveys. This can be both files surveys and a survey at the organization itself. When the quality of the education and exams is not sufficient, the College of Education can decline the request. When the quality is sufficient, the documents go back to DUO. DUO will inform the organization if the request is approved or not. When the decision is positive, the organization (if it requested for educations for the first time) will receive a so-called brinnumber. This is a number that every organization that is recorded in the Crebo register should have.
This whole process takes about 3 months. When there is a reason for the College of Education for more surveys, this deadline can be expanded with (maximally) another 3 months.

Student finance

Participants of fulltime studies can receive a student aid in the form of a monthly payment. However, participants in BBL studies will not receive that payment, because they also work at an organization. They are no fulltime students.

7.2 Organizational development

In the direct future, ExplainiT is planning to offer training packages for organizations. In that case a firm can improve itself in a certain area, for example team development. This is a potential future value proposition and can lead to an increase of the turnover per customer. Implementing organizational development is way easier than implementing educations and there is no interference from the government. For ExplainiT it actually means nothing more than offering their existing service (training courses) in a new wrapping. One aspect that becomes rather important when offering organizational development packages is consultancy. (Future) consultants of ExplainiT will have to advice customers professionally. They should be able to expose the customer its imperfections, inefficiency and where there is room for improvement. That advise should then lead to the selling of (multiple) training courses. There are prominent organizations (e.g. Schouten & Nelissen, Boertiengroep) who are successful in offering organizational development. (Website Schouten & Nelissen)(Website Boertiengroep)

The plan is to offer 8 of such training packages, all with their own training courses where customers can choose from. These 8 categories are: the new world of work, customer orientation, team development, project-based working, culture change, conflict- and aggression control, business communication and sales power. Together with the management of ExplainiT, these 8 categories have been developed and training courses are assigned to them.

7.2.1 The new world of work

A new phenomenon of the last years is the so-called “new world of work”. With the latest technologies, new opportunities arise for organizations to work in a different way. This means that firms make use of these technologies more efficiently and effectively. New forms of collaboration and directing arise, together with more creativity and responsibility. The new world of work makes an organization more productive. The structure and culture of the firm, but also the workplace itself is being renewed. With the help of mobile phones, computers, the Internet (with all the social media) and other new technologies, our knowledge work is being managed. ExplainiT has multiple training courses that can help organizations to make their step towards the new world of work. With skilled trainers and the right consultancy, ExplainiT can also help with implementing the new world of work within their client’s organization.

Corresponding training courses

- Persoonlijke effectiviteit ("Personal effectiveness")
- Omgaan met verandering, de flexplek ("Dealing with change, the flexible workplace")
- SharePoint training courses
    - SharePoint Content Management
    - SharePoint Site Management
    - Configuring and Administering Microsoft SharePoint 2010
    - Microsoft SharePoint 2010, Application Development
    - SharePoint Designer
    - Advanced SharePoint Development
- Social media training courses
    - Haal alles uit LinkedIn ("Get everything out of LinkedIn")
    - Zakelijk gebruik van Twitter ("Businesslike use of Twitter")
    - Social media voor bedrijven en instellingen ("Social media for organizations")
    - Google AdWords
    - Google Analytics

7.2.2 Customer orientation

Customers determine the success of an organization. Customer orientation is about the experiences employees give to their clients. The customer is the boss, the customer tells an organization what to do. Therefore, these clients are very important and it is wise to maintain good and strong relationships with them. Commitment of employees is of great value. ExplainiT can offer this form of organizational development to learn organizations (and the responsible employees) how to become successful in maintaining (external) customer relationships. Also internal customer orientation is important and should not be forgotten. ExplainiT should bring customer directed work in practice. Three of their current training courses can help with that.

Corresponding training courses

- Klantgericht telefoneren ("Customer oriented phonecalls")
- Klantgericht denken en handelen ("Customer oriented thinking and acting")
- Klant- en doelgericht schrijven ("Customer- and goal oriented writing")

7.2.3 Team development

Self-directing teams are an important part of modern organizations. Teams can help to increase the performances of certain organizations, by converting strategic goals into concrete results. By paying extra attention to the development and the establishment of such teams, the cooperation will improve. ExplainiT can help organizations with their team development by offering the right combination of training courses, together with coaching and consultancy.

Corresponding training courses

- Effectief samenwerken ("Effective cooperation")
- Coachingsvaardigheden ("Coaching skills")
- Verbeteren van teams ("Improving teams")
- Teamdag ("Teamday")

7.2.4 Project-based working

Project-based working means that an organization works effectively and controlled towards their goals. Routine activities are sometimes not enough. It is also about how an organization deals with risks, when they have to leave their standard activities. Project-based working is important for controlling and effectively planning the projects. ExplainiT offers training courses for project leaders and members of project teams. By means of a custom-made program, organizations can improve as a whole. Consultancy before, during and after the process should make sure that the customer organization can successfully implement this project-based working.

Corresponding training courses

- Leidinggeven aan projecten ("Leading projects")
- Projectmatig werken ("Project-based working")
- Projectmanagement
- Microsoft Project
- PRINCE2

7.2.5 Culture change

It is pleasant for every employee to work in a healthy corporate culture. In such a culture, there is besides attention for productivity and goals of an organization, also attention for the employees itself. Sometimes it is necessary to change a corporate culture. When there are disappointing company results, when there are disagreements in the organization, or when you have to deal with a merge of multiple organizations, culture change can be the right solution. ExplainiT wants to help organizations that are facing such challenges. Again, this can be done by means of training courses and consultancy.

Corresponding training courses

- Omgaan met verandering en reorganisatie ("Dealing with change and reorganization")
- Omgaan met verandering, de flexplek ("Dealing with change, the flexible workplace")

7.2.6 Conflict- and aggression control

Conflicts are working illuminated; they solve something; offer solutions to certain work problems and improve the cooperation. Besides conflicts, organizations sometimes have to deal with aggression. It is important how organizations deal with such things. ExplainiT can offer solutions for situations wherein organizations are not capable anymore to discuss problems together. It is possible by means of coaching and consultancy to guide organizations towards a successful solution for aggressive situations. ExplainiT wants to work, together with the customer, towards making and filling in the right policy. They have experiences from the past (with their training courses) that will help bringing forward different advices and solutions.

Corresponding training courses

- Omgaan met stress en werkdruk ("Dealing with stress and workload")
- Omgaan met agressie ("Dealing with aggression")
- Omgaan met moeilijke mensen ("Dealing with hard people")
- Onderhandelen en conflicthantering ("Negotiating and conflict exertion")

7.2.7 Business communication

Employees should be able to communicate well, both internal and external. This goes by phone, face-to-face and written. Good communication takes care of brightness, makes sure that processes go by more quickly and that tasks or responsibilities are clear. ExplainiT can help organizations to optimize both internal and external business communication with their corresponding training courses below.

Corresponding training courses

- Coachingsvaardigheden ("Coaching skills")
- Klantgericht telefoneren ("Customer oriented phonecalls")
- Communicatieve vaardigheden ("Communicative skills")

7.2.8 Sales power

Keeping a sales conversation is not easy. A good attitude and nerves are required. It is difficult to make professional salesman out of your employees; people who actually sell their products and services. ExplainiT offers training courses that can help organizations to get more output out of phone and face-to-face conversations with customers. Together with coaching and consultancy, this can help organizations to improve their sales power.

Corresponding training courses

- Account management
- Commerciële binnendienst (“Commercial office sales force”)
- Persoonlijke verkoop en acquisitie (“Personal sales and acquisition”)
- Telefonische verkoop en acquisitie (“Sales and acquisition by phone”)

7.3 Conclusion

In this chapter, the potential future value propositions are discussed. Implementing educations is a long process and the organization will have to deal with a lot of inspections, rules and interference of the government. The fact that ExplainiT wants to stay as close as possible to their existing business model, can be a problem here. There is no doubt that the business model will substantially change and ExplainiT will have to hire new employees and make some partnerships to succeed. Those are just some things that the company should keep in mind.

Offering forms of organizational development is a goal of ExplainiT in the direct short-term future. For the different categories, ExplainiT plans to organize workshops and seminars (next to the training courses). These should help to give customers more information and insight about important and relevant points of interests. Offering organizational development packages is offering the existing service in a new wrapping. Consultancy will play a more important role, when it comes to offering organizational development.

8. The potential future business model

8.1 Introduction

In this chapter we will outline the potential future situation of ExplainiT. How can the value proposition increase? What activities will stay the same? Which new services can the organization offer in the future?

8.2 The future business and its strategy, business model and processes

We will look at the potential future business strategy of ExplainiT, at the value they can offer customers in the future and at the business processes. The results will be outlined in the potential future Business Model Canvas (paragraph 8.3). This BMC can easily be compared to the current one (paragraph 6.3).

8.2.1 The business

In the potential future business, ExplainiT can expand its value propositions by offering new services.

Value proposition 1: skill training courses

ExplainiT is specialized in offering management-, communication- and ICT skill training courses. They are active in almost all parts of The Netherlands and aim for all branches. The overall goal is to fulfil the customer's need: achieving knowledge to improve in a certain area. The customer can train in-company or at one of the 12 locations of ExplainiT and can train individually, in groups with colleagues and through open entry. Offering training courses will always be the core business of ExplainiT.

Value proposition 2: organizational development

In the short-term future, ExplainiT can expand its value proposition with organizational development training packages. The plans for this are pretty advanced already and it is not really the question if, but more when ExplainiT will be able to offer this service completely. Professional consultancy should lead to selling multiple training courses at once.
The organization plans to offer 8 packages of training courses. Customer organizations can improve itself in a certain area:

- The new world of work.
- Customer orientation.
- Team development.
- Project-based working.
- Culture change.
- Conflict- and aggression control.
- Business communication.
- Sales power.

Every category has its own training courses. Actually this organizational development is nothing more than wrapping the training courses in a different package and persuade the customer to attend more than one training course. For the multiple subjects, ExplainiT can organize workshops and seminars for their customers.

Value proposition 3: educations

A more complicated potential new value proposition and service are 6 educations ExplainiT plans to offer in the future. The most suitable way to do this is offering competence-based Intermediate Vocational Education in the BBL. This means that the participant or student combines working and learning. He or she works at an organization and follows a study at the same time. The focus lies on the practice part of the education and on participants older than 18 years (adults education). At the end, the student will receive the corresponding diploma, if the study will be completed successfully.

ExplainiT aims for two different qualification levels in two different branches: *secretary professions* and *the salesman*. The educations or qualifications belonging to those branches are:

Secretary professions

- Secretary, level 3, crebo number: 95380.
- Management assistant, level 4, crebo number: 95391.

Salesman

- Office salesman, level 3, crebo number: 90111.
- Traveling salesman, level 3, crebo number: 90113.
- Contact centre employee, level 3, crebo number: 93114.
- (Junior) account manager, level 4, crebo number: 93801.

The knowledge centres in The Netherlands have made so-called qualification files about every qualification. ExplainiT should stick to these files at all times. They describe the core tasks, work processes and competences belonging to the educations. However, implementing educations is not as simple as linking training courses to the educations. The studies are a lot broader than (for example) 20 training courses. (Qualification file Commercieel medewerker & Secretariële beroepen)
ExplainiT should at least introduce new training courses in their supply. They can hire the knowledge from external freelance teachers after ExplainiT made their own study program. Competitors like NCOI also work with freelance teachers. (Website NCOI)
Partnerships are needed to be able to offer the 6 qualifications and to be able to assess the participants and giving an exam/diploma. But first of all, ExplainiT should get a positive feedback from the Dutch College of Education. The first possible date to implement and start educations is August 2012.

8.2.2 The business strategy

Should ExplainiT change its current business strategy when they offer more and new services and value propositions? “A strategy explains how organizations hope to do better than their competitors.” (Al-Debei & Avison, 2010) As told before, Michael Porter distinguishes 4 different strategies: cost leadership, differentiation, cost focus and differentiation focus.
At this moment, ExplainiT follows a differentiation strategy. With the introduction of the new services, this strategy will not change. Teece (2010): “Adding new services can make sure that you will stay ahead of your competitors.” The organization aims for the whole training/education market and try to defeat their competitors based on personalized service. This customization and the “personal touch” should be maintained, because those are the characteristics of ExplainiT that customers like.
For some services however, the flexibility cannot be that high. When we look at the educations, ExplainiT should stick to a lot of rules, guidelines and conditions. There will also be interference from the government. It is important that ExplainiT will maintain a unique and superior image of itself in the future and makes sure that customers know what services the organization offers. The core characteristic must still be customization and the organization should perhaps add some more unique aspects to the potential future services (e.g. exam guarantee for the educations).

8.2.3 The business model

Now we will fill in the different aspects of the potential future business model.

Customer segments

ExplainiT will focus itself on the total training/education market. With their different services, they are able to offer knowledge to a large part of the market and do not have to focus just on people who want to attend a training course. There is no distinction between different customer segments, when we look at training courses and organizational development. When we look at the educations, the focus lies on secretary & support and marketing & sales and on people older than 18. In the future, this can increase when ExplainiT considers offering more educations.
Compared to the current business model, there does not change a lot here: ExplainiT still focuses on the total market. Only with the educations they aim for a smaller part of that market.

Value propositions

The value proposition of ExplainiT has to be unique in some ways to defeat competitors and attract customers. Customization and flexibility are the obvious unique characteristics of ExplainiT (now and in the future). The customer relationships are the most important resource for ExplainiT and that is why they will do anything to please that customer to keep those relationships strong. The account manager is very important in this process. Competing based on low prices or speed is difficult in this market.
Other possibilities to compete are offering training and education online, offering shortened programs and offering home studies. The training courses, organizational development training packages and educations are all about customer experience; ExplainiT offers qualitative value.
Compared to the current business model, there does change a lot in the value propositions. ExplainiT will expand their services and the offered value to customers. Organizational development and the educations are those new value propositions and should lead to an increase of the turnover per customer.

Channels

We mentioned the channel phases before: awareness, evaluation, purchase, delivery and after sales.
ExplainiT should create awareness that they offer more services than just training courses. The customer must know that there is an opportunity for organizational development and to follow a certified Intermediate Vocational Education as a secretary or salesman. This can be done by advertising and the phone network of account managers. Organizational development and the educations should be taken up in the brochure ExplainiT releases every year and sends to customers. The customer can then evaluate the services of ExplainiT.
When the customer and ExplainiT agree on all points (like price, location, trainer/teacher, study program, exam, etcetera) the purchase can be made (this process will take a lot longer for educations than it does for training courses). For the educations, the customer should get the opportunity to pay in phases, so they are not frightened by seeing the price of an education. After the purchase, the account manager can arrange study materials and prepare the education.
The actual training course or education is the delivery of the service. The location can be at the customer, or at a location of ExplainiT. After this is completed, ExplainiT must take care of after sales support by keeping in touch with the customer. There should be a continuous evaluation of the service, during and after the delivery of that service. After an education, an exam should take place at an external location of an external exam bureau.
For the training course service, all five phases (except the hiring of trainers) are direct and owned channels. However, for the educations more indirect partner channels are needed. Freelance experienced teachers should be hired, a partnership with a supplier of education materials would be

wise, external exam locations and assessors should be hired. The actual service ExplainiT will deliver is bringing all those parties together to offer the education to the customer.
The channels are different for all the services. For organizational development, consultancy becomes very important. This advice to customers is the start in the whole process and should lead to selling training courses. The education channel will be more complicated than the other channels, because ExplainiT will have to arrange more things (think about teachers, materials, assessors and an exam location). (Qualification files)(Website NCOI)

Customer relationships

The customer has a need for knowledge, for example to become more flexible as a person, to improve as an account manager, or to improve the organization as a whole (e.g. to deal with culture change). ExplainiT can satisfy that need by offering training courses, organizational development (in combination with consultancy) and 6 educations.
At this moment, every customer is connected to one account manager. The tasks of the account managers are customer acquisition and customer retention. Everything they do is to establish relationships with customers. These relationships are very intimate and are often established over a longer period of time. Customization is hereby very important: the personal touch ExplainiT gives to the relationships with their clients is one of their strong points. For ExplainiT counts: “the customer is king”. This is also called “dedicated personal assistance”. (Osterwalder & Pigneur, 2010)
For the training courses and organizational development, this dedicated personal assistance is still possible. For educations it is more difficult, because ExplainiT then depends on external parties. The contact with the customer from ExplainiT does not have to change, but the flexibility will, without a doubt, decrease when we look at educations. For offering training courses, which is the most important service of ExplainiT, this dedicated personal assistance can and should be maintained.

Revenue streams

ExplainiT can offer three different kinds of services/value propositions in the future. The customer has to pay for the skill training courses, the organizational development training packages and for the educations. The packages for organizational development are nothing more than multiple training courses, but in combination with consultancy. The customer needs to pay for that consultancy and for the training courses. Perhaps customers should get a discount when attending multiple training courses, but that is up to ExplainiT. These revenue streams are transaction revenues (one-time payment afterwards) or recurring revenues (multiple payments afterwards). They are generated by usage fees, because the more you use the service, the more you have to pay for it. The pricing mechanism is fixed.
For the educations, the price is a lot higher than for training courses. These revenues can be transaction revenues (when the customer wants to pay in one time) and recurring revenues (when the customer wants to pay in phases). When the customer wants to pay in one time, ExplainiT can reduce the price a bit. The revenues are also generated by usage fees and the pricing mechanism is fixed.

Key resources

The physical assets of ExplainiT are the training/education locations, computers, phones, desks, training/education materials (books, brochures, readers, pencils), etcetera. ExplainiT does not now, nor in the future offer a physical service. Human assets are the most important assets for the organization. Everything is about strong relationships with customers, teachers/trainers and suppliers. The sales force is responsible for those relationships. The trainers or teachers should bring the required knowledge to ExplainiT and its customers.
The financial assets are still the accounts receivable. The intellectual assets are the partnerships with ICT trainers and the potential partnerships with the parties mentioned in the paragraph “key

partners”. The customer database will in the future be Microsoft CRM. Together, “the team of (unique) resources will offer value to customers”. (Möller, 2006)
There does not change a lot when we look at the key resources. The customer relationships will remain the strongest resource. For the educations are more partnerships needed. The image of ExplainiT and the “personal touch” must not change.

Key activities

The key activities of ExplainiT offer a value proposition and satisfy a need of customers. It all starts with the acquisition of customers and subsequently maintaining the relationships. The skill training courses, organizational development and educations are all the same services in some way. They all satisfy the need of knowledge of customers. These clients come to ExplainiT to expand their skills and competences. The operations of ExplainiT are dominated by problem solving activities. “Their business model calls for activities such as knowledge management and continuous training.” (Osterwalder & Pigneur, 2010)

Key partners

Organizations make partnerships to optimize their business model, to reduce risk or to acquire resources. In case of ExplainiT, all three motives can be applied. They always try to optimize their business model and create as much value as possible for customers (mission ResourcIT). Most partnerships of ExplainiT, now and in the future, are made for acquiring resources. The current strategic alliance with the organization who arranges the freelance trainers and individual agreements of collaboration with freelance trainers are examples of current partnerships for the skill training courses.
For organizational development, ExplainiT can cooperate with consultants. For the educations, ExplainiT has to follow a lot of rules and restrictions. The educations have to be of a certain level/quality and to be able to offer such quality studies, you do need qualified teachers, the proper study materials, a good classroom, guidance from the supervisor(s) at the trainee post and from ExplainiT. Knowledge centres will inspect the supplier organization, the studies, teachers, etcetera. (Website ECABO) Also the exam should be official and of the right quality. And then you also have the subsidy laws, which require partnerships.
ExplainiT can best start partnerships with freelance teachers, assessors (for assessing on the work floor at the learning organization), exam bureaus and EVC suppliers. These are all examples of partnerships to acquire resources that ExplainiT does not have (yet). Perhaps in the future (since ExplainiT wants to offer as many parts of the value chain by itself), they can implement some of those activities by themselves (for example a location for exams). These are all *strategic alliances between non-competitors.* Also for the delivery of education materials, it might be proficient to start one or two partnerships with suppliers for a longer period. This is an example of *a buyer-supplier relationship to assure reliable supplies*.
The motive of ExplainiT to start the partnerships is *the acquisition of particular resources and activities.* They are there for the need to obtain knowledge and to reduce costs.
As told before, the thing ExplainiT does is bringing all those parties together: the student, the teacher, the customer organization, the classroom, the assessors, the exam location, the exams, the study materials and possibly the EVC procedure.

Summarized, ExplainiT definitely needs partnerships to be able to offer education. They can work together with parties for:

- *Acquiring teachers:* the best way to do this is looking for freelance teachers. People that can be planned when needed. Competitors also offer educations with the help of external freelancers.

- *Education materials:* there are, of course, study materials needed. For example, for the delivery of books, ExplainiT can try to find a long-term partner that can deliver those books for a good price.
- *Assessors:* agreements with assessors are needed. Those assessors are experienced in criticizing people at the work place. An partnership with *Doceo* can be helpful there. They can also help with assessing people, what can lead to an EVC certificate.
- *EVC:* when a person wants exemptions for some parts of the education, because he or she already has that knowledge acquired in the past, EVC is an outcome. EVC has the advantage of converting work experience into acknowledgement. In that case, the participant can show the knowledge and skills he or she already has. There are qualifications for EVC in the Dutch education. That is why ExplainiT should work together with acknowledged EVC suppliers. Examples are *ECABO*, *EduPer*, *Doceo, EVC Makelaar* and *EVC Centrum Nederland*. These parties are able to scan people and give them a certificate that shows their acquired competences. (Website Doceo)
  EVC Centrum Nederland for example, provides free "quickscans" to analyse if an EVC procedure is interesting for an employee. Within a week, that employee will get an advice from the company. When the procedure will continue, that employee can download a form at the website of EVC Centrum Nederland and eventually receives a certificate of experience and education advice (for the price of € 1,000). (Website EVC Centrum Nederland)
  With a certificate of experience, people can get exemptions for certain parts of the education. Organizations can get a discount of € 329 from the WVA law.
- *Exams:* especially for the exams, ExplainiT should find a suitable partner. This is more efficient than offering the exams by yourself (because of the laws, rules and restrictions connected to it). Parties like *ECABO, NIMA, EPCN, KCH Examens* and *CertiNed* can help. ECABO, for example, has rebuild their exam location into a real office (with desks, computers, a reception, meeting rooms, etcetera). Participants of the exam have to deal with real-life situations, by which actors play the roles of customer or colleague.

ExplainiT can try to offer their studies with an exam guarantee. This means that when a participant fails to pass the exam the first time, they do not have to pay for the study again to do the exam a second time. Customers will be attracted by the fact that they can receive their diploma for a fixed amount of money. If ExplainiT can set up a high-quality education program, with qualified teachers and a good exam, the percentage of participants that will graduate in one try will increase. In that case, an exam guarantee can be a competitive advantage and a nice way to attract customers.

Cost structure

The focus of ExplainiT lies on the creation of value, rather than on reducing costs. A high degree of personalized service is a characteristic of value-driven cost structures.

The important costs for ExplainiT stay mostly the same in this new business model:

- *Hiring (freelance) trainers and teachers:* these people are often very specialized in certain areas and therefore ask a high remuneration in exchange for their service. This is an example of variable costs: the more or the longer you use a trainer, the more it will cost.
- *Personnel expenses: t*he staffing costs of ExplainiT. This is an example of variable costs: the more an employee works, the more it gets paid.
- *General costs: e*xamples are hire and rental charges (fixed costs); costs for gas, water and electricity (fixed costs); and costs for the lunches of course members (variable costs: the more course members, the higher the price).

The partnerships needed will cost money, but when you do not establish partnerships, it will often cost even more money. The fact is that parties help each other out and do each other a favour. For example, ExplainiT educates people and eventually sends them towards the exam bureau (that

bureau will take advantage from that setup too, because they can attract customers more easily). Both parties can take care of their own costs and take their own profits. The same goes up for partnerships with EVC suppliers.
The price for a training course or education depends on the costs involved. ExplainiT can recharge the costs made in the price. However, the price may not rise too much because customers can easily change their training/education supplier. But this may never impair the quality of the services offered by ExplainiT.

8.2.4 The business processes

ExplainiT tries to offer as much value as possible to their customers. That makes sense because for training and education the customer often thinks quality is more important than low costs. As said before, the most important processes for ExplainiT are customer acquisition and subsequently customer retention. It is possible to bind customers to your organization for a longer period of time in this branch. When experiences from the past were good, organizations often come back to the same training and education supplier. ExplainiT has a large customer file with long-term relationships with a lot of organizations.
The process of value creation was as follows:

Product/Service creation → Order delivery → Service assurance

The process of selling training courses to customers is like figure 6.1. For organizational development, this process is roughly the same. Except that preceding the actual sale of the training courses, consultancy will be given at the customer organization. Professional consultants can judge in what area's the organization can improve itself in and subsequently ExplainiT can offer the training courses. Shortly, in between the steps "Customer retention" and "Planning training course" comes a new step: "Consultancy".
For selling educations, this process is more complicated:

- *Customer acquisition:* for the acquisition of customers, account managers cannot simply call organizations and ask for people that want to attend an education. It is more important that ExplainiT creates awareness at learning organizations that the possibility to educate is present at ExplainiT. Advertising is very important at this step. The customer must come to ExplainiT, not the other way around. Account managers can also create that awareness at the customer organization while they make phone calls.
- *Customer retention:* again it is important to keep in touch with interested learning organizations just enough. Not too much (what will annoy them) but also not too little (then they will forget about ExplainiT). Personal meetings of account managers with customer organizations is advisable, because it would be hard to convince people to start an education on the phone. Again a mailing and the brochures of ExplainiT can help to create awareness.
- *Proposals:* when the customer is interested, account managers make a proposal of the education. When both parties agree on price (and the payment in phases or not), location and duration, the planning of the education can start. A skilled teacher has to be found, training materials have to be ordered, contracts with exam bureaus and EVC suppliers have to be made (when the customer wants to make use of that) and assessors have to be found.
- *EVC:* perhaps the customer wants to monitor its current competences before the education takes place. Than he or she might get exemptions of some parts of the education. This customer can then be referred to the website of an EVC supplier (e.g. EVC Centrum Nederland).
- *Education:* when everything has been arranged, the education can take place. This education will often take place in 1 or 2 years and consist out of multiple day sessions. During and after the education, ExplainiT must keep in touch with the customers (by phone and personal contact). When the education is finished, the customer can be send to the exam bureau to make his or her exam and get a diploma.

8.3 The potential future Business Model Canvas

Key Partners
- Strategic alliance with organization for ICT trainers.
- Collaboration with freelance trainers.
- Buyer-supplier relationships to assure reliable suppliers (materials).
- ExplainiT prefers to own as many resources as possible and perform every activity by itself.
- For acquisition of particular resources and activities, partnerships are needed.
- Org. dev.: agreements with consultants.
- Education: multiple partnerships (e.g. teachers, assessors, exam bureaus).

Key Activities
- Skill training courses, org. dev. (with consultancy) and educations to satisfy the need.
- Account managers key activities:
  - Customer acquisition.
  - Customer retention.
  - Phone network.

Key Resources
- Physical: e.g. training /education locations, pc's. Service not physical.
- Human: acc. man., trainers/teachers.
- Customer relationships: important resource.
- Financial: acc. receivable.
- Intel.: partners, MS CRM.
- Customization → strong image/brand.

Value Propositions
- VP: skill training courses, org. dev. and educations.
- VP is unique when we look at:
  - Customization.
  - Personal touch.
  - Leads to strong, long-term customer relationships.
  - 3 different services.
- Customer experience = qualitative value.
- No competition based on prices or speed.
- Future: perhaps more unique activities (e.g. online education).
- Organizational development: consultancy is important.

Customer Relationships
- Customer: develop skills (e.g. more flexible).
- Acc. man.:
  - Customer acquisition.
  - Customer retention.
- Intimate relationships.
- Customize & pers. touch.
- Education: less flexible: governm. interference.

Channels
- Reaching customers and creating awareness.
- Org. dev.: consultancy → customer buys service → evaluation → after-sales.
- Education: Multiple indirect partner channels. Most complicated process. Bringing parties together.

Customer Segments
- Focus on whole training/education market.
- No distinction between different segments.
- Usually focus on organizations with more than 100 employees.
- Differentiation strategy.
- Examples of customers: hospitals, universities, communities, district courts, departments, building societies, police departments, the army.
- Educations: focus on secretary & support and marketing & sales. Focus on adult education (>18).

Cost Structure
- Cost structure is value-driven. High degree of personalized service. More difficult for educations (depends on partners).
- Important costs:
  - Hiring trainers/teachers.
  - Personnel expenses.
  - General costs.
- Partnerships will cost money.
- Costs are recharged in the training course price. Quality most important.

Revenue Streams
- Multiple value propositions → more revenue streams.
- Customer pays for the offered value/skill training course (package)/education. Price of education is higher.
- Mostly transaction revenues (one-time payment afterwards).
- Also recurring revenues (e.g. paying by instalments for educations).
- Revenue streams are generated by usage fees (particular service, the more you use it, the more you pay).
- Pricing mechanism is fixed.

Note: The business model elements are more extensively described in paragraph 8.2.3.
Changes in the BMC (compared to the current one in paragraph 6.3) are highlighted in yellow.

9. Conclusions & recommendations

9.1 The situation of ExplainiT

ExplainiT offers management -, communication - and ICT skill training courses. They have a lot of customers, but the turnover per customer is too low. There are multiple ways to increase that turnover per customer and this research has been done to reveal the possibilities in the market. Therefore we have executed a delta analysis, by which we have compared the current business model of ExplainiT with the potential future business model. A business model consists out of the elements that, taken together, create and deliver value to the market. The central research question, to come with a solution for the problem above, is as follows:

How can the current business model (and value proposition) of ExplainiT be reshaped, to increase the turnover per customer?

To answer this question, we first described ExplainiT and the service they offer. The current situation has been outlined in a so-called "Business Model Canvas" (a figure to briefly describe a business model). But to offer more value to the customers and increase their turnover, ExplainiT has to introduce new services. A condition was that offering skill training courses would remain the most important service of ExplainiT, and that is why the organization wanted to stick as close as possible to their existing business model. That is why we talk about: "reshaping the business model".
Concerning the new services, ExplainiT has an idea about what services they want to offer: organizational development in combination with consultancy and Intermediate Vocational Education (Dutch MBO studies). This research was conducted to see if those services are feasible to introduce at ExplainiT and to clarify the steps they should follow to do that.

9.2 Delta analysis

We have performed a delta analysis, by which we looked at the current situation of ExplainiT and the potential future situation. Both have been outlined in the Business Model Canvas and compared to each other. Below we describe the main differences of the two business models. We have divided the canvas into three parts: value propositions, the internal capabilities (that consists of key partners, key activities, key resources and cost structure) and the external environment (that consist of customer relationships, customer segments, channels and revenue streams).

Value propositions

ExplainiT can offer more services and value in the future by introducing organizational development and educations to their customers. Organizational development training packages are easy to implement. Consultancy will become an important aspect of that organizational development. Consultants advise the customer where they should improve, what should lead to selling training courses (packages). Educations are harder to implement and the process is subject to heavy interference from the government.
The unique aspects of ExplainiT its current value proposition (customization, personal touch) can be used for the potential future value propositions. This is easier for organizational development than it is for educations (less flexibility due to interference from the government).

The internal capabilities

ExplainiT likes to own as many resources and perform all activities by itself. However, for the educations they need external parties. It is hard and not logical to perform all activities in this education process (e.g. hiring teachers, providing exams, providing EVC procedures) by yourself. Therefore the organization must depend on multiple partnerships. For organizational development,

ExplainiT needs consultants (either hire them by yourself or by means of a partnership) to improve the sales.
The key activities expand, because more services are offered. Account managers still make use of their phone network (customer acquisition and customer retention). At this moment, they arrange the whole training process (e.g. trainers, location, books, paperwork). For organizational development, this does not really change, but for educations it will be hard to arrange the whole process.
The key resources will also change. More employees (which means more desks, computers, phones, etcetera), teachers and partnerships are needed. This also means more costs (especially in hiring teachers/consultants and personnel expenses.

The external environment

ExplainiT has a lot of long-term, intimate customer relationships. This should be maintained in the future, however offering educations will mean that you will have less flexibility (due to the interference from the government).
For organizational development, the customer segments where ExplainiT aims for do not change. They aim for the whole market and do not focus on just one or multiple segments. For the educations, they aim for the segments “secretary & support” and “marketing & sales” (at least at the start).
The channels to reach the customers and provide the value do change a bit. Organizational development means that consultancy will be added at the start of the channel. Because of the partnerships, the channel phases when offering educations will become more complicated. But both new value propositions can lead to a higher turnover per customer and more revenues.

9.3 Conclusion

Offering organizational development is a goal of ExplainiT in the direct short-term future and is definitely feasible. Actually it is nothing more than packages of multiple training courses about a certain subject. There aren’t a lot of costs involved (because you offer your current service only in a different way). Only costs for consultancy will arise. Consultants can play an important role at ExplainiT in the future. They can be the “missing link” in the current business model. Competitors like Schouten & Nelissen do the exact same thing. They do not just sell a training course, first a professional will look at the situation at the organization and comes with an advise about which training courses to attend. (Website Schouten & Nelissen)
Consultancy will be more efficient for management – and communication training courses than for ICT training courses. The customer can, after all, decide for itself whether its employees are capable of using a certain computer program or if they need an ICT training.
Offering education is a different story and more complicated than offering organizational development. The plan was to link training courses to the educations (something like we have done with the organizational development), but that is easier said than done. The problem is that every study is rather broad and ExplainiT does not have enough training courses to assure the participant will learn all core tasks, processes and competences needed to participate in and obtain an exam.
Another problem is that ExplainiT will have to deal with a lot of rules, guidelines, restrictions and interference from the government. They need to hire new people and start some partnerships to be able to reach the quality standards needed. Every supplier of educations should stick to the qualifications files made by the knowledge centres. When we add all those things up, we can conclude that we no longer talk about reshaping the business model, but changing the total culture and business model.

We can conclude that both value propositions are quite different when it comes to implementing and managing them. Organizational development means that ExplainiT will stick close to their current business model. They offer the same service in a different way, in combination with

consultancy. It is possible that this consultancy is the missing link in the current business model. In this case, ExplainiT can maintain their current image. They can still use account managers as the only contact person for customers, which should keep communications lines short. This shortens the time to solve customer problems and improves the flexibility. Customization and the personal touch are important for ExplainiT in the current business model, but should also be maintained in the future business model.
For educations it all comes down to the fact that it is feasible, but you do need partnerships. There are more privately-owned organizations that offer educations, but is will be hard for ExplainiT to start from scratch. They have no experience whatsoever with offering this service. Education really means a change in the business model. Management of ExplainiT does not want that at this moment, however for the long-term it can be a next challenge to grow.

9.4 The possible scenarios

There are multiple possible scenarios for ExplainiT and the services they offer in the future:

- ***Continue with only offering skill training courses.***

This is what ExplainiT does right now. They are quite successful with offering training courses, but the grow possibilities and the turnover will not increase a lot. If the management of ExplainiT does not believe in both organizational development and educations, they should not start those projects. They could lose money when they will not succeed in both services.

- ***Continue offering skill training courses, combined with organizational development.***

With this scenario, the focus will definitely remain on offering training courses. ExplainiT will not take a big risk by offering organizational development, because actually nothing changes in their offer of services (except the added consultancy).

- ***Continue offering skill training courses, combined with educations.***

This is not advisable. The fact that organizational development will be left out makes no sense at all, because it is a very easy and a cheap way to attract more customers and increase the turnover per customer.

- ***Continue offering skill training courses, combined with organizational development and educations.***

It is a feasible scenario, however it is not easy and the business model will not be reshaped but changed. The interference of the government with ExplainiT will increase; the rules, guidelines and restrictions will increase; and the dependency will rise. But, when you offer educations successfully, the turnover per customer will definitely rise.

9.5 Relevance

9.5.1 Scientific relevance

First, the scientific relevance of the study is expanding the knowledge about business models in general. By combining the work of multiple authors, we were able to describe the (current and potential future) business model of ExplainiT and sketched it in the Business Model Canvas.
Second, the scientific relevance of the study is using the Business Model Canvas in a delta analysis to show potential future business models and value propositions. Scientific literature about business model innovation can be found, but there is no literature about comparing a current business model with a future one. This research adds value to the existing theories about business models and business model innovation. It can be a tool for organizations to use for implementing new value propositions to current business models.

9.5.2 Practical relevance

The practical relevance is providing insights into new value propositions that can lead to an increase of the turnover per customer. The processes of implementing organizational development and Intermediate Vocational Education have been clarified. Organizational development is not too hard to implement and doesn't need any further studies. Implementing Intermediate Vocational Education is more complicated and ExplainiT has to decide for itself whether they will offer this service in the future. It could, at least, use some future research to clarify the costs of partnerships and the costs of hiring new people by yourself; and to see if those costs are worth the corresponding future revenues. Also research can be done to see if the turnover of training courses and organizational development will shrink, when ExplainiT changes the business model (by adding educations).

9.6 Limitations

In this study we looked at one case, a so-called "single case study". Limitations hereby are that we cannot make causal conclusions and we cannot say anything about the generality of our findings. ExplainiT makes other choices than other companies would do. The recommendations in this report can scare off organizations, while others are encouraged by the challenge to implement new value propositions.

Another limitation is that there are more theories about business models. Each theory divides the business model in multiple parts, but there is no generally accepted breakdown of a business model. Therefore we took one recent study as the central theory and used other theories to learn more about the business model elements and to link them to business strategy and processes.

A limitation for ExplainiT is that they prefer to stick as close as possible to their current business model. This is logical on the one hand (because they do well with their current service), but also limits the possibilities to increase the turnover per customer. Adding new services or value propositions to the business model will, in most cases, result in a business model change. However, we do not want to exclude educations as a future value proposition, that is up to ExplainiT. Therefore, we come with the recommendations below.

9.7 Recommendations

- Expand the current value proposition with organizational development, in combination with consultancy (for management - and communication training courses) as soon as possible. Make use of unique aspects of the current value proposition to reach competitive advantage: customization and personal touch.
- Decide if you want the business model to change. Expanding the value proposition with educations will mean much interference and inspections from the government. You also need partnerships. If you only want to reshape the business model, then limit the value propositions to skill training courses and organizational development.
- In case you do consider a real business model change, do not start with all six educations, but with just one. In that way you can explore the market and it means less costs and risks.
- Plan the implementation of the educations strategically. Decide in how many years you want to offer this new service. It will cost money and it will be risky, but the results (in terms of turnover per customer) can pay that management challenge back.

10. Reflection

Half a year ago, I started with this research. First I thought that it would not be too hard, but when the time passed by, I almost drowned in the amount of information I had collected. At the end I am satisfied with my report and advice towards ExplainiT, but there are some things I will definitely change in the future.

As so often happened during my years in college, I had a problem with giving boundaries to my report. When I come across information that "could be useful" for my research, I try to use it in my survey. The result is a report with more than 100 pages and sometimes perhaps extensive texts that do not add a lot of value to the report. I have to admit that I have troubles with selecting the right data and that makes such surveys harder than it should be.

Besides that, it is hard to combine scientific literature with practical problems as the one described in this research. The fact is that companies like ExplainiT simply want an answer to their question or a solution to their problem. However, at a university that is not enough. During college you learn to analyse literature and apply it to practical situations. But it remains hard to do this, even after 4 years of college.

Now this reflection gets really depressing. But I must say that I also had a very great time at ExplainiT. I did not know that every single day, 40 hours a week, going to your work would be that "simple" and fun. I was surrounded by nice and helpful colleagues, people that wanted to help me when they could.

At an internship of 6 months, you learn more than you will learn at the university in 1 year. Practical challenges you get to deal with each day, talking to customers (on the phone and face-to-face), meeting new people, conducting interviews and simple things like learning to use Microsoft Outlook for the first time. Those are all examples of things you can hardly learn with books and other theories.

Now that my master study comes to an end, I can focus myself on the labour market. With pride and satisfaction I can watch back at my college years and the internship of the last 6 months. Now the real life begins…

11. List of abbreviations

BBL	BeroepsBegeleidende Leerweg
BM	Business Model
BMC	Business Model Canvas
BOL	BeroepsOpleidende Leerweg
CREBO	Centraal REgister BeroepsOpleidingen
CRM	Customer Relationship Management
CVP	Customer Value Proposition
DMU	Decision Making Unit
DUO	Dienst Uitvoering Onderwijs
ECABO	EConomisch en Administratief BeroepsOnderwijs
ENIC	European Network of Information Centers
EVC	Ervaring Verworven Competenties (Acknowledgement Acquired Competences)
MBO	Middelbaar Beroeps Onderwijs (Intermediate Vocational Education)
NARIC	NAtional Rehabilitation Information Center
PLC	Private Limited Company
RBV	Resource-Based View
ROC	Regionaal Opleidingen Centrum
VAT	Value Added Tax
WEB	Wet Educatie en Beroepsonderwijs
WVA	Wet Vermindering Afdracht

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Appendix A: Training courses of ExplainiT

Management training courses

Project Management

1. Leidinggeven aan projecten basis
2. Leidinggeven aan projecten vervolg
3. Coaching projectmanagers
4. Projectmatig werken
5. Projectmanagement
6. Microsoft Project
7. MS Project voor teamleden
8. Enterprise Project Management voor (project)managers
9. Enterprise Project Management voor teamleden
10. PRINCE2® Foundation
11. PRINCE2® Practitioner

Personal Management

12. Time management
13. Omgaan met stress en werkdruk
14. Omgaan met agressie
15. Omgaan met moeilijke mensen
16. Persoonlijke effectiviteit
17. Onderhandelen en conflicthantering
18. Assertief optreden
19. Effectief vergaderen
20. Snellezen
21. Strategisch beïnvloeden
22. Zelfmanagement
23. Feedback geven
24. Omgaan met feedback

General Management

25. Leidinggeven basis
26. Leidinggeven vervolg
27. Leidinggeven aan professionals
28. Adviesvaardigheden
29. Omgaan met verandering en reorganisatie
30. Omgaan met verandering, de flexplek
31. Effectief samenwerken
32. Politieke gevoeligheid
33. Coachingsvaardigheden
34. Train de trainer
35. Verbeteren van teams
36. Teamdag

Sales

37. Account management
38. Commerciële binnendienst
39. De winnende offerte
40. Persoonlijke verkoop en acquisitie
41. Telefonische verkoop & acquisitie

HRM

42. Selectie- en sollicitatiegesprekken voeren
43. Functionerings- en beoordelingsgesprekken
44. POP gesprekken voeren
45. Verzuimgesprekken voeren
46. Effectief competentiemanagement

Communication training courses

Verbal Communication

47. Communicatieve vaardigheden
48. Presentatievaardigheden
49. Klantgericht telefoneren
50. Klantgericht denken en handelen
51. Klantvriendelijke klachtafhandeling
52. Interculturele samenwerking
53. Lastige gesprekken voeren
54. Gespreksvaardigheden
55. Creatief in communicatie

Written Communication

56. Schriftelijk rapporteren
57. Zakelijk corresponderen
58. Klant- en doelgericht schrijven
59. Burgergericht schrijven
60. Typevaardigheden
61. Notuleren
62. Notuleren met de PC
63. Bedrijfsjournalistiek
64. Schrijven voor internet en intranet
65. Schrijven van raadsvoorstellen
66. Schrijven van beleidsnota's
67. Kort en krachtig formuleren

Languages

68. Nieuwe spelling
69. Correct Nederlands
70. Zakelijk Duits
71. Zakelijk Engels
72. Zakelijk Frans
73. Zakelijk Spaans

Social media

74. Haal alles uit LinkedIn
75. Zakelijk gebruik van Twitter
76. Social media voor bedrijven en instellingen
77. Google AdWords
78. Google Analytics

ICT training courses

Microsoft Office

79. Microsoft Word basis
80. Microsoft Word vervolg
81. Microsoft Excel basis
82. Microsoft Excel vervolg
83. Microsoft Access basis
84. Microsoft Access vervolg
85. Microsoft PowerPoint
86. Microsoft Outlook
87. Microsoft Project
88. Programmeren in Visual Basic for Applications
89. Microsoft Publisher
90. Microsoft Windows
91. Microsoft Internet Explorer
92. Microsoft Visio
93. Microsoft Office migratie

Microsoft SharePoint

94. SharePoint Content Management
95. SharePoint Site Management
96. Configuring and Administering Microsoft SharePoint 2010 (MOC 10174)
97. Micorosft SharePoint 2010, Application Development (MOC 10175)
98. SharePoint Designer
99. Advanced SharePoint Development (CW50064A)

OpenOffice

100. OpenOffice Writer basis
101. OpenOffice Writer vervolg
102. OpenOffice Calc basis
103. OpenOffice Calc vervolg
104. OpenOffice Base
105. OpenOffice Impress
106. OpenOffice migratie

Adobe

107. Adobe Photoshop basis
108. Adobe Photoshop vervolg
109. Adobe Indesign
110. Adobe Acrobat
111. Adobe Flash
112. Adobe Dreamweaver

Appendix B: The secretary

B1: General information about the secretary

Context van de kwalificatie	De secretaresse is werkzaam in arbeidsorganisaties (groot, klein, profit, non-profit) waar sprake is van een secretariaat en een of meer leidinggevenden.
Typerende beroepshouding	Essentiële kennis en vaardigheden voor de secretaresse van de toekomst zijn klantgerichtheid, accuratesse, integriteit, snel kunnen schakelen en een spin in 't web zijn voor de afdeling. Daarnaast wordt het belang van proactief zijn, ondersteunend en meedenkend werken steeds groter. Het gaat om de specifieke vaardigheden als foutloos Nederlands en Engels schrijven, probleemoplossend vermogen hebben en besluitvaardig zijn. Deze vaardigheden zijn vooral van belang bij het helder in beeld krijgen van de wensen, belemmeringen en mogelijkheden van verschillende collega's en klanten. Daarnaast is zij in staat om op adequate wijze om te gaan met vertrouwelijke informatie, zodat de belangen van de eigen afdeling en de privacy van de klanten wordt gewaarborgd. Ook zijn de competenties als vakmanschap, drukbestendigheid, communicatief vermogen, initiatief nemen en plannen en organiseren essentieel voor de uitvoering van de werkzaamheden.
Niveau van de beroepsuitoefening	Niveau 3
Rol en verantwoordelijkheden	De secretaresse zorgt ervoor dat de leidinggevende(n) voortdurend inzicht heeft in de voortgang van de werkzaamheden. Ze informeert en ondersteunt de leidinggevende(n) door het aandragen van informatie voor werkzaamheden die gerelateerd zijn aan haar taken. Ze is verantwoordelijk voor het administratief ordenen en vastleggen van gegevens, voor de organisatie van de diverse activiteiten, voor het reageren op verzoeken en klachten en het opbouwen en onderhouden van contacten met klanten of organisaties. Ze speelt in op wisselende / onverwachte omstandigheden. In veel gevallen maakt zij deel uit van een secretariaat. De secretaresse werkt zelfstandig binnen de gegeven taakstelling vanuit de afdeling en heeft uitvoerende taken. Ze werkt in opdracht maar neemt ook zelf het initiatief. De secretaresse kent de organisatie en het werkgebied, heeft een goed beeld van hoe het zit met verschillen in visies en culturen van medewerkers en relaties en houdt daar rekening mee. De secretaresse levert ondersteuning aan de afdeling en de leidinggevende op het gebied van verzamelen, wegen en verwerken van gegevens, informatievoorziening, planning en organisatie en het maken van afspraken en speelt – binnen grenzen – in op wisselende/onverwachte omstandigheden. Zij is verantwoordelijk voor haar eigen werk en neemt in geval van afwezigheid van de leidinggevende soms zelf initiatieven voor afhandeling van zaken en het geven van informatie en handelt zelfstandig routinematige zaken af. Voor minder routinematige zaken krijgt zij aanwijzingen. In grotere organisaties kan zij deel uitmaken van een secretariaat.
Complexiteit	Het beroep van de secretaresse wordt gekenmerkt door een variatie in en onvoorspelbaarheid van activiteiten. Er wordt een steeds groter beroep gedaan op specialistische kennis en vaardigheden op het gebied van Nederlands, een moderne vreemde taal, verschillende culturen en ict. Ze moet de leidinggevende(n) kunnen informeren en ondersteunen. Daarnaast kan ze initiatieven nemen, ideeën stimuleren en zo nodig verbetervoorstellen doen. Door de technologische ontwikkelingen is het vak complexer geworden en doet de secretaresse dienst als vraagbaak voor de afdeling. Ze moet inzicht en overzicht houden over de informatiestroom. Meer dan vroeger moet de secretaresse beschikken over communicatieve en sociale vaardigheden.
Wettelijke beroepsvereisten	Nee

B2: General information about the management assistant

Context van de kwalificatie	De directiesecretaresse/managementassistent is werkzaam in arbeidsorganisaties (groot, klein, profit, non-profit) waar sprake is van een secretariaat en een directie/managementteam.
Typerende beroepshouding	Essentiële kennis en vaardigheden voor de directiesecretaresses/managementassistenten zijn communicatieve vaardigheden, initiatief nemen en plannen en organiseren. Competenties als klantgerichtheid, accuratesse, integriteit, snel kunnen schakelen en een spin in 't web zijn erg belangrijk. Daarnaast wordt het belang van proactief zijn, ondersteunend en meedenkend werken steeds groter. Het gaat om de specifieke vaardigheden als foutloos Nederlands en Engels schrijven, probleemoplossend vermogen hebben en besluitvaardig zijn. Deze vaardigheden zijn vooral van belang voor het helder in beeld krijgen van de wensen, belemmeringen en mogelijkheden van verschillende collega's en klanten. Daarnaast is zij in staat om op adequate wijze om te gaan met vertrouwelijke informatie, zodat de belangen van de eigen organisatie en de privacy van de klanten wordt gewaarborgd. Competenties als vakmanschap, stressbestendigheid, communicatief vermogen, initiatief nemen en plannen en organiseren zijn essentieel voor de uitvoering van de werkzaamheden.
Niveau van de beroepsuitoefening	Niveau 4
Rol en verantwoordelijkheden	De directiesecretaresse/managementassistent zorgt ervoor dat de directie, de manager of het managementteam voortdurend inzicht heeft in de voortgang van de werkzaamheden. Ze adviseert en ondersteunt de directie, de manager of het managementteam door het aandragen van oplossingen voor problemen die gerelateerd zijn aan haar taken. Ze is verantwoordelijk voor het administratief ordenen en vastleggen van gegevens, voor het opstellen van een administratief plan, voor de coördinatie en de organisatie van de activiteiten, voor het reageren op verzoeken en klachten en het opbouwen en onderhouden van contacten met klanten of organisaties en speelt in op wisselende / onverwachte omstandigheden. Meer dan vroeger moet de directiesecretaresse/managementassistent beschikken over communicatieve en sociale vaardigheden. De directiesecretaresse/managementassistent werkt zelfstandig binnen de gegeven taakstelling en heeft coördinerende taken. Ze moet inzicht in en overzicht over de informatiestromen houden. Door de technologische veranderingen is ze super-user van systemen en pakketten met extra rechten en taken. Deze nieuwe rol stelt haar in staat als vraagbaak op te treden voor specifieke/specialistische (software)toepassingen.
Complexiteit	Het beroep van de directiesecretaresse wordt gekenmerkt door een grote variatie in en onvoorspelbaarheid van activiteiten. Er wordt een steeds groter beroep gedaan op specialistische kennis en vaardigheden op het gebied van Nederlands, een moderne vreemde taal, verschillende culturen en ict. Er wordt eveneens specialistische kennis gevraagd op het werkgebied/de branche, waarin ze werkzaam is. Ze moet de directie, de manager en het managementteam kunnen adviseren en ondersteunen. Daarnaast kan ze initiatieven nemen, ideeën stimuleren en zo nodig verbetervoorstellen doen. Door de technologische ontwikkelingen is het vak complexer geworden. Ze past de standaard computertoepassingen aan haar werkzaamheden en/of die van haar leidinggevenden aan of ontwikkelt nieuwe standaarden. De huidige directiesecretaresse/managementassistent besteedt meer tijd aan organisatorische en coördinerende taken.
Wettelijke beroepsvereisten	Nee

B3: Description of the core tasks

<table>
<tr><th>Kerntaak 1 Voert taken rondom informatiemanagement uit</th><th>Werkprocessen bij kerntaak 1</th></tr>
<tr><td>Beschrijving kerntaak:

De secretaresse, de juridisch secretaresse, de medisch secretaresse of de directiesecretaresse/managementassistent verwerkt, behandelt en bewaakt de e-mails/ post. Ze verkrijgt inzicht in de inhoud en het belang van de ontvangen documenten zodat kan worden ingeschat wie de e-mails/post kan afhandelen. Ze distribueert deze tijdig naar de belanghebbenden. De secretaresse, de juridisch secretaresse, de medisch secretaresse of directiesecretaresse/ managementassistent zorgt voor een reactie op de ontvangen e-mails/post. Ze verwerkt teksten door voldoende informatie te verzamelen om tot een juiste inhoudelijke formulering te komen. Vervolgens bewaakt ze de voortgang en afhandeling van de correspondentie (zoals mailings, brieven, offertes, begeleidend schrijven, e-mails en vakbladen etc.). Ze registreert het product en archiveert het op de juiste wijze.

De secretaresse, de juridisch secretaresse, de medisch secretaresse of de directiesecretaresse/managementassistent voert (telefoon)gesprekken, coördineert de informatiestromen van en naar de directie/manager(s), voorziet de leidinggevende, indien nodig van informatie over het te bespreken onderwerp en handelt zelf de overige (telefoon)gesprekken af. Ze beoordeelt in voorkomende gevallen de urgentie van verzoeken om (telefonisch) contact met de leidinggevende(n).

De secretaresse onderhoudt en actualiseert het (digitale) archief (scant, kopieert, selecteert, codeert, ordent en archiveert).
De juridisch secretaresse, de medisch secretaresse of de directiesecretaresse/ managementassistent legt een nieuw (digitaal) dossier aan, deelt het in volgens voorschrift, registreert documenten en neemt deze op in het (digitale) dossier. Ze zoekt, indien nodig voor de dossiervorming, aanvullende informatie op in de eigen organisatie, bij cliënten of daarvoor in aanmerking komende instanties en voegt deze toe aan het (digitale) dossier. Ze stelt op verzoek van de leidinggevende(n) een dossier samen t.b.v. speciale projecten of bijeenkomsten in binnen- en buitenland.

De secretaresse, de juridisch secretaresse, de medisch secretaresse of de directiesecretaresse/managementassistent investeert actief in het opbouwen van goede werk-/klantrelaties. Ze onderhoudt contact met het relatienetwerk van directie/manager(s) en actualiseert de gegevens door deze tijdig te muteren. Ze legt de gegevens van organisaties en personen vast in een relationele database en geeft aan hoe relaties (contactpersoon, klant, leverancier etc.) met elkaar verbonden zijn.

D e secretaresse of de directiesecretaresse/managementassistent verwerkt verschillende soorten persoonlijke en niet-persoonlijke gegevens van en over personeelsleden (aan/afwezigheidsregistratie, verlofdagen, ziek- en herstelmeldingen, functionerings- en beoordelingsgesprekken, mutaties personeelsleden) in een systeem voor gegevensbeheer en maakt periodiek of op verzoek rapporten en/of overzichten uit het systeem t.b.v. de directie/het management en/of input (tekst en informatie) voor het (sociaal) jaarverslag. In voorkomende</td><td>
<table>
<tr><td>1.1</td><td>Zorgt voor de schriftelijke informatie-uitwisseling</td></tr>
<tr><td>1.2</td><td>Zorgt voor de mondelinge (telefonische) informatie-uitwisseling</td></tr>
<tr><td>1.3</td><td>Onderhoudt en actualiseert het (digitale) archief</td></tr>
<tr><td>1.4</td><td>Verzorgt de dossiervorming en het dossierbeheer</td></tr>
<tr><td>1.5</td><td>Onderhoudt het relatienetwerk</td></tr>
<tr><td>1.6</td><td>Voert administratieve taken uit</td></tr>
</table>
</td></tr>
</table>

gevallen levert ze tekst aan voor de website of intranet en/of ondersteunt bij het gegevensonderhoud en de content hiervan.	
Toelichting: Nederlands en een moderne vreemde taal Bij de uitvoering van de werkzaamheden onder deze kerntaak gebruiken de secretaresse, de juridisch secretaresse, de medisch secretaresse en de directiesecretaresse/ managmentassistent de Nederlandse taal en een moderne vreemde taal. Er zijn verschillen te constateren bij de uitvoering van deze kerntaak door de secretaresse enerzijds en de directiesecretaresse/ managementassistent anderzijds. Voor de kwalificaties op niveau 4 betreft het: -een grotere complexiteit van de teksten op zich en de werkzaamheden bij de verwerking ervan -een grotere verantwoordelijkheid voor de uitvoering -een grotere zelfstandigheid en meer eigen initiatieven nemen -een groter en sneller verkregen inzicht in de werkzaamheden en de bijbehorende processen - in voorkomende gevallen coördineert de directiesecretaresse/managementassistent, de juridische en medisch secretaresse een aantal werkzaamheden van het secretariaat.	

Kerntaak 2 Voert taken rondom planning en organisatie uit	Werkprocessen bij kerntaak 2
Beschrijving kerntaak: De secretaresse, de juridisch secretaresse, de medisch secretaresse of de directiesecretaresse/managementassistent regelt en noteert afspraken van en voor de directie/manager(s), van zowel interne als externe contacten. Ze synchroniseert de agenda's, stemt agenda's onderling af, bewaakt de afspraken en verzet ze indien nodig. Ze herinnert de directie/manager(s) op gezette tijden aan de to-do's. Indien nodig bereidt ze afspraken voor en zorgt ook voor de opvolging ervan. Ze beheert de agenda van de directie/manager en haar eigen agenda. De juridisch secretaresse of de medisch secretaresse maakt bij het vastleggen van bijeenkomsten gebruik van een zaalreserveringssysteem. Ze voert de gegevens in of laat de gegevens invoeren, ze maakt een helder overzicht van de gegevens van de zaal, tijdstip, aanvang, duur en frequentie van de bijeenkomsten, de klantnaam, de contactpersoon, opmerkingen, of het een interne of externe bijeenkomst betreft en welke extra's (catering, beamer, laptop) zijn geboekt. Als de bijeenkomst een conference call of videoconference betreft, vraagt ze deze aan (bij een telefoniebedrijf). Vervolgens regelt ze de faciliteiten en organiseert de conference call of videoconference. De secretaresse of de directiesecretaresse/managementassistent informeert naar de doelstelling van de bijeenkomst (internationale) bijeenkomsten zoals vergaderingen besprekingen, congressen, seminars, cursussen, trainingen). Bij de organisatie van een bijeenkomst hanteert ze een checklist. Ze selecteert een interne of een externe locatie, houdt rekening met de gevoeligheid van het onderwerp, het totaal aantal genodigden en of er speciale vereisten zijn met betrekking tot deze bijeenkomst. Ze informeert naar de kosten van de zaal, mogelijkheden voor zaalopstelling, de catering en elektronische voorzieningen etc. Ze overlegt met de directie/manager(s) over de locatie en reserveert deze in een zaalreseveringssysteem of hanteert een procedure hiervoor. Ze voert de gegevens in of laat deze invoeren. In overleg bespreekt ze de voorgestelde agenda, de te besteden tijd per onderwerp, en de persoon die elk onderwerp zal leiden. Ze verstuurt tijdig de uitnodiging met daarin alle informatie over de bijeenkomst. Ze verzendt indien mogelijk een (digitale) versie van het voorbereide dossier, zodat deelnemers zich kunnen voorbereiden. Kort voor aanvang van de bijeenkomst checkt ze of alles in orde is. De secretaresse, de juridisch secretaresse, de medisch secretaresse of de directiesecretaresse/managementassistent gaat van te voren na of een uitgebreid of beknopt verslag nodig is of kan worden volstaan met een besluitenlijst. Ze leest ter voorbereiding op de vergadering de stukken door. Tijdens de vergadering maakt ze aantekeningen of ze notuleert m.b.v. een laptop en opnameapparatuur. Na de vergadering maakt ze op basis van de aantekeningen een uitgebreid of beknopt verslag of een besluitenlijst. De secretaresse, de juridisch secretaresse, de medisch secretaresse of de directiesecretaresse/managementassistent ontvangt (internationale) bezoekers/relaties, informeert in voorkomende gevallen naar het doel van het bezoek en voorziet hen van informatie. De bezoekers worden ingeschreven en de secretaresse, de juridisch secretaresse, de medisch secretaresse of directiesecretaresse/managementassistent verwijst of begeleidt de bezoekers naar de juiste persoon/personen.	2.1 Beheert de agenda 2.2 Regelt vergaderruimten en faciliteiten 2.3 Organiseert bijeenkomsten 2.4 Maakt verslag en handelt zaken af 2.5 Ontvangt bezoekers 2.6 Bereidt het spreekuur voor, ontvangt patiënten, maakt vervolgafspraken en handelt zaken af 2.7 Regelt reizen en accommodaties 2.8 Beheert kleine budgetten en handelt financiële zaken af 2.9 Handelt facturen en declaraties af

De medisch secretaresse bereidt het spreekuur voor en maakt (telefonisch) (vervolg)afspraken met patiënten voor het spreekuur in het patiëntenregistratiesysteem en zoekt voor het spreekuur begint de statussen, dossiers en foto's op, beoordeelt of nog aanvullende (vertrouwelijke) informatie en/of uitslagen elders verkregen moeten worden en voegt deze gegevens in voorkomende gevallen toe aan het patiëntendossier. Ze ontvangt patiënten uit verschillende culturen, controleert waarvoor de patiënt komt, neemt de documenten in ontvangst, zoals een verwijzing, brief, ziektekostenpas, verwerkt de gegevens in het systeem in verband met financieel administratieve afhandeling van zaken, voorziet hen van (medische) informatie en verwijst of begeleidt hen naar de juiste arts of afdeling. Daarnaast voorziet ze de spreekkamers van onderzoeksmaterialen, controleert of de apparatuur werkt en legt formulieren klaar ten behoeve van het spreekuur. De secretaresse, de juridisch secretaresse, de medisch secretaresse of directiesecretaresse/managementassistent regelt binnen- en buitenlandse zakenreizen en hotelaccommodatie. Ze informeert naar de wensen voor de wijze van vervoer en verblijfsmogelijkheid en checkt de beschikbaarheid gebaseerd op deze wensen. Daarnaast regelt ze de kantoorbagage. De directiesecretaresse/managementassistent beheert een aantal kleine budgetten van de organisatie of afdeling (receptie bij jubilea of vertrekkende collega's, cadeaus bij huwelijken en geboortes.) Ze beheert een klein budget waaruit de onkosten van vergaderingen en bijeenkomsten worden bekostigd (bijv. het jaarlijkse afdelingsuitje). Daarnaast beheert ze een klein budget voor het bijhouden van de kantoorvoorraad en het inkopen van goederen en diensten. Ze onderhandelt over de prijs van goederen en diensten. Ze controleert, verwerkt en betaalt de facturen die onder haar kleine budgetten vallen. Daarnaast verzamelt en ordent ze (financiële) gegevens (urenregistratie, onkostendeclaraties van interne en externe projectmedewerkers, reisdeclaraties, offertes, nota's, facturen) en verwerkt deze in een administratief systeem ter voorbereiding op de verwerking ervan door de financiële en/of projectadminsitratie. In voorkomende gevallen verricht ze werkzaamheden (offertes opvragen, overleg voeren over inhoud en financiële aspecten van contracten) rondom contracten, tarieven en looptijd contracten. De secretaresse, de juridisch secretaresse of de medisch secretaresse verzamelt en ordent financiële gegevens (onkostendeclaraties van medewerkers, reisdeclaraties, offertes, nota's, facturen) en verwerkt ze in een administratief systeem ter voorbereiding op de verwerking ervan door de financiële en/of projectadministratie. Toelichting: **Toelichting** Nederlands en een moderne vreemde taal Bij de uitvoering van de werkzaamheden onder deze kerntaak gebruiken de secretaresse, de juridisch secretaresse, de medisch secretaresse en de directiesecretaresse/ managmentassistent de Nederlandse taal en een moderne vreemde taal.	

Er zijn verschillen te constateren bij de uitvoering van deze kerntaak door de secretaresse enerzijds en de directiesecretaresse/ managementassistent anderzijds.	
Voor de kwalificaties op niveau 4 betreft het: –een grotere complexiteit van de teksten op zich en de werkzaamheden bij de verwerking ervan –een grotere verantwoordelijkheid voor de uitvoering –een grotere zelfstandigheid en meer eigen initiatieven nemen –een groter en sneller verkregen inzicht in de werkzaamheden en de bijbehorende processen –in voorkomende gevallen coördineert de directiesecretaresse/managementassistent, de juridisch en medisch secretaresse een aantal werkzaamheden van het secretariaat.	

B4: Process-competence-matrix

The boxes within the matrix tell us which competence belongs to which qualification:

Secretary: 

Legal secretary: 

Medical secretary: 

Management assistant: 

When there is no box in the table, it means that the competence belongs to none of the qualifications.

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Proces-competentie-matrix Kerntaak 1: Voert taken rondom informatiemanagement uit

Kerntaak 1 Voert taken rondom informatiemanagement uit		Competenties																								
		A Beslissen en activiteiten initiëren	B Aansturen	C Begeleiden	D Aandacht en begrip tonen	E Samenwerken en overleggen	F Ethisch en integer handelen	G Relaties bouwen en netwerken	H Overtuigen en beïnvloeden	I Presenteren	J Formuleren en rapporteren	K Vakdeskundigheid toepassen	L Materialen en middelen inzetten	M Analyseren	N Onderzoeken	O Creëren en innoveren	P Leren	Q Plannen en organiseren	R Op de behoeften en verwachtingen van de "klant" richten	S Kwaliteit leveren	T Instructies en procedures opvolgen	U Omgaan met verandering en aanpassen	V Met druk en tegenslag omgaan	W Gedrevenheid en ambitie tonen	X Ondernemend en commercieel handelen	Y Bedrijfsmatig handelen
Werkprocessen																										
1.1	Zorgt voor de schriftelijke informatie-uitwisseling	■				■	■				■	■		■				■			■		■			
1.2	Zorgt voor de mondelinge (telefonische) informatie-uitwisseling	■			■	■	■	■			■								■				■			
1.3	Onderhoudt en actualiseert het (digitale) archief						■					■									■					
1.4	Verzorgt de dossiervorming en het dossierbeheer						■				■	■		■							■					
1.5	Onderhoudt het relatienetwerk				■	■		■				■							■		■					
1.6	Voert administratieve taken uit						■				■			■							■					

Proces-competentie-matrix Kerntaak 2: Voert taken rondom planning en organisatie uit

Kerntaak 2 Voert taken rondom planning en organisatie uit		A Beslissen en activiteiten initiëren	B Aansturen	C Begeleiden	D Aandacht en begrip tonen	E Samenwerken en overleggen	F Ethisch en integer handelen	G Relaties bouwen en netwerken	H Overtuigen en beïnvloeden	I Presenteren	J Formuleren en rapporteren	K Vakdeskundigheid toepassen	L Materialen en middelen inzetten	M Analyseren	N Onderzoeken	O Creëren en innoveren	P Leren	Q Plannen en organiseren	R Op de behoeften en verwachtingen van de "klant" richten	S Kwaliteit leveren	T Instructies en procedures opvolgen	U Omgaan met verandering en aanpassen	V Met druk en tegenslag omgaan	W Gedrevenheid en ambitie tonen	X Ondernemend en commercieel handelen	Y Bedrijfsmatig handelen
Werkprocessen																										
2.1	Beheert de agenda					■■/■■		■■/■■				■■/■■						■■/■■	■■/■■		■■/■■		■■/■■			
2.2	Regelt vergaderruimten en faciliteiten	□■/■□				□■/■□						□■/■□						□■/■□								□■/■□
2.3	Organiseert bijeenkomsten	■□/□■				■□/□■				■□/□■	■□/□■	■□/□■						■□/□■	□□/□■		■□/□■		■□/□■			■□/□■
2.4	Maakt verslag en handelt zaken af						■■/■■				■■/■■	■■/■■						■■/■■			■■/■■		■■/■■			
2.5	Ontvangt bezoekers				■■/■■		■■/■■	■■/■■		■■/■■									■■/■■		■■/■■		■■/■■			
2.6	Bereidt het spreekuur voor, ontvangt patiënten, maakt vervolgafspraken en handelt zaken af				□□/■□		□□/■□	□□/■□		□□/■□		□□/■□						□□/■□	□□/■□		□□/■□		□□/■□			
2.7	Regelt reizen en accommodaties	■■/■■				■■/■■												■■/■■	■■/■■		■■/■■		■■/■■			■■/■■
2.8	Beheert kleine budgetten en handelt financiële zaken af						□□/□■														□□/□■					□□/□■
2.9	Handelt facturen en declaraties af						■■/■□												□■/■□		■■/■□					■■/■□

B5: Possible education programs for the secretary professions

Below is a possible education program for the secretary and the management assistant. These programs have been set up by looking at competitors and see how they offer educations. It is not the final program of ExplainiT, but an example of how the organization can offer their studies in the future. The websites of two big suppliers of educations (Scheidegger and NCOI) are used. The study programs are a combination of the study programs of those two successful organizations. Again, it is just an example and overview where ExplainiT can learn from.

Secretary level 3

Duration

1 year.

Design

The participant develops the knowledge and skills needed as a secretary, in a practical and challenging study.

Target group

This education has been developed for those people (older than 18 years) that want to achieve an official diploma as professional secretary.

Practice program

The practice program consists of certain practical assignments, of which the participants should make a report. The program will be finished with an end conversation. Results will be secured in a portfolio.

Day- and evening education

The day education will take 1 year and consists of 12 meetings from 09.30 AM till 16.30.
The evening education will take 1 year and consists of 24 meetings from 18.00 PM till 21.00.

Study program

The education consists of 4 modules of 6 meetings each:

Business correspondence

- Correct Dutch.
- Different kinds of correspondence.
- Business writing and the business letter.
- Formulating and drafting texts.
- Format and corporate design.
- Memos and notes.
- Mail friendliness.
- Distributing texts and information.

Communication

- Conversation techniques.
- Formulating understandable.
- Effective conversations.
- Listening skills.
- Deliberating and having meetings.
- Giving and receiving feedback.
- Phone friendliness.

- Communication pitfalls.

Planning and organizing
- Core concepts: planning and organizing.
- Time management.
- Organizing meetings and events.
- Customer-based organizing and planning.
- Working with scenarios.
- The selection of a location and planning.
- International gatherings and traveling.

Support and information provision
- The role of support in the provision of information.
- Information in organizations.
- The Internet, reference works and the archive.
- Selecting relevant information.
- Structuring relevant information.
- Organizing information streams.
- Mail processing, archiving and files.
- Providing and managing information.
- Dealing with sensitive information.
- Keeping and saving information.

Diploma
The education consists out of 4 modules of which 2 will be completed with an practice-based assignment and 2 with a written exam. When the result of the assignments, exams and practice program is sufficient, the participant receives the diploma “MBO Secretaresse niveau 3”, as registered in the Dutch “Centraal Register Beroepsopleidingen”. (Website NCOI)

Estimated costs

Registration fee:	€ 100
The course:	€ 2,500 (or 4 x € 675)
Study materials:	€ 600
Exam costs:	€ 150 x 4 (for each module)
Practice program:	€ 750
Total costs:	€ 4,550

Management assistant level 4

Duration
2 years.

Design
This education is very practice-based. It is special designed for people that want to combine learning and working. The participant learns what is necessary to fulfil the function of management assistant independently. This education consists out of practice-based modules to develop important skills as a management assistant. Besides that, there is an extensive practice program, where the learned skills will be applied in practice.

Target group
This education has been developed for secretaries and future management assistants (older than 18 years) that want to grow towards a full-fledged management assistant.

Practice program
The practice program consists of practical assignments, of which the participants makes a report. During meetings, the participant develops his or her skills. The results will be secured in a portfolio.

Day- and evening education
The day education will take 2 years and consists of 24 meetings from 09.30 AM till 16.30.
The evening education will take 2 years and consists of 48 meetings from 18.00 PM till 21.00.

Study program
The education consists of 8 modules of 6 meetings each:

Business correspondence
- Different kinds of correspondence.
- Preparing correspondence.
- Formulating and drafting texts.
- Format and corporate design.
- Communication means.
- Distributing texts and information.

Communication
- Conversation techniques.
- Listening, summarizing, questioning.
- Deliberating and having meetings.
- Giving and receiving feedback.
- Phone and mail friendliness.
- Communication pitfalls.

Correct Dutch
- Correct written Dutch.
- Sentence structure and formulating.
- Punctuation.
- Writing for different media.
- Target group based writing.
- Often-made mistakes.

Management skills
- Situational directing.
- Instructing.
- Delegating.
- Coordinating activities.
- Staff policy.
- Reviews of functioning.

Personal effectiveness
- Time management.
- Dealing with workload.

- Personal presentation.
- Core qualities and points for development.
- Customer directed confidence.
- Proactive acting and deciding.

Planning and organizing

- Core concepts: planning and organizing.
- Planning your own work.
- Meetings and events.
- Customer-based organizing and planning.
- Working with scenarios.
- The selection of a location and planning.
- International gatherings and traveling.
- Tips and tools for planning and organizing.

Project-based working

- Project organizing.
- Purposeful and systematic working.
- Planning and organizing.
- Guarding running times and deadlines.
- Cost awareness.
- Finishing a project.

Support and information provision

- The role of support in the provision of information.
- Information in organizations.
- The Internet, reference works and the archive.
- Selecting relevant information.
- Organizing information streams.
- Mail processing, archiving and files.
- Providing information.
- Managing information.
- Dealing with sensitive information.
- Keeping and saving information.

Diploma

The exams are a combination of practice-based written exams, practice assignments and the practice program. The education will be finished with the diploma “MBO Directiesecretaresse niveau 4”, as registered in the Dutch “Centraal Register Beroepsopleidingen”. (Website NCOI)

Estimated costs

Registration fee:	€ 100
The course:	€ 3,000 (or 6 x € 550)
Study materials:	€ 1,000
Exam costs:	€ 150 x 8 (for each module)
Practice program:	€ 1,000
Total costs:	€ 5,300

Appendix C: The salesman

C1: General information about the office salesman

Context van de kwalificatie	De commercieel medewerker binnendienst werkt zowel in het midden- en kleinbedrijf (MKB) als in het grootbedrijf en werkt vanuit kantoor. De medewerker werkt meestal op de afdeling Verkoop. De commercieel medewerker binnendienst heeft met name telefonisch contact met klanten en vervult vanuit die context vaak een vraagbaakfunctie voor klant en collega's. Naast de verkooptaken heeft hij ook een belangrijke rol in de administratieve afhandeling van het offerte- en ordertraject.
Typerende beroepshouding	De commercieel medewerker binnendienst heeft het talent om snel te kunnen wisselen tussen werkzaamheden en daarbij geordend en nauwkeurig te blijven werken. Hij heeft gevoel voor interne bedrijfsprocessen en kan zich verplaatsen in collega's. De commercieel medewerker binnendienst is sociaal vaardig en commercieel ingesteld en heeft oog voor service (aan zowel interne als externe klanten). Hij kan zich inleven in de klant aan de telefoon en stelt zich flexibel op richting de klant.
Niveau van de beroepsuitoefening	Niveau 3
Rol en verantwoordelijkheden	De commercieel medewerker binnendienst heeft een uitvoerende rol. Hij is verantwoordelijk voor zijn eigen takenpakket en voert de werkzaamheden zelfstandig -binnen een meestal open opdracht- uit. De commercieel medewerker binnendienst heeft een 'schakelfunctie' tussen de interne organisatie (o.a. de afdelingen inkoop en logistiek), de buitendienst en de klant. De medewerker heeft ook een ondersteunende functie ten opzichte van de buitendienst. Hij legt verantwoording af aan zijn direct leidinggevende.
Complexiteit	De commercieel medewerker binnendienst combineert organisatieafhankelijke standaardprocedures. Bij afwijkingen op het gebied van middelen, werkprocessen en omgeving is hij in staat passende oplossingen te bedenken. De complexiteit wordt beïnvloed door het feit dat: hij met name op afstand (telefonisch, fax, ICT-toepassingen etc.) contact heeft en zonder de klant 'echt te kennen of te zien' makkelijk moet communiceren, een relatie op moet bouwen en goed over moet komen aan de telefoon. hij veel klantcontact heeft waarvan niet van tevoren duidelijk is hoe het zal verlopen: (nog onbekende, potentiële) klanten reageren op hun eigen wijze. Hij moet contact met (potentiële) klanten durven opnemen zonder van te voren te weten of deze geïnteresseerd zijn of tijd hebben. hij door zijn schakelfunctie met veel verschillende mensen (intern en extern) moet afstemmen en afspraken moet maken en ook bij afwijkingen (producten niet op voorraad, bestellingen die niet binnenkomen) gepaste actie moet ondernemen en de uitkomst van deze actie moet communiceren en volgen. hij zijn werkzaamheden nauwkeurig moet uitvoeren omdat het afbreukrisico van (administratieve) fouten en onduidelijke afspraken groot is. Voor het beroep zijn specialistische kennis en vaardigheden m.b.t. commercie, sales en/of customer service noodzakelijk

C2: General information about the traveling salesman

Context van de kwalificatie	De commercieel medewerker buitendienst werkt zowel in het midden- en kleinbedrijf (MKB) als in het grootbedrijf. Hij is veelal onderweg naar of op bezoek bij klanten en dus zelfstandig op pad. De klantcontactmomenten die de commercieel medewerker buitendienst heeft, vinden voornamelijk face-to-face plaats. De commercieel medewerker buitendienst werkt veelal zelfstandig maar ook samen met de commercieel medewerker binnendienst. Ze werken vaak samen in een team aan het behalen van de targets (uit het verkoopplan). Tijdens het uitvoeren van zijn verkoop- en acquisitietaken krijgt de commercieel medewerker buitendienst (administratieve, voorbereidende en inhoudelijke) ondersteuning van de commercieel medewerker binnendienst.
Typerende beroepshouding	De commercieel medewerker buitendienst legt makkelijk contact en onderhoudt contacten met mensen, heeft oog voor en kan zich goed inleven in de situatie/problematiek van de klant, kan goed luisteren en kan makkelijk op verschillende situaties inspelen. Hij is het gezicht van het bedrijf naar de klanten toe. Hij is zelfstandig, 'stapt gemakkelijk op dingen af', is commercieel ingesteld en ondernemend. Hij ziet commerciële kansen in de markt, ook op langere termijn, en zet deze om naar acties.
Niveau van de beroepsuitoefening	Niveau 3
Rol en verantwoordelijkheden	De commercieel medewerker buitendienst heeft een uitvoerende rol. Hij is verantwoordelijk voor zijn eigen takenpakket en voert zijn werkzaamheden zelfstandig en op eigen initiatief uit. Binnen de gestelde kaders heeft hij een grote bewegingsvrijheid. De verkoopdoelstellingen zijn taakstellend en hij legt hierover verantwoording af aan zijn leidinggevende.
Complexiteit	De commercieel medewerker buitendienst combineert organisatieafhankelijke standaardprocedures. Bij afwijkingen op het gebied van middelen, werkprocessen en omgeving is hij in staat passende oplossingen te bedenken. De complexiteit wordt onder andere beïnvloed door het feit dat: de buitendienst medewerker niet vanuit een eigen omgeving werkt: zijn 'werkveld' is bij de klant. Hij werkt 'op vreemd grondgebied' en moet zich snel de cultuur van de klant eigen kunnen maken ('op het netvlies krijgen') en hierop inspelen. Daarnaast moet hij altijd direct (zonder overleg, even iets opzoeken, etc.) kunnen inspringen op reacties van de klant. hij altijd representatief moet zijn. Hij is het gezicht van het bedrijf naar de klanten toe en heeft daarmee een groot afbreukrisico. hij voornamelijk face-to-face contact heeft met de klant en dus ook te maken heeft met non-verbale communicatieaspecten en de invloed van zijn persoonlijkheid/uitstraling. hij veel klantcontact heeft waarvan niet van de voren duidelijk is hoe het zal verlopen: (nog onbekende, potentiële) klanten reageren op hun eigen wijze. Hij moet contact met (potentiële) klanten durven opnemen zonder van te voren te weten of deze geïnteresseerd zijn of tijd hebben. hij veel overtuigingskracht moet hebben, maar zich tegelijkertijd moet houden aan zijn onderhandelingsruimte, de marges en de praktische uitvoerbaarheid binnen zijn organisatie. Voor het beroep zijn specialistische kennis en vaardigheden m.b.t. commercie, sales en/of customer service noodzakelijk.
Wettelijke beroepsvereisten	Nee

C3: General information about the contact centre employee

Context van de kwalificatie	De contactcenter medewerker werkt binnen zowel de profit als de non-profitsector vanuit een facilitair of inhouse contactcenter, en heeft een kantoorfunctie. De medewerker werkt regelmatig buiten kantoortijden c.q. 's avonds en in het weekend.
Typerende beroepshouding	De contactcenter medewerker is klantgericht en klantvriendelijk, proactief, dienstverlenend, sociaal vaardig, communicatief, servicegericht en flexibel. Verder is de contactcenter medewerker gedisciplineerd, stressbestendig en accuraat, heeft hij empathisch vermogen, toont hij sensitiviteit en is hij kritisch ten opzichte van zichzelf. De contactcenter medewerker benadert zijn functie vanuit een commercieel oogpunt, hij heeft doorzettingsvermogen en het vermogen om kritiek en tegenslagen te kunnen incasseren.
Niveau van de beroepsuitoefening	Niveau 3
Rol en verantwoordelijkheden	De contactcenter medewerker heeft een uitvoerende rol. Hij is verantwoordelijk voor zijn eigen takenpakket en voert binnen deze taak de werkzaamheden zelfstandig (soms op eigen initiatief) uit. De medewerker draagt de verantwoordelijkheid om klantvriendelijke en klantgerichte gesprekken (mondeling/schriftelijk/digitaal) te voeren en daarbij het organisatiebelang niet uit het oog te verliezen. De medewerker heeft soms een ondersteunende functie ten opzichte van de buitendienst. Hij maakt en verzet bijvoorbeeld bezoekafspraken en belt klanten terug om hen van de gewenste informatie te voorzien. De contactcenter medewerker legt verantwoording af aan zijn leidinggevende.
Complexiteit	De contactcenter medewerker combineert organisatieafhankelijke standaardprocedures. Bij afwijkingen op het gebied van middelen, werkprocessen en omgeving is hij in staat passende oplossingen te bedenken. De complexiteit wordt onder andere beïnvloed door het feit dat: hij met name telefonisch contact heeft en zonder de klant 'echt te kennen of te zien' goed moet luisteren, makkelijk moet communiceren, een relatie op moet bouwen en goed over moet komen aan de telefoon. hij veel klantcontact heeft waarvan niet van de voren duidelijk is hoe het zal verlopen: (nog onbekende, potentiële) klanten reageren op hun eigen wijze. Hij moet contact met (potentiële) klanten durven opnemen zonder van te voren te weten of deze geïnteresseerd zijn of tijd hebben. Hij heeft met een hoog afbreukrisico bij klantrelaties te maken. zijn werkzaamheden door -met name- systemen sterk gestuurd worden. Hij moet in staat zijn om met de binnen contactcenters veelgehanteerde, al dan niet beïnvloedbare, stuurcriteria te werken en om te gaan met mogelijke scriptgebondenheid. hij veel van zijn werkzaamheden, ondersteund door het computertelefoonsysteem, gelijktijdig moet uitvoeren: de medewerker moet multi-tasking zijn. Voor de uitoefening van het beroep zijn specialistische kennis en vaardigheden m.b.t. sales en customer service noodzakelijk.
Wettelijke beroepsvereisten	Nee
Branche vereisten	Ja, Starterscertificaat Facilitaire callcenters. (http://www.wgcc.nl/dossiers opleiding&scholing) (Bron: http://www.wgcc.nl/dossiers_starterscertificaat.html)

C4: General information about the (junior) account manager

Context van de kwalificatie	De (junior) accountmanager werkt zowel in het midden- en kleinbedrijf (MKB) als in het grootbedrijf. Hij is veelal onderweg naar of op bezoek bij klanten/accounts en dus zelfstandig op pad. De (junior) accountmanager bedient met het accountteam een aantal accounts. Met deze accounts houdt hij intensief contact. Hij denkt in verkooptrajecten met de account mee over totaaloplossingen en probeert zoveel mogelijk maatwerk te leveren. Het verkooptraject van de (junior) accountmanager duurt veelal lang door de complexiteit van het product/de dienst en/of doordat de 'decision making unit' (DMU) beïnvloed moet worden.
Typerende beroepshouding	De (junior) accountmanager kan gemakkelijk contact leggen en onderhouden, klanten/vraagstukken vanuit een commercieel oogpunt benaderen, goed luisteren, zich inleven in de wensen van de account, vraagstukken analyseren, problemen oplossen, representatief optreden, onderhandelen, potentiële klanten enthousiast maken voor een product en/of dienst, zich mondeling en schriftelijk goed uitdrukken en zorgvuldig werken. Bovendien is hij integer en handelt hij in overeenstemming met in de maatschappij geldende ethische maatstaven.
Niveau van de beroepsuitoefening	Niveau 4
Rol en verantwoordelijkheden	De (junior) accountmanager heeft een uitvoerende en initiërende rol. In het kader van deze laatste rol doet hij voorstellen voor het marketing- en verkoopplan en voor de accountplannen. De (junior) accountmanager heeft verder een 'schakelfunctie' tussen de klant/account en de interne organisatie (o.a. de commerciële binnendienst). Hij is verantwoordelijk voor zijn eigen takenpakket en mede verantwoordelijk voor het takenpakket van het accountteam waartoe hij behoort. Hij voert zijn werkzaamheden op basis van (beleids)plannen zelfstandig en op eigen initiatief uit. Hij legt verantwoording af aan zijn leidinggevende.
Complexiteit	De (junior) accountmanager kan meestal niet volstaan met het werken volgens organisatieafhankelijke standaardprocedures. Standaarden moeten meestal worden aangepast; dit geschiedt naar eigen inzicht. Bij afwijkingen op het gebied van middelen, werkprocessen en omgeving is hij in staat passende oplossingen te bedenken. De complexiteit wordt onder andere beïnvloed door het feit dat: het om klanten gaat die belangrijk zijn voor de organisatie (A en B klanten). het om complexe producten/diensten/oplossingen gaat die de medewerker onder de aandacht moet brengen. het verkooptraject maanden kan duren. de (junior) accountmanager verantwoordelijk is voor (de binding) van meerdere accounts. de (junior) accountmanager altijd binnen een team werkt en daarom goed moet afstemmen met zijn collega's. Voor de uitoefening van het beroep zijn specialistische kennis en vaardigheden m.b.t. commercie, sales en/of customer service en bedrijfsvoering noodzakelijk.
Wettelijke beroepsvereisten	Nee

C5: Description of the core tasks

Kerntaak 1 Onderzoekt de markt en maakt plannen	**Werkprocessen bij kerntaak 1**
Beschrijving kerntaak: De commercieel medewerker verzamelt gericht relevante gegevens c.q. informatie over klanten en producten voor het oplossen van (commerciële) vraagstukken. Hij voert in opdracht deskresearch en enquêtes uit en houdt assortimentsdossiers bij. Hij raadpleegt nieuws- en marktinformatiebronnen om altijd up-to-date te zijn. Hij analyseert de informatie en verwerkt deze d.m.v. overzichten, tabellen, grafieken e.d. tot verkoop- c.q. managementinformatie. Hij signaleert in klantcontacten relevante klant-, product- en/of marktontwikkelingen en legt de informatie vast in het systeem en/of rapporteert/communiceert deze rechtstreeks aan de leidinggevende en relevante collega's. De contactcenter medewerker signaleert in klantcontacten informatie over klanten en producten. De (junior) accountmanager zoekt naar strategische informatie. Daartoe voert hij marktverkenningen en fieldresearch uit en brengt hij de afzetmarkt en het 'commerciële landschap' zo compleet mogelijk in kaart. De (junior) accountmanager doet voorstellen voor verkoopactiviteiten, die zijn gericht op de eigen accounts voor de middellange termijn (kwartaal of half jaar) en voor (organisatiebrede) verkoopacties. Hij doet dit op basis van zijn analyse van klant-, product- en marktinformatie. In zijn voorstellen schetst hij bovendien de afzetmarkt, de markt- en brancheontwikkelingen en mogelijke concurrenten en gaat hij in op de financiële aspecten van het voorstel. Bovendien schetst hij de ontwikkelingen bij de accounts. Op verzoek licht hij de voorstellen toe. De commercieel medewerker analyseert (in opdracht) de verzamelde informatie t.b.v. zijn activiteitenplan. Hij stelt samen met het team een plan van aanpak voor zijn klantengroep op. Hij plant daartoe de/zijn verkoopactiviteiten voor de korte termijn en stelt zijn activiteitenplan op. Bovendien plant hij, in opdracht, marketingacties in en bedenkt hij, in opdracht, een concrete invulling van de verkoopacties. De (junior) accountmanager voert onderzoek uit naar bestaande en nieuwe accounts. Hij verzamelt bedrijfseconomische gegevens over de (potentiële) account en rekent deze informatie door. Op basis van deze informatie brengt hij voor de organisatie de (financiële) kansen en risico's van de account in kaart. Wanneer de account van waarde kan zijn voor de organisatie, voert hij (kwalitatief) onderzoek uit om een volledig beeld van de account te krijgen. Hij verzamelt informatie over onder andere de visie en strategie van de account, de DMU, de organisatie van de bedrijfsprocessen, het inkoopbeleid, de klanten en leveranciers van de account en de organisatiecultuur. Met behulp van een SWOT-analyse brengt hij de (waarde van de) account nog beter in kaart en hij verwerkt de verkregen accountinformatie uiteindelijk in een accountprofiel. Als laatste stelt hij voor zijn leidinggevende en/of accountteam een advies op met betrekking tot de account. De (junior) accountmanager stelt op basis van de klant-, product- en/of marktinformatie en de accountanalyse accountplannen op met betrekking tot zijn accounts. In het accountplan beschrijft hij op welke wijze hij (de DMU van) de account gaat bewerken. Hij geeft aan welke stappen hij gaat ondernemen om de account aan zich te binden en/of de omzet bij	1.1 Verzamelt klant-, product- en/of marktinformatie 1.2 Doet voorstellen voor het verkoopplan 1.3 Stelt een activiteitenplan op 1.4 Voert accountanalyses uit 1.5 Stelt accountplannen op 1.6 Coördineert de uitvoering van verkoop- en accountplannen en evalueert de plannen

de account te verhogen. Hij stemt deze activiteiten af met het verkoopplan. Ook het beoogde resultaat van zijn activiteiten beschrijft hij in het accountplan. Verder legt hij (eerder) gemaakte afspraken met (betrekking tot) de account vast in het accountplan. De commercieel medewerker coördineert de uitvoering en bewaakt de voortgang van de verkoop- en accountplannen. Hij zorgt ervoor dat de plannen omgezet worden in concrete acties. Daar waar nodig geeft hij gerichte opdrachten aan c.q. verdeelt hij de werkzaamheden in het team, zodat de geplande activiteiten uitgevoerd worden. Zo bewaakt hij de relatiecontactmomenten, zodat de account conform planning bezocht c.q. benaderd wordt. Hij bewaakt of planningen worden gehaald en stuurt bij afwijkingen bij. De (junior) accountmanager rapporteert in het accountteam over de voortgang van de accountplannen en legt hierover verantwoording af aan zijn leidinggevende. Hij evalueert met het team de uitgevoerde verkoopactiviteiten en doet samen met het team verbetervoorstellen hiervoor.	

Kerntaak 2 Voert het verkooptraject uit	Werkprocessen bij kerntaak 2
Beschrijving kerntaak: De commercieel medewerker oriënteert zich op de klant voordat hij de klant aan de lijn krijgt of telefonisch/schriftelijk benadert. Zo neemt hij de klantgegevens c.q. het -dossier door en bepaalt, al dan niet in/na overleg met zijn leidinggevende en/of collega's, de wijze van klantbenadering, de doelstelling van het gesprek en/of het aanbod. De commercieel medewerker buitendienst verzamelt via diverse in- en externe kanalen (ontbrekende) informatie over de klant en zijn koopverleden. De (junior)accountmanager werkt het aanbod in een propositie uit waarvan hij verwacht dat deze voor de account doorslaggevend zal zijn om met zijn organisatie in zee te gaan. Bovendien bereidt hij 'de deal' grondig voor in/met het accountteam. De commercieel medewerker benadert (op eigen initiatief, in opdracht, of naar aanleiding van een promotieactiviteit) potentiële klanten. In het gesprek stelt commercieel medewerker vast of de klant voor de organisatie interessant is en/of tot de doelgroep van de organisatie behoort. Wanneer hij de klant als passend kwalificeert, informeert hij de klant over de organisatie en het product-/dienstenassortiment en overtuigt de klant van de voordelen van zijn organisatie en het product/de dienst. Hij rondt het gesprek af en komt tot overeenstemming met de klant over vervolgacties, zoals een bezoekafspraak, opname in het klantenbestand, toesturen van informatie, plaatsing van een order of offerte e.d. De commercieel medewerker registreert en/of rapporteert alle benodigde en verkregen gegevens uit het klantcontact . De commercieel medewerker voert een telefonisch of face-to-face verkoopgesprek met de klant. In het verkoopgesprek achterhaalt de commercieel medewerker de specifieke behoeften en wensen van de klant en koppelt deze aan de mogelijkheden van het product-/dienstenassortiment. Hij beantwoordt vragen van klanten over de toepassing, eigenschappen en verwerking van producten/diensten. De commercieel medewerker adviseert de klant over producten/diensten, speelt in op koop- en weerstandssignalen van de klant, sluit de verkoop, neemt het offerte- of orderverzoek in ontvangst en past daar waar mogelijk bijverkoop toe. Hij verzorgt tevens informatiemateriaal voor de klant. Indien de commercieel medewerker geen passend advies kan geven, neemt hij contact op met een (ervaren) collega/leidinggevende of zoekt hij informatie op in het systeem en koppelt de informatie op later moment terug aan de klant. Hij legt de relevante gegevens en gemaakte afspraken vast in het verkoopsysteem en speelt relevante zaken door en/of bespreekt deze met collega's en/of zijn leidinggevende. De (junior) accountmanager voert binnen het verkooptraject verschillende verkoopgesprekken met de DMU van een account/de organisatie. In deze gesprekken inventariseert en analyseert hij organisatieprocessen en mogelijke knelpunten voor de organisatie, onderzoekt verbetermogelijkheden of oplossingen voor de account en bepaalt op basis daarvan (in overleg met het accountteam) een waardepropositie. Hij hanteert koopgedragmodellen om in te kunnen spelen op koop- en weerstandssignalen van de DMU van een account/de organisatie. Hij bespreekt de voorstellen, propositie en/of het aanbod met de account. In het gehele traject beantwoordt hij vragen, geeft hij informatie en denkt hij met de account mee over de toepassing van het product/de dienst. Wanneer nodig, informeert hij andere betrokkenen in de organisatie van de account over het product/de dienst om deze te enthousiasmeren dan wel te kijken naar mogelijke knelpunten. In zijn eigen organisatie gaat hij	2.1 Bereidt het verkooptraject/-gesprek voor 2.2 Acquireert klanten en/of opdrachten 2.3 Verkoopt productgericht 2.4 Verkoopt behoeftegericht 2.5 Stelt offertes op en brengt ze uit 2.6 Onderhandelt met de klant/account 2.7 Verzorgt het (interne) ordertraject 2.8 Voert aftersales uit 2.9 Bewaakt de voortgang van het verkooptraject bij de account

na in hoeverre het product/de dienst op maat gemaakt kan worden. Hij kijkt met het accountteam bij elke stap naar de vervolgstap in het traject. Hij vraagt op het juiste moment in het traject naar de order of besluit het traject af te breken. Met het accountteam kijkt hij naar de juiste wijze van uitlevering van het product/ de dienst. De commercieel medewerker stelt (tijdens of na het verkoopgesprek) op basis van de door de klant en/of collega aangedragen gegevens een standaardofferte op. Hij voert hiervoor calculaties uit en stelt de prijs-, leverings- en betalingsvoorwaarden vast. Voor het vaststellen van de leveringsvoorwaarden controleert de commercieel medewerker in het systeem of de producten op voorraad zijn. Wanneer er informatie ontbreekt achterhaalt de commercieel medewerker deze, indien mogelijk, bij de klant en/of een collega. De commercieel medewerker binnendienst controleert ook offertes die door de commercieel medewerker buitendienst of (junior) accountmanager inhoudelijk zijn opgesteld op uitvoerbaarheid en correctheid, overlegt daar waar nodig met de commerciële buitendienst/het accountmanagement, en zorgt ervoor dat de klant de offerte (volgens afspraak) ontvangt. De commercieel medewerker binnendienst maakt (vaak) in opdracht van de commercieel medewerker buitendienst en/of de (junior) accountmanager een afspraak met de klant om de offerte te bespreken, bewaakt de offertetermijn en onderneemt tijdig actie bij overschrijding van deze termijn. De (junior) accountmanager stelt maatwerkoffertes op, licht de offerte altijd face-to-face toe, probeert de order/het contract direct te verkrijgen en draagt vervolgens de order over aan de commerciële binnendienst voor verdere opvolging. De commercieel medewerker voert voorafgaand aan de onderhandeling overleg met zijn leidinggevende of collega's over de marges en onderhandelingsruimte. Hij onderhandelt met de klant (over de klantcondities binnen afgesproken richtlijnen) om een akkoord te krijgen op de offerte en de klant binnen te halen. Hij brengt de eisen van de klant in kaart, legt vervolgens zijn eigen eisen op tafel, onderzoekt en verzamelt compromismogelijkheden, doet voorstellen die recht doen aan het belang van de klant. De (junior) accountmanager onderhandelt soms ook buiten kaders om. De commercieel medewerker binnendienst maakt op basis van de offerte en/of de gemaakte afspraken met de klant een verkooporder en bevestigt de geplaatste order aan de klant. Alvorens hij de order in het systeem plaatst, controleert hij of gegevens in de offerte- of orderbevestiging uitvoerbaar zijn en of de producten in voorraad zijn en wanneer dit het geval is, zorgt hij ervoor dat de order uitgeleverd kan worden. Wanneer er niet voldoende producten in voorraad zijn bestelt de commercieel medewerker binnendienst in voorkomende gevallen (intern/extern) de producten en houdt in de gaten of de bestellingen binnenkomen. De commercieel medewerker binnendienst neemt zelf contact op met de klant over het moment en de wijze van aflevering van de producten of laat dit over aan de commerciële buitendienst/het accountmanagement. De commercieel medewerker binnendienst signaleert problemen in het ordertraject, communiceert deze naar de commerciële buitendienst/het accountmanagement en in overleg wordt voor een oplossing gekozen. Vervolgens zal in veel gevallen het accountmanagement het probleem en/of de oplossing met de klant bespreken. De commercieel medewerker binnendienst handelt retourzendingen af. De commercieel medewerker buitendienst biedt ondersteuning bij de uitlevering van de order. Hij verifieert na verloop van tijd bij de klant naar de tevredenheid over het geleverde product/de geleverde dienst en kijkt naar verbetermogelijkheden. De (junior) accountmanager begeleidt in	

voorkomende gevallen actief het uitlevertraject bij de account. De (junior) accountmanager neemt na de uitlevering contact op met de klant of bezoekt hem. Hij informeert naar de ingebruikname van het product/de dienst, stuurt bij indien nodig of beantwoordt vragen van de klant. Hij informeert tevens naar de tevredenheid van de klant over het verkooptraject en stelt eventueel verbeterpunten voor verdere samenwerking vast. De (junior) accountmanager onderzoekt cross- en upsellingmogelijkheden en maakt een vervolgafspraak om deze met de account te bespreken. De (junior) accountmanager stuurt tijdens het verkooptraject collega's aan. Hij bewaakt of afspraken worden nagekomen en activiteiten worden uitgevoerd. Hij kijkt voortdurend wat de resultaten van de activiteiten zijn om tijdig bij te sturen wanneer de resultaten blijken tegen te vallen. Hij past het traject aan om beter aan te sluiten bij de account en communiceert zijn bevindingen met het accountteam. Tot slot sluit hij het verkooptraject af en rapporteert hierover aan zijn leidinggevende.	

<table>
<tr><th>Kerntaak 3 Bouwt relaties op en onderhoudt ze</th><th>Werkprocessen bij kerntaak 3</th></tr>
<tr><td>Beschrijving kerntaak:

De commercieel medewerker signaleert klachten in contacten met de klant/account. Hij gebruikt deze informatie om verbetervoorstellen te doen aan zijn leidinggevende ten aanzien van het assortiment, de serviceverlening of bedrijfsprocessen. De commercieel medewerker ontvangt ook specifieke klachten van een klant/account (via de telefoon, mail of tijdens bezoeken). Hij neemt de klacht in behandeling, toont begrip voor de klant/account en stelt vragen aan de klant/account om de oorzaak en/of ontevredenheid te achterhalen. Hij registreert de klacht en bijbehorende informatie, informeert de klant/account over de verdere afhandeling c.q. maakt met de klant/account afspraken over de wijze van afhandeling. Bij het afhandelen betrekt hij, indien nodig, collega's. Hij gaat na verloop van tijd na of de klacht inderdaad naar tevredenheid is afgehandeld. De commercieel medewerker binnendienst speelt de klacht van de klant door aan de commercieel medewerker buitendienst en/of de (junior) accountmanager wanneer zij de contactpersoon zijn voor deze klant.

De commercieel medewerker voert in opdracht en op basis van de activiteiten beschreven in het activiteitenplan promotieactiviteiten uit. Hij informeert (interne) klanten over de organisatie en het assortiment en introduceert nieuwe producten en/of diensten door middel van presentaties, demonstraties en mailings. De commercieel medewerker binnendienst biedt ondersteuning aan de beurs c.q. de beursstand. Hij ondersteunt met name bij de voorbereiding, zoals het regelen/klaarzetten van promotiemateriaal. De commercieel medewerker buitendienst bemant de beurstand. De (junior) accountmanager coördineert het opstellen en versturen van mailings en promotieaanbiedingen, bereidt stands op (regionale) beurzen voor en verzorgt seminars. Ook bemant hij stands, bezoekt zelf beurzen en hij spreekt met accounts op de beurs af. Op verzoek ondersteunt hij accounts bij hun promotieactiviteiten.

De commercieel medewerker handelt klantvragen en -verzoeken af die niet direct gerelateerd zijn aan de verkoop, maar gericht zijn op klantenbinding en serviceverlening. Op basis van product-, diensten- en organisatiekennis informeert en adviseert de commercieel medewerker de klant. Wanneer de commercieel medewerker de klantvraag of het verzoek niet direct kan afhandelen, neemt hij contact op met een (ervaren) collega of zoekt hij de vraag/het verzoek eerst uit om er later zoals afgesproken met de klant op terug te komen. Tijdens het contactmoment is de commercieel medewerker alert op signalen die de klant onbewust afgeeft, springt hierop in en optimaliseert zo de dienstverlening. Hij verifieert bij de klant of deze tevreden is over de informatievoorziening en dienstverlening en past deze aan bij onvoldoende tevredenheid. Hij signaleert verbeterpunten in de dienstverlening en speelt deze door aan zijn leidinggevende. Daarnaast hanteert hij CRM-tools om een extra klantcontact te bewerkstelligen, gaat hij op bezoek bij de klanten, informeert hij klanten gericht over ontwikkelingen naar aanleiding van mailings en aanbiedingen Verder onderhoudt hij de relatie door te kijken op welke manier hij de tevredenheid van de klant kan verhogen en de relatie kan verstevigen. De commercieel medewerker registreert het contact met de klant en legt alle verzamelde gegevens vast in het systeem en speelt de klantvragen- en verzoeken door aan een collega wanneer zij de contactpersoon zijn voor deze klant.</td><td><table><tr><td>3.1</td><td>Signaleert en behandelt klachten</td></tr><tr><td>3.2</td><td>Voert promotieactiviteiten uit</td></tr><tr><td>3.3</td><td>Onderhoudt actief contact met klanten</td></tr><tr><td>3.4</td><td>Beheert relaties</td></tr></table></td></tr>
</table>

De (junior) accountmanager fungeert als het (eerste) aanspreekpunt voor de accounts en voor collega's die vragen over/voor deze accounts hebben. Hij zoekt accounts met grote regelmaat op om het contact 'warm te houden', service te verlenen (niet direct gerelateerd aan de verkoop) en te informeren naar de gang van zaken bij de account en naar de tevredenheid over de samenwerking. Met behulp van CRM-tools bereidt hij zich voor op deze contacten. Tijdens deze contacten informeert hij accounts gericht over ontwikkelingen naar aanleiding van mailings en aanbiedingen. Hij neemt de tijd om te luisteren naar de account om te horen of er nog kansen zijn om te verkopen aan de account. Ook onderzoekt hij mogelijkheden om zijn netwerk binnen de organisatie van de account te vergroten door contacten aan te gaan met andere leden van de DMU. Hij ontplooit (nieuwe) activiteiten om de account meer voor zich te winnen. De (junior) accountmanager werkt verder aan een diepterelatie met de account door de relatie met de account op zowel het zakelijke als persoonlijke vlak te verdiepen en te verlevendigen. Zo speelt hij met incentives in op persoonlijke interesses van de account. Hij onderneemt met grote regelmaat activiteiten met de account op het persoonlijke vlak om de band te verstevigen.	

C6: Process-competence-matrix

The boxes within the matrix tell us which the competence belongs to which qualification:

Office salesman: 

Traveling salesman: 

Contact centre employee: 

(Junior) account manager: 

When there is no box in the table, it means that the competence belongs to none of the qualifications.

Proces-competentie-matrix Kerntaak 1: Onderzoekt de markt en maakt plannen

Kerntaak 1 Onderzoekt de markt en maakt plannen		A Beslissen en activiteiten initiëren	B Aansturen	C Begeleiden	D Aandacht en begrip tonen	E Samenwerken en overleggen	F Ethisch en integer handelen	G Relaties bouwen en netwerken	H Overtuigen en beïnvloeden	I Presenteren	J Formuleren en rapporteren	K Vakdeskundigheid toepassen	L Materialen en middelen inzetten	M Analyseren	N Onderzoeken	O Creëren en innoveren	P Leren	Q Plannen en organiseren	R Op de behoeften en verwachtingen van de "klant" richten	S Kwaliteit leveren	T Instructies en procedures opvolgen	U Omgaan met verandering en aanpassen	V Met druk en tegenslag omgaan	W Gedrevenheid en ambitie tonen	X Ondernemend en commercieel handelen	Y Bedrijfsmatig handelen
Werkprocessen																										
1.1	Verzamelt klant-, product- en/of marktinformatie					X					X			X	X				X	X						
1.2	Doet voorstellen voor het verkoopplan								X	X				X											X	X
1.3	Stelt een activiteitenplan op					X					X			X		X		X	X							
1.4	Voert accountanalyses uit										X			X											X	X
1.5	Stelt accountplannen op										X					X			X							
1.6	Coördineert de uitvoering van verkoop- en accountplannen en evalueert de plannen	X				X												X								

Proces-competentie-matrix Kerntaak 2: Voert het verkooptraject uit

Kerntaak 2 Voert het verkooptraject uit		Competenties																								
		A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
		Beslissen en activiteiten initiëren	Aansturen	Begeleiden	Aandacht en begrip tonen	Samenwerken en overleggen	Ethisch en integer handelen	Relaties bouwen en netwerken	Overtuigen en beïnvloeden	Presenteren	Formuleren en rapporteren	Vakdeskundigheid toepassen	Materialen en middelen inzetten	Analyseren	Onderzoeken	Creëren en innoveren	Leren	Plannen en organiseren	Op de behoeften en verwachtingen van de "klant" richten	Kwaliteit leveren	Instructies en procedures opvolgen	Omgaan met verandering en aanpassen	Met druk en tegenslag omgaan	Gedrevenheid en ambitie tonen	Ondernemend en commercieel handelen	Bedrijfsmatig handelen
Werkprocessen																										
2.1	Bereidt het verkooptraject/-gesprek voor	□■ □□				□□ □■								■■ ■■					□□ □■	□□ ■□	□□ ■□				■■ ■■	
2.2	Acquireert klanten en/of opdrachten							□□ □■	■■ ■■	□□ ■□		□□ ■□							■■ ■■	□□ ■□	□□ ■□				■■ ■■	
2.3	Verkoopt productgericht					■■ ■■			■■ ■■										■■ ■■	□□ ■□	□□ ■□				■■ ■■	
2.4	Verkoopt behoeftegericht							□□ □■	□□ □■					□□ □■					□□ □■						□□ □■	
2.5	Stelt offertes op en brengt ze uit					■■ □■				■■ □■	■■ □■								■■ □□		■■ □□					□■ □■
2.6	Onderhandelt met de klant/account								■■ □■												■■ □□				□□ □■	
2.7	Verzorgt het (interne) ordertraject					■□ □□								■□ □□				■□ □□	■□ □□		■□ □□					
2.8	Voert aftersales uit							□□ □■											□■ □■	□■ □■					□■ □■	
2.9	Bewaakt de voortgang van het verkooptraject bij de account	□□ □■				□□ □■												□□ □■	□□ □■							

Proces-competentie-matrix Kerntaak 3: Bouwt relaties op en onderhoudt ze

Kerntaak 3 Bouwt relaties op en onderhoudt ze		Competenties A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
		Beslissen en activiteiten initiëren	Aansturen	Begeleiden	Aandacht en begrip tonen	Samenwerken en overleggen	Ethisch en integer handelen	Relaties bouwen en netwerken	Overtuigen en beïnvloeden	Presenteren	Formuleren en rapporteren	Vakdeskundigheid toepassen	Materialen en middelen inzetten	Analyseren	Onderzoeken	Creëren en innoveren	Leren	Plannen en organiseren	Op de behoeften en verwachtingen van de "klant" richten	Kwaliteit leveren	Instructies en procedures opvolgen	Omgaan met verandering en aanpassen	Met druk en tegenslag omgaan	Gedrevenheid en ambitie tonen	Ondernemend en commercieel handelen	Bedrijfsmatig handelen
Werkprocessen																										
3.1	Signaleert en behandelt klachten																									
3.2	Voert promotieactiviteiten uit																									
3.3	Onderhoudt actief contact met klanten																									
3.4	Beheert relaties																									

C7: Possible education programs for the salesman

Below is a possible education program for the office salesman, the traveling salesman, the contact centre employee and the (junior) account manager. These programs have been set up by looking at competitors and see how they offer educations. It is not the final program of ExplainiT, but an example of how the organization can offer their studies in the future. The websites of two big suppliers of educations (Scheidegger and NCOI) are used. The study programs are a combination of the study programs of those two successful organizations. Again, it is just an example and overview where ExplainiT can learn from.

Office salesman level 3

Duration

1 year.

Design

This is a short education that is very practice-based and specially designed to combine learning and working. There is a combination of meetings and a practice program (together with an online learning environment).

Target group

This education has been developed for every (future) office salesman (older than 18 years) that wants to evolve itself.

Practice program

The practice program consists of certain practical assignments, of which the participants should make a report. These assignments link the theory with the practice part. The program will be finished with an end conversation. Results will be secured in a portfolio.

Day- and evening education

The day education will take 1 year and consists of 12 meetings from 09.30 AM till 16.30.
The evening education will take 1 year and consists of 24 meetings from 18.00 PM till 21.00.

Study program

The education consists of 4 modules of 6 meetings each:

Business correspondence

- Different kinds of correspondence.
- Preparing correspondence.
- Formulating and drafting texts.
- Format and corporate design.
- Communication means.
- Distributing texts and information.

Marketing

- Core elements of marketing.
- Consumer behaviour.
- The marketing mix.
- Product- and price policy.
- Promotion and advertising.
- Competitors analysis.
- Marketing planning.

Sales methods and sales techniques

- The sales process.
- Working with sales plans.
- Making proposals.
- Closing contracts.
- Office relations and outside-the-office relations.
- Marketing and sales.
- Relationship management and CRM.

Sales skills

- The sales conversation.
- Commercial conversation techniques.
- Presenting products and services.
- Sales techniques and sales arguments.
- Buying and resistance signals.
- Commercial negotiating.
- Finishing techniques.
- Dealing with complaints.

Diploma

The education consists out of 4 modules of which 2 will be completed with an practice-based assignment and 2 with a written exam. When the result of the assignments, exams and practice program is sufficient, the participant receives the diploma "MBO Commercieel Medewerker Binnendienst niveau 3", as registered in the Dutch "Centraal Register Beroepsopleidingen".
(Website NCOI)

Estimated costs

Registration fee:	€ 100
The course:	€ 2,500 (or 4 x € 675)
Study materials:	€ 600
Exam costs:	€ 150 x 4 (for each module)
Practice program:	€ 750
Total costs:	€ 4,550

Traveling salesman level 3

Duration

1 year.

Design

The participant develops its skills and knowledge needed as a traveling salesman. It is a practice-based study and combines learning and working.

Target group

This education has been developed for every (future) traveling salesman (older than 18 years) that wants to increase its knowledge and skills to be more successful in executing their job.

Practice program

The practice program consists of certain practical assignments, of which the participants should make a report. These assignments link the theory with the practice part. The program will be finished with an end conversation. Results will be secured in a portfolio.

Day- and evening education
The day education will take 1 year and consists of 12 meetings from 09.30 AM till 16.30.
The evening education will take 1 year and consists of 24 meetings from 18.00 PM till 21.00.

Study program
The education consists of 4 modules of 6 meetings each:

Marketing
- Core elements of marketing.
- Consumer behaviour
- The Marketing mix.
- Product- and price policy.
- Promotion and advertising.
- Competitors analysis.
- Marketing planning.

Sales- and account management
- Analysing accounts.
- Adjusting the sales approach, based on different accounts.
- Methods of calculating and budgeting.
- Making account- and sales plans.
- Planning, reporting and guarding the progress.

Sales methods and sales techniques
- The sales process.
- Working with sales plans.
- Making proposals.
- Closing contracts.
- Office relations and outside-the-office relations.
- Marketing and sales.
- Relationship management and CRM.

Sales skills
- The sales conversation.
- Commercial conversation techniques.
- Presenting products and services.
- Sales techniques and sales arguments.
- Buying and resistance signals.
- Commercial negotiating.
- Finishing techniques.
- Dealing with complaints.

Diploma
The education consists out of 4 modules of which 2 will be completed with an practice-based assignment and 2 with a written exam. When the result of the assignments, exams and practice program is sufficient, the participant receives the diploma “MBO Commercieel Medewerker Buitendienst niveau 3”, as registered in the Dutch “Centraal Register Beroepsopleidingen”.
(Website NCOI)

Estimated costs

Registration fee:	€ 100
The course:	€ 2,500 (or 4 x € 675)
Study materials:	€ 600
Exam costs:	€ 150 x 4 (for each module)
Practice program:	€ 750
Total costs:	€ 4,550

Contact centre employee level 3

Duration

1 year.

Design

The participant develops its skills and knowledge needed as a contact centre employee. The education is very practice-based and also offers a practice program, where the learned skills will be applied in practice.

Target group

This education has been developed for everyone (older than 18 years) that wants to become a professional contact centre employee and wants to obtain the required diploma.

Practice program

The practice program consists of certain practical assignments, of which the participants should make a report. These assignments link the theory with the practice part. The program will be finished with an end conversation. Results will be secured in a portfolio.

Day- and evening education

The day education will take 1 year and consists of 12 meetings from 09.30 AM till 16.30.
The evening education will take 1 year and consists of 24 meetings from 18.00 PM till 21.00.

Study program

The education consists of 4 modules of 6 meetings each:

Business phone calls

- Business communication by phone.
- Phone friendliness.
- Incoming conversations.
- Welcoming and putting through.
- Finishing the conversation.
- Making notes.
- Reachability.

Marketing

- Core elements of marketing.
- Market analysis and research.
- The Marketing mix.
- Product- and price policy.
- Promotion and advertising.
- Competitors analysis.
- Organization strategy.

- Marketing planning.

Office sales

- Tasks of the office sales.
- Customer direction.
- Customer directed phone calls.
- Making proposals/offers.
- The internal order path.
- Executing promotion activities.
- Maintaining customer relationships.
- Sales- and account management.

Sales skills

- Acquisition skills.
- Making appointments.
- Commercial conversation techniques.
- Questioning- and listening techniques.
- The sales conversation.
- Negotiating techniques.
- Dealing with complaints.

Diploma

The education consists out of 4 modules of which 2 will be completed with an practice-based assignment and 2 with a written exam. When the result of the assignments, exams and practice program is sufficient, the participant receives the diploma "MBO Contactcenter Medewerker niveau 3", as registered in the Dutch "Centraal Register Beroepsopleidingen".
(Website Scheidegger)

Estimated costs

Registration fee:	€ 100
The course:	€ 2,500 (or 4 x € 675)
Study materials:	€ 600
Exam costs:	€ 150 x 4 (for each module)
Practice program:	€ 750
Total costs:	€ 4,550

(Junior) account manager level 4

Duration

2 years.

Design

This education is very practice-based. It is special designed for people who want to combine learning and working. Participants develop the skills and knowledge necessary to become a (junior) account manager. A successful account manager is educated in commerce and maintaining relationships, but also must have good notion of the market, of competitors and the added value of their own product/service. There is an extensive practice program, where the learned skill will be applied in practice.

Target group
This education has been developed for office- and traveling salesmen and junior account managers (older than 18 years) that want to develop themselves towards a full-fledged account manager.

Practice program
The practice program consists of practical assignments, of which the participants makes a report. During the meetings, the participant develops his/her skills. The results will be secured in a portfolio.

Day- and evening education
The day education will take 2 years and consists of 24 meetings from 09.30 AM till 16.30.
The evening education will take 2 years and consists of 48 meetings from 18.00 PM till 21.00 PM.

Study program
The education consists of 8 modules of 6 meetings each:

Business correspondence
- Different kinds of correspondence.
- Preparing correspondence.
- Formulating and drafting texts.
- Format and corporate design.
- Communication means.
- Distributing texts and information.

Management skills
- Situational directing.
- Instructing.
- Delegating.
- Coordinating activities.
- Staff policy.
- Reviews of functioning.

Marketing
- Core elements of marketing.
- Consumer behaviour.
- The marketing mix
- Product- and price policy.
- Promotion and advertising.
- Competitors analysis.
- Marketing planning.

Personal effectiveness
- Time management.
- Dealing with workload.
- Personal presentation.
- Core qualities and points for development.
- Customer directed confidence.
- Proactive acting and deciding.

Sales methods and sales techniques
- The sales process.

- Working with sales plans.
- Making proposals.
- Closing contracts.
- Office relations and outside-the-office relations.
- Marketing and sales.
- Relationship management and CRM.

Sales skills

- The sales conversation.
- Commercial conversation techniques.
- Presenting products and services.
- Sales techniques and sales arguments.
- Buying and resistance signals.
- Commercial negotiating.
- Finishing techniques.
- Dealing with complaints.

The market and market research

- The principle of market research.
- What is relevant information?
- Market players and their place.
- Subdividing markets.
- The place of the own organization.
- Presenting market research data.
- Graphics and diagrams.
- Translating outcomes to actions.

Understanding finance

- Business economic concepts.
- Important logistic prefixes.
- Cost calculations.
- Commercial prefixes and return.
- Working with budgets.
- Keeping budgets.
- Reading and analysing financial reports.
- Making financial reports.

Diploma

The exams are a combination of practice-based written exams, practice assignments and the practice program. The education will be finished with the diploma "MBO Accountmanager niveau 4", as registered in the Dutch "Centraal Register Beroepsopleidingen". (Website NCOI)

Estimated costs

Registration fee:	€ 100
The course:	€ 3,000 (or 6 x € 550)
Study materials:	€ 1,000
Exam costs:	€ 150 x 8 (for each module)
Practice program:	€ 1,000
Total costs:	€ 5,300

Appendix D: Request form of DUO-CFI

D1: "Aanvraag diploma-erkenning beroepsonderwijs"

Dienst Uitvoering Onderwijs
Ministerie van Onderwijs, Cultuur en Wetenschap

Aanvraag
Diploma-erkenning beroepsonderwijs

Dit formulier
Met dit formulier doet u een aanvraag voor de diploma-erkenning van een beroepsopleiding (inclusief Groen Onderwijs), en een aanmelding voor registratie hiervan in het Centraal Register Beroepsopleidingen.

Opsturen
Dienst Uitvoering Onderwijs
Postbus 606
2700 ML Zoetermeer

Meer informatie
www.duo.nl
ICO/BVH (079) 323 26 66

1 Gegevens instelling

1.1 BRIN-nummer
1.2 Naam instelling
1.3 Straat en huisnummer
1.4 Postcode en plaats

2 Gegevens contactpersoon

2.1 Achternaam
2.2 Voorletter(s)
2.3 Telefoon
2.4 E-mail

3 Gegevens bevoegd gezag

3.1 Nummer bevoegd gezag
3.2 Naam bevoegd gezag
3.3 Straat en huisnummer
3.4 Postcode en plaats

4 Gegevens studiejaar

4.1 De aanvraag heeft betrekking op het studiejaar ____ - ____

60978-002

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2 van 2

Aanvraag **Diploma-erkenning beroepsonderwijs**
Dienst Uitvoering Onderwijs
Ministerie van Onderwijs, Cultuur en Wetenschap

5 Gegevens nieuw aangemelde opleidingen

	Opleidingscode	Naam opleiding	Leerweg	Studieduur in uren
5.1 Opleidingsgegevens				

6 Ondertekening

Het bevoegd gezag verklaart dit formulier naar waarheid ingevuld te hebben. Verder verklaart het bevoegd gezag:
- te zullen voldoen aan de regels in hoofdstuk 7 van de WEB, met uitzondering van artikel 7.1.1, voor het onderwijs, de examens en de kwaliteitszorg
- dat er een commissie van beroep is ingesteld die voldoet aan de voorwaarden uit artikel 7.5.1. van de WEB
- dat er geen juridisch of persoonlijk verband is met een exameninstelling.

6.1 Achternaam tekenbevoegde

6.2 Voorletter(s) tekenbevoegde

6.3 Telefoon

6.4 E-mail

6.5 Plaats

6.6 Datum

6.7 Handtekening

(Website CFI)

D2: Information form for requesting education

Dienst Uitvoering Onderwijs
Ministerie van Onderwijs, Cultuur en Wetenschap

Mededeling
Mededeling OCW

Datum
15 maart 2011
Kenmerk
DUO/ODS-2011/11409

Voorlichtingspublicatie

Betreft de onderwijssector(en)
Voorgezet onderwijs
Beroepsonderwijs en Volwasseneneducatie

Informatie DUO/ICO
vo 079-3232.444
bvh 079-3232.666

Aanvraagprocedure diploma-erkenning voor niet bekostigde instellingen voor het beroepsonderwijs

Bestemd voor
- instellingen voor niet-bekostigd beroepsonderwijs

Datum inwerkingtreding
n.v.t.

Geldigheidsduur
n.v.t.

Juridische grondslag
n.v.t.

Officiële publicatie
n.v.t.

Relatie tot eerdere publicaties
n.v.t.

Mededeling
Mededeling OCW

Datum
15 maart 2011
Kenmerk
DUO/ODS-2011/11409

1. Diploma-erkenning

1.1 Inleiding

Deze publicatie bevat informatie over de procedure voor het aanvragen van diploma-erkenning voor niet bekostigde instellingen. Deze aanvraag geldt ook als aanmelding voor registratie in het Centraal register (CREBO).
De hier beschreven procedure betreft de aanvragen voor eindtermengerichte opleidingen voor het studiejaar 2011/2012.
Vooruitlopend op de invoering van het wetsvoorstel CKS (onder voorbehoud van goedkeuring door de Staten-Generaal) is deze publicatie ook van toepassing op de opleidingen volgens de competentiegerichte kwalificatiedossiers die u op of na 1 januari 2012 aanvraagt. Deze aanvragen kunnen vanaf dat moment niet meer worden gedaan bij het Proces Management herontwerp MBO.

1.2 Eerste niet bekostigde opleiding

Indien er sprake is van een aanvraag diploma-erkenning voor een opleiding bij een nog niet in CREBO geregistreerde niet-bekostigde instelling wordt voor de instelling bij een positief besluit ook direct een Brinnummer afgegeven. Voor diploma-erkenning en opname in CREBO dient een instelling immers te beschikken over een Brinnummer
Omdat een schriftelijke aanvraag voor diploma-erkenning per opleiding beoordeeld wordt, geldt voor deze nog niet in het CREBO geregistreerde instellingen dat bij aanvragen voor meer dan één opleiding uit de kwalificatiestructuur, de aanvragen moeten worden gebundeld. Als een document voor meer dan één opleiding van toepassing is dient u duidelijk aan te geven voor welke opleidingen dit document geldt.

1.3 Voortzetting competentiegerichte opleidingen

Voor de Competentiegerichte opleidingen(Cgo) geldt thans dat deze jaarlijks moeten worden aangevraagd. Ook als voor deze opleidingen in voorgaande jaren al een erkenning was afgegeven. Dit geldt in ieder geval tot aan de inwerkingtreding van het wetsvoorstel CKS. Dit betekent dus dat u, ook als u het aanbod aan competentiegerichte opleidingen niet wilt uitbreiden, maar de lopende opleidingen wel wilt continueren, jaarlijks een aanvraag diploma-erkenning voor deze opleidingen moet indienen.
De Inspectie van het Onderwijs (Ivh0) zal voorafgaand aan de diploma- erkenning, de opleiding(en) waarvoor een aanvraag is ingediend toetsen op kwalitatieve aspecten in de praktijk door middel van kwaliteitsonderzoeken. Dit kunnen zowel dossieronderzoeken als onderzoeken bij de instelling ter plaatse zijn. In paragraaf 2.2 is beschreven over welke documenten en informatie de Inspectie hiervoor dient te beschikken.

Mededeling
Mededeling OCW

Datum
15 maart 2011
Kenmerk
DUO/ODS-2011/11409

Uiteraard zal de Inspectie van het Onderwijs –naast het beoordelen van de aanvraag- in het kader van het reguliere toezicht (zie de Wet op het Onderwijstoezicht) bij deze reeds door de instelling verzorgde opleidingen een kwaliteitsonderzoek kunnen uitvoeren.

1.4 Aanvraag competentiegerichte kwalificatiedossiers/opleidingen voor het studiejaar 2011/2012

Voor het aanvragen van de opleidingen volgens de competentiegerichte kwalificatiedossiers voor het studiejaar 2011/2012 verwijs ik u naar de brief *"procedure Experimenten 2011-2012"*, d.d. 18 januari 2011, met *kenmerknummer 7756/Exp 2011-2012*, van het Proces Management herontwerp mbo en de *OCW- regeling experimenten herontwerp kwalificatiestructuur mbo 2011/2012, van 13 februari 2011, nr BVE/Stelsel 266974; gepubliceerd in de Staatscourant van 1 maart 2011, nr 3616*. Meer informatie over dit onderwerp vindt u op de internetsite **www.mbo2010.nl**.
De aanvraag voor deze opleidingen die u voor het cursusjaar 2011-2012 nog bij het Proces Management herontwerp mbo indient, geldt ook als aanvraag voor registratie van de opleiding in het Centraal Register. De goedkeuring op de Cgo kwalificatiedossiers van het procesmanagement herontwerp mbo is daarbij een voorwaarde voor die registratie.

2. Aanvraagprocedure

Een aanvraag voor diploma-erkenning -voor zover het de eindtermengerichte opleidingen met betrekking tot het studiejaar 2011/2012 dan wel de opleidingen volgens de competentiegerichte kwalificatiedossiers die vanaf het studiejaar 2012/2013 worden verzorgd- moet worden ingediend met gebruikmaking van het formulier *'Verzoek om diploma-erkenning'*. Dit **formulier (nummer 60978-002)** vindt u op de internetsite van DUO **(www.ocwduo.nl),** naar DUO-CFI bij Onderwerpen en vervolgens *Formulieren*.

Uw aanvraag kunt u vergezeld van alle bijlagen sturen aan:

- DUO/OND/ODS
  Postbus 606
  2700 ML Zoetermeer

Binnen drie maanden na ontvangst van een aanvraag kunt u een besluit tegemoet zien (artikel 1.4.1, tweede lid van de Wet Educatie Beroepsonderwijs) (WEB). Indien de aanvraag aanleiding geeft tot nadere toetsing door de IvhO (zie paragraaf 2.1) of om andere redenen niet binnen deze termijn kan worden afgehandeld, kan deze termijn met (maximaal) 3 maanden worden verlengd. Ik stel u hiervan in voorkomende gevallen voor het aflopen van de eerste termijn van drie maanden op de hoogte.

Gelet op bovenstaande adviseer ik u tijdig uw aanvraag in te dienen.

2.1 Verplicht in te zenden gegevens

Bij een aanvraag voor diploma-erkenning zendt u in ieder geval gegevens in waaruit blijkt dat het onderwijs van voldoende kwaliteit is of zal zijn en dat wordt voldaan aan de

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Mededeling
Mededeling OCW

Datum
15 maart 2011
Kenmerk
DUO/ODS-2011/11409

voorwaarde als bedoeld in artikel 1.4.1, eerste lid, van de WEB. De voorwaarde als bedoeld in artikel 1.4.1, eerste lid, van de WEB schrijft voor dat de wettelijke bepalingen in acht worden genomen ten aanzien van:

a. de kwaliteitszorg, bedoeld in artikel 1.3.6,
b. het onderwijs -met uitzondering van artikel 7.1.1- en de examens,
c. de rechtsbescherming van de deelnemers, bedoeld in hoofdstuk 7, titel 5,
d. de onderwijsovereenkomst, bedoeld in artikel 8.1.3, eerste tot en met derde lid,
e. de vooropleidingseisen, bedoeld in artikel 8.2.1, en
f. de opneming in het Centraal Register.

Bij het formulier 'Verzoek om diploma-erkenning' voegt u de volgende bijlagen:

a. een beschrijving van het stelsel van kwaliteitszorg (artikel 1.3.6 van de WEB, zie ook hieronder punt 2.2 beschrijving stelsel kwaliteitszorg);
b. een beschrijving van de wijze waarop de zorgplicht bedoeld in art. 7.4.8 van de WEB wordt nagekomen;
c. een beschrijving van het onderwijs en de examens;

Deze beschrijving bevat in ieder geval de volgende onderdelen:

1. de inrichting van het onderwijsprogramma, met daarin per opleiding de voor die opleiding specifieke informatie en de informatie daarover aan de deelnemers;
2. de jaarplanning waaruit blijkt op welke wijze invulling wordt gegeven aan het wettelijk minimum aantal uren onderwijstijd en beroepspraktijkvorming;
3. de beschikbare en gehanteerde leer- en hulpmiddelen per opleiding;
4. de voor de deelnemers aan de opleiding geldende vooropleidingseisen;
5. de inrichting van het examenprogramma, met daarbij een overzicht van de kwalificerende toetsing, een beschrijving van het examenproces, het examenreglement en een beschrijving van de inrichting en werkwijze van de commissie van beroep voor de examens met namen en contactgegevens van deze commissie;
6. een beschrijving van de wijze waarop verzuim en voortijdig schoolverlaten (VSV) zal worden geregistreerd en naar aanleiding daarvan een beschrijving van de verzuim- en meldprocedure met betrekking tot de deelnemers die (nog) vallen onder de kwalificatieplicht.
7. een model van de onderwijsovereenkomst, bedoeld in artikel 8.1.3. van de WEB;
8. een model van de beroepspraktijkvormingsovereenkomst (BPV) als bedoeld in artikel 7.2.8 van de WEB en een beschrijving over de manier waarop de BPV wordt vormgegeven en een weergave van de verkenning en contacten met instellingen die als leerbedrijf gaan fungeren met namen en contactgegevens van deze commissie;
9. een deelnemersstatuut inclusief weergave van klachtenregeling en klachtencommissie met namen en contactgegevens van deze commissie;
10. indien van toepassing, de Verklaring opleidingstraject voor toepassing Wet op de Studiefinanciering 2000, (formulier DUO 60988-002);
11. een afschrift van een uittreksel van de Kamer van Koophandel, dan wel van de notariële akte van oprichting van de rechtspersoon.

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In het formulier 'Verzoek om diploma-erkenning' is een standaardformulering opgenomen waarmee het bevoegd gezag door ondertekening van het formulier verklaart:

- te zullen voldoen aan de regels beschreven in hoofdstuk 7 van de WEB (met uitzondering van artikel 7.1.1) voor het onderwijs en de examens als ook van de kwaliteitszorg;
- dat er een commissie van beroep is ingesteld, die voldoet aan de voorwaarden, beschreven in artikel 7.5.1 van de WEB.
- dat er geen juridisch dan wel persoonlijk belang bestaat met een exameninstelling als bedoeld in artikel 1.6.1 van de wet.

Instellingen, die beroepsopleidingen in de beroepsopleidende leerweg onder de werkingssfeer van de Wet op de studiefinanciering wensen te plaatsen, dienen gebruik te maken van het formulier 'Verklaring opleidingstraject voor toepassing wet op de studiefinanciering 2000'. (Zie ook paragraaf 4.)

2.2 Beschrijving stelsel kwaliteitzorg

In de beschrijving van het stelsel van kwaliteitszorg (artikel 1.3.6 van de WEB) geeft u in ieder geval aan:

- op welke opleidingen het stelsel van toepassing zal zijn en welke methodes van kwaliteitszorg gehanteerd zullen worden;
- de kwalificaties van het personeel verbonden aan de opleiding;
- op basis van welke deskundigheid onafhankelijke deskundigen worden betrokken bij de regelmatige beoordeling van de kwaliteit van het onderwijs, welke werkzaamheden ze verrichten en hoe dikwijls ze worden ingeschakeld;
- de wijze waarop het kwaliteitszorgstelsel regelmatig intern en extern geëvalueerd zal worden. Daarbij worden de criteria waarmee de instelling de eigen prestaties waardeert, duidelijk omschreven.

Verder moet worden beschreven:

- op welke wijze deelnemers aan de opleidingen geïnformeerd worden over de consequenties (bv voor het verkrijgen van studiefinanciering) van de deelname aan een niet bekostigde opleiding;
- op welke wijze deelnemers worden geïnformeerd over de mogelijke alternatieve wijze(n) waarop de opleiding kan worden afgerond indien deze voortijdig aan de betreffende instelling worden beëindigd;
- op welke wijze de beschikbaarheid en kwaliteit van de huisvesting van de opleiding is georganiseerd en gegarandeerd.

3. Doorgeven wijzigingen

3.1 Melding beëindiging door bevoegd gezag en ambtshalve doorhaling CREBO

Op grond van het gestelde in artikel 6.4.4 van de WEB moet het bevoegd gezag van een niet bekostigde instelling de Minister te kennen geven dat een opleiding niet (langer) wordt verzorgd bijvoorbeeld als gevolg van een faillissement. Deze melding moet plaatsvinden voor 1 oktober van het jaar voorafgaand aan het studiejaar waarin de opleiding niet (langer) wordt verzorgd. De kennisgeving leidt tot een beëindiging van de registratie in CREBO (uitgevoerd door DUO).

Indien de instelling de opleiding niet langer verzorgt en het bevoegd gezag de hiervoor bedoelde kennisgeving niet of niet tijdig doet, beëindigt de Minister de registratie ambtshalve.

Wanneer de laatste aan de instelling verbonden opleiding wordt beëindigd, wordt ook de registratie van de instelling in Brin beëindigd.

3.2 Intrekken erkenning

Op grond van het gestelde in artikel 6.2.2 en artikel 6.2.3b van de WEB kan de Inspectie van het Onderwijs, indien wordt geconstateerd dat de kwaliteit van de examens dan wel de kwaliteit van de opleiding niet volstaat, namens de minister een instelling het recht op examinering, dan wel het verzorgen van een beroepsopleiding ontnemen. De toets als bedoeld in onderdeel 1.3 van deze regeling kan daartoe aanleiding geven.
Indien er sprake is van een beëindiging van een opleiding heeft de instelling nog wel een plicht in acht te nemen ten aanzien van deelnemers die nog een examen wensen af te leggen voor de te beëindigen opleiding. Deze plicht bestaat eruit dat indien door onvoorziene omstandigheden het examen niet op de voorgeschreven wijze kan worden afgenomen, het bevoegd gezag van de instelling na overleg met de Inspectie besluit hoe in dat geval moet worden gehandeld.

3.3 Fusie en overdracht van rechten

Diploma-erkenning wordt verleend aan het bevoegd gezag van een instelling.
Als de relatie tussen het bevoegd gezag en de instelling, of de opleiding waarvoor diploma-erkenning verleend is, verbroken wordt, vervalt daarmee de erkenning. De volgende situaties kunnen zich voordoen:

1. De rechtspersoon waar de instelling van uitgaat, fuseert met een andere rechtspersoon (boek 2 van het Burgerlijk Wetboek). De relatie tussen bevoegd gezag (de rechtspersoon) en de instelling wijzigt in dit geval niet. Er verandert niets ten aanzien van de verleende diploma-erkenning. Er hoeft geen nieuwe aanvraag te worden ingediend. Wel moet het ministerie in kennis worden gesteld van de fusie, onder overlegging van de akte waarin de fusie is geregeld. Deze melding vindt plaats aan DUO.
2. De aandelen in een NV of BV waarvan een instelling uitgaat, gaan in andere handen over. De relatie tussen rechtspersoon en instelling verandert niet, dus de diploma-erkenning blijft in stand.
3. De instelling wordt in zijn geheel -inclusief opleidingen- verkocht aan een andere rechtspersoon. De relatie tussen bevoegd gezag en instelling wordt verbroken en daarmee vervalt de diploma-erkenning. Er moet dan een nieuwe aanvraag voor diploma-erkenning worden ingediend door de nieuwe instelling.
4. De rechtspersoon wordt in zijn geheel opgenomen in een juridische entiteit (Concern). Het bevoegd gezag houdt niet op te bestaan maar blijft binnen

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de nieuwe juridische entiteit (zoals een BV of NV) wel zelfstandig bestaan. De bestaande diploma-erkenningen blijven bestaan, maar mogen uitsluitend worden aangewend door dit onderdeel binnen de juridische entiteit.

5. Eén of meer van de opleidingen, die zijn verbonden aan een instelling worden verkocht aan een andere rechtspersoon. Hierdoor vervalt de diploma-erkenning. Diploma-erkenning moet opnieuw worden aangevraagd.

3.4 Wijziging gegevens

Indien u opleidingen (op grond van het gestelde in artikel 6.4.4 van de WEB) wilt beëindigen of indien er sprake is van een faillissement van de instelling, dient u dit kenbaar te maken door een brief te sturen aan het onderstaand gegeven adres.

De melding van de beëindiging van een opleiding moet plaatsvinden *vóór 1 oktober* van het jaar voorafgaand aan het studiejaar waarin de opleiding niet (langer) wordt verzorgd. De kennisgeving leidt tot een beëindiging van de registratie in CREBO (uitgevoerd door DUO).

In alle gevallen waarin zich wijzigingen voordoen met betrekking tot het bevoegd gezag van de instelling, moet DUO daarvan schriftelijk op de hoogte worden gebracht. Bij deze melding met het *Brin-mutatieformulier (BMF)* moet op basis van artikel 1.4.1, derde lid, WEB, een afschrift van de betreffende notariële akte worden overlegd.

Adresgegevens dient u te wijzigen door een BMF in te dienen bij:

- DUO/OND/ODS
  Postbus 606
  2700 ML Zoetermeer

Meer informatie over het gebruik van het BMF kunt u vinden in de voorlichtingspublicatie *"Wijziging Brin-mutatieformulier (BMF)"*, zoals gepubliceerd in Gele Katern nummer 14 van 16 mei 2000. U vindt deze informatie op de internetsite van DUO **(www.ocwduo.nl)** naar DUO-CFI bij Onderwerpen en vervolgens *Regelgeving/ Archief Regelingen*.

4. Studiefinanciering beroepsopleidingen

Deelnemers aan voltijdse beroepsopleidingen als bedoeld in artikel 7.2.7, derde lid van de WEB kunnen in aanmerking komen voor studiefinanciering. Het formulier *'Verklaring opleidingstraject voor toepassing Wet op de Studiefinanciering 2000'* (formulier nummer 60988-002) wordt gebruikt bij nieuw te registreren beroepsopleidingen bij een instelling. U zendt dit in samen met de aanvraag diploma-erkenning. Het vormt één geheel met de procedure voor diploma-erkenning, registratie CREBO en toetsing urennorm (WSF). Onderdeel van de procedure is de inhoudelijke toetsing van het opleidingstraject door de Inspectie van het Onderwijs.

Ik wijs u er wel op dat uit de beschrijving van het onderwijsprogramma dient te blijken dat de opleiding voldoet aan de eisen van artikel 7.2.7, derde lid van de WEB. (Zie ook artikel 7.4.8, derde lid, van de WEB.)

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Ook in de praktijk zal de opleiding aan de eisen van artikel 7.2.7, derde lid, van de WEB moeten voldoen. De Verklaring opleidingstraject ontheft u als instelling niet van deze verplichting.

Wat hiervoor is gesteld voor Studiefinanciering geldt ook voor de Tegemoetkoming Onderwijsbijdrage op grond van de Wet Tegemoetkoming Onderwijsbijdrage en Schoolkosten (artikel 2.7 WTOS).

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Het formulier met het *nummer 60988-002* vindt u op de internetsite van DUO **(www.ocwduo.nl)**, onder Formulieren. De formulieren kunt u samen met de aanvraag diploma-erkenning sturen aan:

- DUO/OND/ODS
  Postbus 606
  2700 ML Zoetermeer

De directeur-generaal van de Dienst Uitvoering Onderwijs,
drs. R.J.A. Kerstens

(Website CFI)

Appendix E: WEB Article 1.4.1

De voorwaarde als bedoeld in artikel 1.4.1, eerste lid, van de WEB schrijft voor dat de wettelijke bepalingen in acht worden genomen ten aanzien van:

a. de kwaliteitszorg, bedoeld in artikel 1.3.6,
b. het onderwijs -met uitzondering van artikel 7.1.1- en de examens,
c. de rechtsbescherming van de deelnemers, bedoeld in hoofdstuk 7, titel 5,
d. de onderwijsovereenkomst, bedoeld in artikel 8.1.3, eerste tot en met derde lid,
e. de vooropleidingseisen, bedoeld in artikel 8.2.1, en
f. de opneming in het Centraal Register.

Bij het formulier 'Verzoek om diploma-erkenning' voegt u de volgende bijlagen:

a. een beschrijving van het stelsel van kwaliteitszorg (artikel 1.3.6 van de WEB, zie ook hieronder punt 2.2 beschrijving stelsel kwaliteitszorg);
b. een beschrijving van de wijze waarop de zorgplicht bedoeld in art. 7.4.8 van de WEB wordt nagekomen;
c. een beschrijving van het onderwijs en de examens;

Deze beschrijving bevat in ieder geval de volgende onderdelen:

1. de inrichting van het onderwijsprogramma, met daarin per opleiding de voor die opleiding specifieke informatie en de informatie daarover aan de deelnemers;
2. de jaarplanning waaruit blijkt op welke wijze invulling wordt gegeven aan het wettelijk minimum aantal uren onderwijstijd en beroepspraktijkvorming;
3. de beschikbare en gehanteerde leer- en hulpmiddelen per opleiding;
4. de voor de deelnemers aan de opleiding geldende vooropleidingseisen;
5. de inrichting van het examenprogramma, met daarbij een overzicht van de kwalificerende toetsing, een beschrijving van het examenproces, het examenreglement en een beschrijving van de inrichting en werkwijze van de commissie van beroep voor de examens met namen en contactgegevens van deze commissie;
6. een beschrijving van de wijze waarop verzuim en voortijdig schoolverlaten (VSV) zal worden geregistreerd en naar aanleiding daarvan een beschrijving van de verzuim- en meldprocedure met betrekking tot de deelnemers die (nog) vallen onder de kwalificatieplicht.
7. een model van de onderwijsovereenkomst, bedoeld in artikel 8.1.3. van de WEB;
8. een model van de beroepspraktijkvormingsovereenkomst (BPV) als bedoeld in artikel 7.2.8 van de WEB en een beschrijving over de manier waarop de BPV wordt vormgegeven en een weergave van de verkenning en contacten met instellingen die als leerbedrijf gaan fungeren met namen en contactgegevens van deze commissie;
9. een deelnemersstatuut inclusief weergave van klachtenregeling en klachtencommissie met namen en contactgegevens van deze commissie;
10. indien van toepassing, de Verklaring opleidingstraject voor toepassing Wet op de Studiefinanciering 2000, (formulier DUO 60988-002);
11. een afschrift van een uittreksel van de Kamer van Koophandel, dan wel van de notariële akte van oprichting van de rechtspersoon.

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