

Helena Sabbagh | Hendrik Biebeler

Quality Assurance in Company-Based Practice – Planning and Structuring of In-company Training by Way of the Example of the Occupation of Office Manager



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► 1 Summary of key aspects

This study investigates the structuring and planning of in-company training from the perspective of quality assurance by using the occupation of office manager as an example. It is based on data material and results from the BIBB research project “Planning and structuring training within the context of work-based learning” (cf. SCHREIBER et al. 2023). This research project encompassed the execution and evaluation of 45 company case studies in 2019 and of 1,343 telephone interviews in 2020. In both instances, the interviewees comprised training managers at companies¹ providing training across 18 dual occupations. 238 of these telephone-based interviews with training managers and 13 company case studies relating to the occupation of office manager were used for the evaluations presented below. Results regarding the other occupations frequently act as a reference category which is then able to illustrate the specific characteristics of the selected occupation more clearly.

The most important findings of this study are as follows.

- **Fewer difficulties are experienced during training:** In the case of the occupation of office manager, there are fewer problems with the recruitment of apprentices and lower drop-out rates compared to all 18 occupations included in the main study (better values in respect of input and output characteristics).
- **Written training planning is predominant:** The telephone survey revealed that 83 percent of the 238 companies providing training in the occupation of office manager drew up a written training plan. The likelihood that a written training plan will be in place is thus 25 percentage points higher than at the 1,343 companies offering training places in the 18 occupations. In the case of the latter group, written planning of training only occurs in 59 percent of instances. Non-written training planning is therefore of lesser significance. There is a negligible frequency of situative planning, i.e. cases where company orders give rise to training (see the four categories of training planning in Chapter 5.1.1).
- **The deployment plan plays a key role:** Most companies investigated use scheduling in the form of a transfer or deployment plan. This lists all the departments or company areas in which commercial apprentices need to gain experience. Such plans may be designed with professional or with didactic and pedagogical considerations in mind. A deployment plan is generally subject to frequent adaptations rather than being a static tool. It thus constitutes a quality assurance instrument for both input and process quality. It often provides the foundation for planning the content of training and is deployed in parallel with this procedure.
- **Content training plans exhibit a broad range of difference:** Simple tabular views allocating training contents to aspects such as learning venues and times may be used. At a higher level, there are written explanations of “how” competencies are to be imparted. The most elaborate stage is reached when the outcome of the company’s interpretation of the contents of the general training plan is consciously turned into part of the training system. Multifunctional tools use the additional integration of information materials and feedback instruments as a vehicle to encourage apprentices to take responsibility, in dialogue with training staff, for successive parts of planning and adaptation during the training process.

¹ We also use the terms “company” and “firm” when referring to the public sector (§ 3, Paragraph 2 BüroMK-fAusbV 2025).

- ▶ **Content and time structure are merged:** The planning reality of companies providing training is that they will remove the separation of content and suggested time allocations set out in the two annexes to the training regulations². This outcome is being supported by the current update of the occupation of office manager, in which there will no longer be any independent presentation of content and time structure.
- ▶ **Pioneering instruments able to deliver comprehensive quality assurance:** Sophisticated training planning tools offer the potential to cover all four phases (plan-do-check-act) of the European Quality Assurance Reference Framework for Vocational Education and Training (EQAVET) (cf. COUNCIL OF THE EUROPEAN UNION 2020). The same goal can be achieved via the deployment of different planning and feedback instruments which are used in parallel or consecutively (see Table 7).
- ▶ **Large companies tend to use differentiated planning documentation:** Companies offering training in the cross-sectional occupation of office manager are somewhat larger in size than the average company providing training. The bigger the company providing training, the higher the tendency to use formal instruments will be. The study shows, for example, that companies which work with content training plans are more likely to deploy or make better use of further planning instruments.
- ▶ **Training staff enjoy a high degree of autonomy:** As far as the specific company-based implementation of training contents is concerned, the staff responsible for delivering training are largely left to their own devices and given the freedom to draw upon their experience. At companies with a training management department, their range of action ends at the threshold to the operating departments. Although the task of drawing up planning documentation is shared, it is incumbent on the training manager and on the skilled workers delivering training in the operating departments to decide whether and how occupationally-specific competencies are successfully imparted. This is remarkable given the simultaneously prevailing awareness that company implementation of the training regulations constitutes a major challenge for reasons including their complexity.
- ▶ **Companies are seeking to offer comprehensive training:** The fulfilment of stipulated training standards is the priority training objective at many of the companies being investigated. The defined training standards are merely viewed as minimum benchmarks which companies may exceed. Training goals are also supported by further pedagogical and vocational motivations and considerations. The evaluations showed that both the design and use of plans reflect company values and guiding principles in respect of what is perceived as being good training.
- ▶ **All companies providing training use the training record:** This also applies to companies providing training in the occupation of office manager. Compared to the main investigation into all 18 occupations, companies providing training in the occupation of office manager achieve far better outcomes in terms of using the report booklet to manage evidence of training in accordance with the relevant BIBB Board Recommendation (cf. BIBB-HAUPTAUSCHUSS 2020). At companies which provide training in the occupation of office manager, the report booklet is significantly more likely to be checked than at other companies. This applies to all three areas of training – the craft, trade and industry, and the public sector. Aside from company size, one plausible explanation for this would be the association of the occupation of office manager with an affinity for formal planning instruments and a way of working that has its basis in planning and written documentation.

2 The study related to the training regulations for office managers of 2014. These will be replaced by a revised version of the occupation in 2025 (cf. BüroMKfAusbV 2025).

- ▶ **Too little use is being made of the opportunities offered by the report booklet:** There are currently few indications of the existence of sufficient awareness or of established practice with regard to the “intensification of communication between employers providing training and apprentices” via, as the Board Recommendation puts it, “expanded models of the statutorily stipulated training record” (BIBB-HAUPTAUSSCHUSS 2020, p. 2). This constitutes missed opportunities, especially since the training record is the most-used quality assurance instrument in practice.³
- ▶ **Greater use is being made of voluntary quality assurance instruments:** The results indicate that, compared to other occupations, training in the occupation of office manager is significantly more likely to be additionally monitored via the use of voluntary standardised instruments (such as evaluation meetings, the use of assessment forms, the conducting of reviews) which require higher planning, communication and time resources with regard to the necessity of reaching agreements and arrangements.

³ For this reason, the recommendation was issued that, taking all existing digital versions into account, the report booklet should be used as the starting point for extensive further developments which will support all training process stages by providing the necessary set of instruments for documentation, information and feedback and networking (see Recommendation 2 in: SCHREIBER et al. 2023, p. 106).

► 2 Training within the work process – background to the study

How is training planned and structured in the dual system at the company level? This is one of the key issues addressed by the research project “Planning and organising training within the context of work-based learning”.⁴ The initial assumption is that training planning is central to securing the quality of the training process. The aim is that training planning should ensure that apprentices acquire the skills, knowledge and competencies set out in the respective training regulations and that they are therefore able to obtain comprehensive occupational proficiency for their future career.

Unlike in school-organised learning environments, the company-based training is integrated into operationally-related work and business processes. This means that the plannability of the time and content of teaching-learning processes is fundamentally restricted, especially at companies which operate on the free market. On the one hand, the party providing training always has to take account of general conditions at the company when organising and structuring training, e.g. the respective human resources position and the order situation. On the other hand, the actions of companies providing training are governed by legal stipulations such as training regulations which are applicable nationally. Reconciling the economic, strategic and organisational requirements of the respective company with the legally binding training standards represents a balancing act for the companies. This particular challenge calls for a high degree of flexibility and circumspection on the part of all those involved with training.

Because the question of how companies plan and shape their training processes whilst maintaining the minimum legal standards has not yet been investigated as a distinct field within the context of vocational education and training research, the aim of the stated research project was to cast more light into the “black box” of the planning and structuring of training by companies (cf. SCHREIBER et al. 2023, p. 11). Qualitative and quantitative surveys relating to 18 occupations were conducted in order to achieve this objective. The results were published in 2023 (cf. SCHREIBER et al. 2023).

The present study has its origins within the context of this research project. It also investigates how companies plan and structure their training services on the basis of data material generated within the scope of the main study. However, the study relates solely to the occupation of office manager. In contrast to the main study, the investigation was primarily conducted under the heading of quality assurance.

Regulatory work, i.e. the development or modernisation of training and further training regulations carried out under the lead management of BIBB in conjunction with the social partners, may be categorised as a core element of quality assurance in vocational education and training. The German Reference Point for Quality Assurance in Vocational Education and Training (DEQA-VET) is part of the EQAVET Network at a European level. The EQAVET Network has been addressing the topic of vocational education and training and quality assurance in a coordinated fashion since 2009. Over recent years, DEQA-VET has constantly drawn attention to the relevance of regulatory instruments for quality assurance in vocational education and training. One of the vehicles it has used for this purpose is an information brochure which is now available in four languages (cf. FEDERAL INSTITUTE FOR VOCATIONAL EDUCATION AND

⁴ For further information on the research project, see SCHREIBER et al. (2023).

TRAINING 2017). The aim here was to serve the interests of improved transparency, as was most recently urged in the Council Recommendation of 24 November 2020 on vocational education and training for sustainable competitiveness, social fairness and resilience (cf. COUNCIL OF THE EUROPEAN UNION 2020, Paragraph 18).

The research project “Planning and structuring training within the context of work-based learning” was a cooperative endeavour between DEQA-VET and the department responsible for regulatory work, in which the latter assumed a lead management role. This collaboration was reflected in the main study in Chapter 7 in particular (“Quality assurance instruments in the training process”) and also in the present study, in which the object of investigation of the planning and structuring of training is primarily viewed and analysed through the “lens” of quality assurance.

Why was the focus placed on the occupation of office manager for this study? This occupation is especially suited to comparative analyses because it is a cross-sectional occupation in which training takes place in all areas of training included in the study, i.e. in the crafts, in trade and industry, and in the public sector.⁵

The quantitative significance of this training occupation constitutes a further fundamental reason. The occupation of office manager is one of the occupations with the highest number of newly concluded training contracts.⁶ The content-rich material relating to the occupation in the form of qualitative interviews and quantitative data permitted a further and more detailed evaluation.

The investigation below looks in particular at how training is planned, implemented and monitored in the selected training occupation, at which quality assurance instruments and procedures are used, and at how these are deployed. We thus specifically define whether and how training plans are drawn up in writing and which shape and form they exhibit and also identify the approach adopted towards the stipulated instrument of the report booklet. As was confirmed over the course of the investigation, mandatory planning and implementation instruments such as the report booklet or the company training plan are not, however, the only instruments which help to ensure professional competency acquisition and therefore also serve the purpose of quality assurance. Further procedures and measures are deployed alongside these mandatory instruments at the training venue of the company. Instruments for monitoring training progress are, for example, examined more closely.

This publication is set out as follows. After an explanation of the basic methodological principles (Chapter 3) and following information about the occupation of office manager (Chapter 4), we commence with an investigation of the use of the company training plan (Chapter 5.1) and of the report booklet (Chapter 5.2) in training practice for the occupation of office manager. These planning and structural standards for training are stipulated in legislation and are therefore of particular relevance to the investigation. In accordance with the project goal, the aspects of planning and quality assurance are examined in greater detail on the basis of three example case studies (“Special focus”, pp. 31 ff.). The remarks on training planning are supplemented by discursions on the topics of “Autonomy and areas of responsibility in training planning” (pp. 43 ff.) and “Reasons for the specific structuring and use of content training

⁵ See also SABBAGH (2020).

⁶ In 2019, the year in which the case studies were conducted, 26,000 newly concluded training contracts were recorded for the occupation. At the time of the telephone survey, which took place between April and September 2020, 23,000 newly concluded contracts were in force. These figures represented the second highest (2019) and the highest (2020) number of new training contracts in the dual system of vocational education and training. (See also: evaluation of the Trainee Data System – Datensystem Auszubildende (DAZUBI) for the training years 2019 and 2020).

planning” (pp. 45 ff.). A closer consideration will subsequently be undertaken of the deployment of further quality assurance instruments and of procedures which may be categorised as voluntary quality assurance performance by the companies (Chapter 6).

► 3 Methodological indications

This study relates exclusively to the training occupation of office manager and is therefore based on 13 of the 45 qualitative interviews and on 238 of the 1,343 quantitative telephone interviews which were conducted within the scope of the research project “Planning and structuring training within the context of work-based learning”. The respondents were persons who are responsible to differing degrees for the training of office managers at their respective companies (training manager and staff providing training).⁷ Their responses were evaluated accordingly for the investigation.

The companies surveyed quantitatively are considered in terms of the dimensions of “company size” and “area of training” (see Table 1). The three areas of training are crafts, trade and industry, and the public sector. Company sizes are mapped via the number of employees. They are divided into the smallest category of company with up to ten employees, small companies with up to 49 employees, medium-sized companies with between 50 and 249 employees, and large companies with 250 and more employees.

Table 1: Company size by area of training (in %)

Company size	Crafts	Trade and industry	Public sector	All areas of training
Smallest category of company (fewer than 10)	10 (37)	5 (4)	2 (0)	5 (26)
Small company (10 to 49)	42 (45)	21 (18)	6 (7)	22 (41)
Medium-sized company (50 to 249)	42 (15)	38 (37)	42 (43)	40 (21)
Large company (250 and more)	6 (4)	36 (41)	50 (50)	33 (12)

Note: values in brackets refer to companies which provide training in the 18 selected occupations.

The average duration of the qualitative interviews was one hour.⁸ The transcription files were imported into MAXQDA and coded using a uniform category scheme for the purpose of further analysis. Evaluation followed qualitative content analysis guidelines in accordance with Philipp MAYRING (1997). Mayring (1999) differentiates three basic forms of the content analysis approach. These are summary, explication, and content structuring. The research project opted for content structuring because the intention was to emphasise and define certain contents from the interviews. To this end, a category system closely aligned to the interview guide was developed and supplemented on the basis of the material.

The qualitative interviews are also distributed across the three areas of training of crafts, trade and industry, and the public sector. In the case of the public sector, they relate to the three levels of federal government, federal state government and local government authority.

⁷ For further information on the formation of the samples, on the selection of the training occupations and on the implementation of the surveys, cf. SCHREIBER et al. (2023), pp. 15–20.

⁸ Average duration of the interviews was 64 minutes. Individual interviews ranged in length from 36 to 99 minutes.

The distribution of company or government authority size which emerges for the qualitative interviews is small: 1 interview (10 to 49 employees); medium-sized: 3 interviews (50 to 249 employees); large: 9 interviews (250 employees and more). The interview period extended from April to August 2019.

The 238 quantitative telephone interviews, which were also conducted with training management departments and training staff, were distributed across the areas of training as follows: 50 interviews in crafts, 136 in trade and industry, and 52 in the public sector. The survey took place between April and September 2020. It thus coincides with the first wave of the COVID-19 pandemic immediately after the introduction of the contact ban and further national measures and also encompasses the period when restrictions were gradually eased. Most companies, however, were interviewed between June and August 2020. We cannot exclude the possibility that there may have been a small number of refusals to participate on the part of training management departments at companies which were particularly badly affected. Categorisation of the companies by size and by areas of training in the overall survey reveals a disproportionately high share of small companies in crafts and of larger companies in the public sector (see Table 1).

A comparison with the size distribution in the overall survey⁹ also makes it clear that focusing on companies which train office managers leads to a shift to larger companies. This is very apparent in crafts, where 37 percent of companies in the smallest category provide training in one of the 18 selected occupations for the main survey but only ten percent of companies in this category provide training in the occupation of office manager. Companies in crafts which employ their own staff to perform the relevant tasks and which also offer training in this occupation are usually larger than companies in crafts in general. In other areas of training, this difference between companies that train office managers and companies that train other professions is very much smaller.

⁹ If any reference is made below to all interviews or case studies conducted within the scope of the research project (45 qualitative interviews and 1,343 quantitative telephone interviews), then the term "overall survey" will be used to denote this.

► 4 Office manager – a brief presentation

The specific features and general conditions appertaining to the training occupation of office manager will firstly be outlined below. The occupational profile itself and typical tasks and task areas will be addressed alongside indications regarding the relevance of this occupation in the dual training system in Germany and its distribution across the areas of training.

The occupation of office manager is a three-year training occupation. From a quantitative point of view, it may be designated as a “female occupation”. 72 percent of new entrants in 2017 were women (cf. Datensystem Auszubildende, DAZUBI). The occupation is predominantly chosen by apprentices with an intermediate secondary school-leaving certificate (46 percent) and by apprentices in possession of an university of applied sciences or general higher education entrance qualification (42 percent) (cf. Datensystem Auszubildende, DAZUBI). Differentiating by areas of training, higher level school-leaving qualifications are particularly prevalent in the public sector, whereas medium level qualifications dominate in the crafts sector (56 percent), where the percentage of apprentices with a lower secondary school-leaving certificate reaches double figures.

When the occupation was comprehensibly updated in 2014, the occupations of specialist in office communication, office management clerk, and commercial clerk for office communication were merged to form a new training occupation (cf. ELSNER/KAISER 2014). A further revision of the Ordinance on vocational education and training in the occupation of office manager will enter into force in 2025 (cf. BüroMKfAusbV 2025).

The occupation contains ten elective qualifications (see information box). Two of these must be chosen and stipulated in the training contract at the commencement of training. Duration of training in each of these is five months.

The occupation of office manager is a commercial occupation. Commercial occupations are a defining component of the dual system of vocational education and training in Germany. There were 22,833 newly concluded training contracts¹⁰ in the occupation of office manager in 2020. This makes it one of the “major” occupations. The occupation of office manager is the second most popular commercial occupation after the occupation of management assistant for retail services (24,672 newly concluded training contracts in 2020¹¹). It is significantly ahead of the occupation of industrial clerk (14,343 new contracts in 2020¹²) (cf. Datensystem Auszubildende, DAZUBI).

Figure 1 shows newly concluded training contracts in the occupation of office manager from 1993 to 2023. Their number declined by a quarter over the last decade (2010 to 2019). This means that the decrease was significantly sharper over this period than for the dual VET system as a whole, which saw a drop of just over six percent (cf. BUNDESINSTITUT FÜR BERUFSBILDUNG 2021, p. 38; own calculations). The updating of the occupation in 2014 is highly unlikely to be the reason for this since the decrease set in significantly earlier. Possible explanations could include lower requirements because of digitalisation or, in addition to this,

10 22,638 new training contracts were concluded in 2023, of which 18,966 were in trade and industry, 3,195 in crafts, and 477 in the public sector. 16,089 new contracts were with women, representing a proportion of 71 percent.

11 There were 21,126 newly concluded training contracts in the occupation of management assistant for retail services in 2023.

12 16,149 new training contracts were recorded for 2023 in the occupation of industrial clerk.

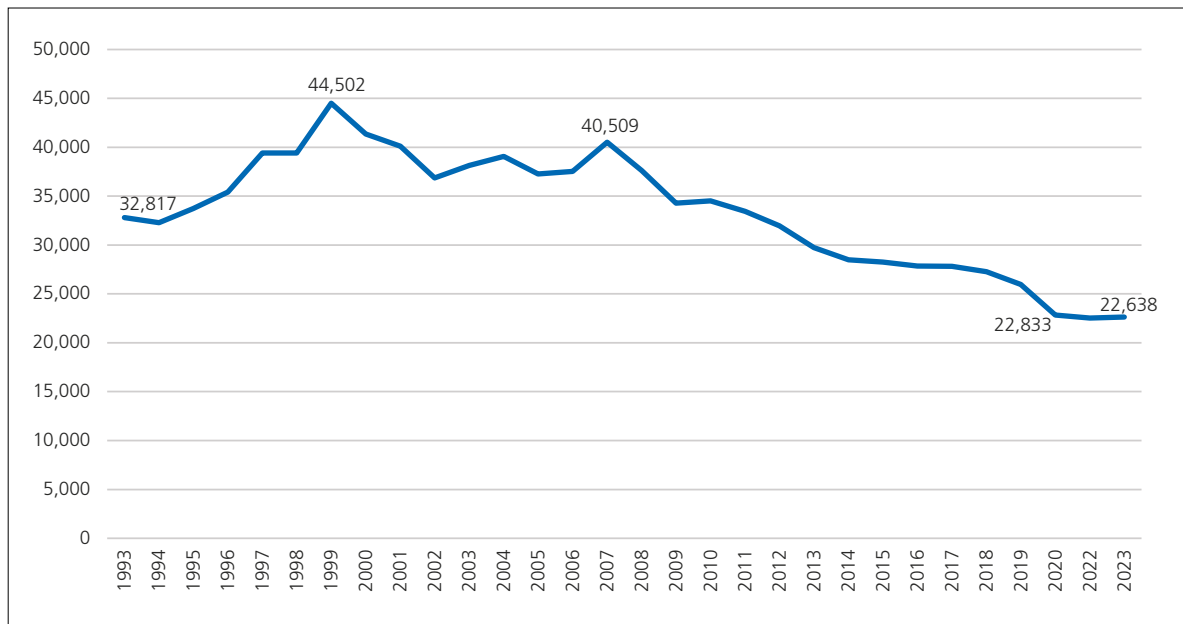
specialisation in occupations such as management assistant in e-commerce or the aspiration to achieve academic qualifications instead (cf. VON DEM BACH et al. 2022).

Information box: Elective qualifications in the occupation of office manager

Elective qualification	Explanation
1. Order management and coordination	▶ Order initiation ▶ Order processing ▶ Order completion ▶ Order follow-up
2. Commercial management and control	▶ Financial accounting ▶ Cost and performance accounting ▶ Controlling
3. Commercial processes in small and medium-sized companies	▶ Ongoing bookkeeping ▶ Payroll ▶ Business costing ▶ Business assessment
4. Procurement and logistics	▶ Needs assessment ▶ Operational procurement process ▶ Strategic procurement process ▶ Warehouse management
5. Marketing and sales	▶ Marketing activities ▶ Distribution of products and services ▶ Customer retention and customer support
6. Human resources management	▶ Human resources administration ▶ Human resources acquisition and development
7. Support and secretarial tasks	▶ Secretarial management ▶ Appointment scheduling and correspondence ▶ Organisation of trips and events
8. Public relations work and events management	▶ Public relations ▶ Events management
9. Administration and law	▶ Customer and citizen-based approach ▶ Application of the law ▶ Administrative action
10. Public financial management	▶ Finance ▶ Budget and cash management

Source: § 4 Paragraph 3 BüroMKfAusbV 2013

Figure 1: Newly concluded training contracts in the occupation office manager from 1993 to 2023



Source: *Datensystem Auszubildende (DAZUBI)*, status 11. 9. 2024; 1993 to 2013: total predecessor occupations

The decrease in newly concluded training contracts (see Figure 1) in the occupation of office manager has been accompanied by a rise in the contract dissolution rate from 18.5 percent in 2006 to 23.8 percent in 2020¹³ (cf. *Datensystem Auszubildende (DAZUBI)*). This figure is slightly below the average for vocational education and training as a whole (cf. *BUNDESINSTITUT FÜR BERUFSBILDUNG 2022*, p. 141).¹⁴ In the case of office managers, the proportion of new entrants achieving a qualification in their original occupation is just over 80 percent (cf. *Datensystem Auszubildende (DAZUBI)*, own calculation). This figure is within the usual range for occupations regulated by the chambers of industry and commerce.

Office manager is a pronounced cross-sectoral occupation, and training takes place in all areas (crafts, trade and industry, public sector). This constitutes a particular characteristic of this training occupation and is something which permits a comparison of the training systems between areas. Account needs to be taken of the fact that the areas of training differ with regard to aspects such as company size (cf. Table 1). Companies in the crafts sector which provide training have fewer employees than companies offering training in the other areas of training. This also applies to the occupation of office manager, although the difference is not as great as in the other training occupations included in the main study “Planning and structuring training within the context of work-based learning”. This is important here because the research project has already revealed that many processes run significantly more formally at larger companies than at smaller ones and that larger companies make greater use of formalised instruments for the planning (cf. *SCHREIBER et al. 2023*, p. 31 f.) and for the structuring of training (cf. *SCHREIBER et al. 2023*, pp. 53 ff.). A distinction thus needs to be drawn between “genuine” differences between the areas of training and differences which simply have their basis in varying size structures.

Although the occupation of office manager is offered in all areas of training, its main focus clearly lies in trade and industry. Just under 23,000 new training contracts were concluded

¹³ In 2023, the contract termination rate for this occupation was 29.3 percent.

¹⁴ In 2022, the most recent year that is available, the drop-out rate in dual vocational education and training was 29.5 percent (cf. *BUNDESINSTITUT FÜR BERUFSBILDUNG 2024*, p. 152).

in 2020. These were distributed across the three areas of training as indicated in Table 2. The occupation of office manager is an important training occupation in the public sector within the dual system (there were a total of 19,014 newly concluded training contracts in this area of training in 2020 (cf. BUNDESINSTITUT FÜR BERUFSBILDUNG 2022, p. 98).

Table 2: Newly concluded training contracts in the occupation of office manager in the year 2020

Area of training	Number	Percentage
Trade and industry	19,014	83.3
Crafts	3,321	14.5
Public sector	498	2.2
Total	22,833	100.0

Source: Datensystem Auszubildende (DAZUBI), status 10.10.2023, own calculations; not including new contracts which were dissolved within the first calendar year

Office managers work at companies in virtually every economic sector. They may also be employed in public administration and by associations, organisations and lobbying groups. They organise and process office-based tasks. They also perform commercial tasks in areas such as order processing, procurement, accounting, marketing and human resources management (cf. BUNDESAGENTUR FÜR ARBEIT n. d.).

The core tasks of an office manager comprise the following.

- ▶ Perform organisational and commercial management tasks
- ▶ Deal with written correspondence
- ▶ Design presentations
- ▶ Procure office materials
- ▶ Schedule and monitor appointments
- ▶ Prepare meetings
- ▶ Arrange business trips
- ▶ Assist with human resources deployment planning
- ▶ Purchase external services
- ▶ Support customers
- ▶ Assist with the processing of orders
- ▶ Write invoices
- ▶ Monitor incoming payments

Office managers employed in the public sector help citizens to submit applications. They also clarify concerns and areas of responsibility and are involved in the preparation of budgets and business plans (cf. BUNDESAGENTUR FÜR ARBEIT n. d.). For this reason, the elective qualifications 9 (Administration and law) and 10 (Public financial management) are mandatory for training programmes in the public sector.

The all-round deployability of office managers means that they collaborate with their colleagues in multifarious ways. Upon completion of training at small companies, such as in the crafts sector, they are frequently the only commercial employees alongside a technically- and

industrially-oriented team. At large trade and industry companies, by way of contrast, they often work in departments containing many other commercially trained (office) administrative members of staff and may have direct dealings with executive managers, with heads of department or with scientific researchers working across a wide variety of specialisms.

► 5 Quality assurance via binding standards

Now that some categorical information regarding the specific training conditions for office managers has been imparted, this chapter will present the results of an investigation into the quality assurance activities conducted by the companies within the scope of their training activities for this occupation. These activities relate directly to mandatory requirements and standards for companies providing training, namely the company training plan and the training record. Furthermore, additional quality assurance instruments which are deployed in training but not directly connected to the standards set will be presented in Chapter 6.

One of the outcomes of the main investigation “Planning and structuring training within the context of work-based learning” is that robust quality assurance in the training process exerts a positive impact on the training result in the form of better marks. It is important to note in this regard that individual instruments had only a limited effect. The reason for the success was the totality of the instruments used (cf. SCHREIBER et al. 2023, p. 102). This indicates that the use of training plans as part of a comprehensive system for the quality assurance and quality development of training processes could have a positive influence in terms of the successful completion of training programmes (cf. SCHREIBER et al. 2023, p. 10).

A consideration of the figures relating to the occupation of office manager ascertained within the scope of the aforementioned research project shows more favourable values with regard to input and output characteristics compared to all 18 occupations in the main study (see Table 3).

Input factors include responses made by employers providing training to “Difficulties of recruitment” and “Deviations from requirements”. The latter refers to the degree of fulfilment of company requirements exhibited by apprentices prior to the commencement of training. “Drop-out rate” and “Marks in final examination” were included as output characteristics.

With regard to the input characteristics and comparing companies providing training in the occupation of office manager to the average of all companies surveyed, the former report fewer difficulties in finding apprentices for this occupation (mean values 2.6 to 3.4 on a scale from 1 to 5). In the case of this characteristic, there are virtually no differentiations in relation to the three separate areas of training (crafts, trade and industry and public sector).

Table 3: Input and output characteristics by area of training

Input and output characteristics	Crafts	Trade and industry	Public sector	All areas of training	Total (18 occupations)
Difficulty of recruitment* (average)	2.6	2.7	2.6	2.6	3.4
Deviation from requirements (in %)	18	16	10	15	30
Drop-out rate (in %)	11	7	2	7	16
Marks in final examination (average)	2.3	2.1	2.1	2.1	2.6

Note: small values denote favourable characteristic.

** Difficulty of recruitment: scale from 1 to 5*

More significant differences are revealed in the case of the second input characteristic, namely deviation from the requirements companies place on apprentices prior to the commencement of training. 15 percent of apprentices in the occupation of office manager do not meet the requirements stipulated by the companies surveyed. The figure for office managers in the crafts sector is somewhat higher at 18 percent. By way of contrast, the corresponding figure for the public sector is only ten percent, well below the overall average for this occupation. To present a comparison, 30 percent of companies surveyed in the project as a whole across all 18 occupations considered stated that apprentices failed to meet requirements.

The values for the two output characteristics used, “Drop-out rate” and “Marks in final examination”, also point in the same direction.

With regard to training drop-out, the differences compared to the overall survey are actually even somewhat larger. The drop-out rate for all 18 occupations surveyed is 16 percent. This contrasts with a figure of only seven percent in the occupation of office manager.¹⁵ The drop-out rates for office managers in the crafts and in trade and industry are eleven and seven percent, respectively. In the public sector, the figure is as low as two percent.

Office managers also perform at an above-average level in respect of final marks. The differences between the areas of training are quite slight in this instance. The average mark achieved in final examinations in the crafts sector (2.3 on a scale of 1 to 6) is a bit worse than the marks awarded in the other two areas of training (2.1).

As is the case in all training occupations in the dual system, mandatorily stipulated standards aimed at securing the quality of training are in place at the company level. These include company training planning and the training record (also referred to as the report booklet). The following sub-chapters will examine how these are specifically deployed in practice.

5.1 Company training planning

The primary purpose of training planning is to structure the training process in terms of content and time in order to ensure the imparting of occupational proficiency (see in particular § 14 Paragraph 1 BBiG). The relevant legislation further requires this planning to be presented and incorporated in the written training contract (see § 11 Paragraph 1 BBiG). Written training planning is thus an indispensable component of the training contract and a prerequisite for the inclusion of a contract in the Index of Vocational Education and Training Contracts managed by the respective competent body.

The BIBB Board Recommendation of 28.03.1972 goes into greater detail in addressing the minimum requirements for the training planning to be prepared by a training centre:

“The employer providing training is required to use the general training plan pursuant to § 25 BBiG or § 25 HwO as a basis for drawing up a training plan which is adapted to company and individual circumstances and which sets out both the content structure and the time sequence of the vocational education and training.” (BIBB-HAUPTAUSSCHUSS 1972, p. 1)

¹⁵ Cf. the national contract dissolution rate of 23.8 percent, which is stated for office managers on page 11. It should be noted that a contract dissolution rate does not equate to training drop-out (as formulated in the questionnaire for this study). The former may, for example, involve a switch to a different training occupation either within or outside the original company providing training. The reasons for the large discrepancy in the figures could also lie in the sample used for the research project. It is conceivable that companies offering a high level of training quality and which therefore exhibit lower drop-out rates may be more likely to wish to take part in a survey for a research project.

It goes on to state: “Insofar as training regulations [...] are in place, the contents of the general training plan may also be used as the basis of the training plan” (BIBB-HAUPTAUSSCHUSS 1972, p. 1).

Against the background of this possibility set out in the recommendation, companies may decide whether to draw up a company training plan to act as a foundation for training or whether simply to append the general training plan from the training regulations to the written training contract (cf. SCHREIBER et al. 2023, p. 12).

The law facilitates a further option via the vehicle of the Crafts Code (HwO). The stipulations of the HwO differ from those set out in the Vocational Training Act (BBiG) with regard to the need for a written contract. It affords companies the right to make reference to preceding training contracts as long as they have already conducted a training programme governed by the same legal foundation.¹⁶

One material aspect is that the duty to draw up a company training plan is established and governed within the context of the conclusion of a contract between the company providing training and the apprentice. The aim is for this to serve as a vehicle for the creation of transparency between the contractual parties with regard to the goals and contents of training. Gaining legal certainty by appending the respective training regulations/general training plan to the training contract may therefore be an obvious approach for companies to adopt. At the same time, possibly equating the general training plan with the company training plan may subvert the objective of achieving transparency because there is no mandatory legal obligation to set out how a specific company wishes to meet the stipulated goals and to impart the required contents (cf. SCHREIBER et al. 2023, p. 13). This needs to be viewed against the background that, in entirely general terms, the relevant legislation accords the training party considerable leeway in the structuring of training planning as long as the learning objectives listed in the respective training regulations are achieved during the training and as long as the time stipulations are adhered to.

5.1.1 The four categories of company training planning

The results of the research project “Planning and structuring training within the context of work-based learning” confirm that companies providing training avail themselves considerably of the leeway they are accorded for training planning. The spectrum ranges from non-written implicit planning concepts of greater or lesser transparency to content-based training plans prepared in a differentiated manner which, as we shall see, can be used as building blocks in superordinate multifunctional planning and implementation tools. This broad portfolio can be roughly sub-divided into written (formal) and non-written planning.

In the telephone survey of a total of 1,343 companies providing training in 18 selected dual training occupations, which formed part of the main investigation, the four possible answers listed in the column “Item” in Table 4 were read out to respondents. The idea was for them to allocate their own planning approach to these items.¹⁷

¹⁶ § 30 HwO stipulates: “Reference may be made to a company training plan pursuant to § 11 Paragraph 1 Clause 2 No. 1 of the Vocational Training Act to the extent that such a company training plan is already available to the competent body”. For further background information and evaluations, see SCHREIBER et al. 2023, p. 11 f.

¹⁷ The remaining remarks in this sub-chapter follow the presentation in SCHREIBER et al. 2023, p. 28 f.

Table 4: Categories of training planning and operationalisation

Category	Designation	Item
1	Situative planning	Training is derived from company orders.
2	Informal planning	We ensure that apprentices are able to familiarise themselves with all tasks that form part of their training occupation but we do not have a written plan in place.
3	Time planning	We have a written transfer or deployment plan containing times for all the departments or company areas in which experience will be gained during training.
4	Content planning	We have a written training plan in which training contents are listed.

Category 1 (situative planning) represents companies at which training primarily results from daily operational processes. The focus in this case is on operational organisation of the processing of orders, from which the training procedures result. Conceptual or didactic considerations therefore play a subordinate role and may indeed have no part at all. Idiomatically speaking, this could be referred to as a “watch and learn apprenticeship”.¹⁸ Learning opportunities, the object of training, and further general conditions all have their origins in company processes. Important aspects of the training are decided situatively.

Category 2 (informal planning) encompasses companies which ensure that all material training contents making up the training occupation are taken into account during the process of training. Conceptual and didactic considerations may play a larger role than at companies which practise a watch and learn apprenticeship. This means that companies have an implicit concept for training. However, they do not enshrine these notions in a written training plan.

Category 3 (time planning) contains companies which draw up a transfer or deployment plan. Transfer or deployment plans set out the planned procedure for training. These plans give rise to time sequences, learning opportunities, and areas of human resources responsibility. Didactic considerations are mainly linked to time-related and organisational aspects. A transfer or deployment plan consists of a written document.

Category 4 (content planning) comprises companies which prepare written training planning. Training contents are recorded in this planning document. The documents in question range from plans which merely constitute a bullet point list of occupational positions from the respective training regulations to more detailed documents which include the company's interpretation of the individual positions in the form of formulated tasks and objectives and didactic and pedagogical stipulations. They may also be integrated into quality management systems. Viewed in this way, it is therefore possible to conceive the first two categories as non-written and the latter two as written (= formal) training planning.

5.1.2 Quantitative evaluations of the types of company training planning

In the main study “Planning and structuring training within the context of work-based learning”, these four categories (see Table 5) were read out to all 1,341 companies as part of the telephone survey. Although companies were able to allocate themselves to more than one cat-

¹⁸ “A ‘watch and learn apprenticeship’ means that apprentices are integrated into the company's work and business processes alongside qualified skilled workers, supervisors or works foreman and acquire the typical professional competencies of the trade via observation, imitation and practice” (cf. BOSCH/HÜTTENHOFF 2022, p. 223).

egory, only the higher category was evaluated in each case. Table 5 shows the allocation to the categories of the companies surveyed.

Table 5: Frequency of types of training planning (all 18 occupations, main study: telephone survey)

Category	Designation	Number	Percentage
1	Situative planning	40	3
2	Informal planning	515	38
3	Time planning	116	9
4	Content planning	670	50

Multiple responses, N = 1,341

The table for the survey as a whole shows that 50 percent of the companies use a written training plan which takes account of the training contents. A further nine percent plan the scheduling of training by means of a transfer and deployment plan. 38 percent of the companies stated that they plan the execution of training informally. Three percent of companies use situative planning. This means that 59 percent of the 1,341 companies surveyed plan their training in writing and that 41 percent have no written documents in place (see Table 5).

A consideration of the responses of the 238 companies which provide training in the occupation of office manager produces the following picture.

Table 6 first displays the distribution of responses, including multiple responses from companies which provide training in the occupation of office manager. All categories except informal planning of training were chosen by at least 60 percent of the respondents. The final two columns of the table mirror the main study by stating the distribution of responses following a recoding in which only the highest category was taken into account in each instance (cf. SCHREIBER et al. 2023, p. 29). This means that the proportions of the new distribution add up to 100 percent. Companies which, for example, describe their training both as a component of company processes (category 1 “situative planning”) and as taking place in accordance with a deployment plan are now allocated to Category 3 (“time planning”). This especially thins out the lowest category (situative planning). The category of “time planning”, however, also diminishes because around two thirds of companies with a deployment plan base their training on a written training plan and are thus now allocated accordingly. Following the recoding, the relevant content planning category accounts for a dominant 61 percent of the distribution. It is followed by the category of companies with a deployment plan (time planning, 22 percent, and companies with an informal training concept, 15 percent). Planning determined by company processes (situative planning) accounts for only two percent. In terms of the survey, this means that 83 percent of the companies providing training for office managers plan their training in written form. 17 percent do not use the written form.

Table 6: Frequency of types of training planning for the occupation of office manager

Category	Type of planning	Original data (including multiple responses)		Allocation to the highest response category	
		Number	Percentage	Number	Percentage
1	Situative planning	164	69	4	2
2	Informal planning	37	16	35	15
3	Time planning	168	71	53	22
4	Content planning	145	61	145	61

Multiple responses, $N = 238$

The aim now is to take a differentiated view of the types of planning in accordance with the three areas of training of the crafts, trade and industry and the public sector (see Figure 2). It is revealed that training on the basis of a content training plan takes place in all areas of training. The spectrum ranges from 56 percent in the crafts sector to 71 percent in the public sector. Deployment plans are comparatively rare in the crafts sector, only featuring in 14 percent of cases. This comes as little surprise given the size structure of the crafts sector. A total of 30 percent of companies in the crafts sector undertook non-written planning. The corresponding proportion in the public sector was only six percent.

Compared with the overall survey, in which the proportions of companies stating written and non-written planning were 59 percent and 41 percent, respectively, companies providing training in the occupation of office manager are significantly more likely to use formal or written training planning. As already presented above, the figure in this regard is 83 percent (see Table 6).

A consideration of the types of planning by areas of training shows that training in the occupation of office manager is more formal in the crafts sector (70 percent, see Figure 2) than in the case of all occupations investigated (45%, cf. SCHREIBER et al. 2023, p. 30). The other areas of training exhibit virtually no deviations in the distribution of types of planning if figures are considered both for the occupation of office manager (see Table 6) and for all occupations forming the object of investigation (see Table 5).

The evaluation of the 13 qualitative interviews¹⁹ permits further and more detailed insights into the structuring of the plans and into the motivations behind this.

In the qualitative interviews with training managers and skilled workers providing training, the methodological approach was to make a targeted enquiry as to whether training in the occupation of office manager takes place on the basis of a written training plan drawn up at the training centre. If the response to this question was yes (11 of 13 interviews), the aim of the subsequent questions was to gain as much detailed information as possible on the contents and forms of plans and on how the training plan had originated. Planning documentation was provided in anonymised form in four of these interviews.

This means that 85 percent of the 13 companies interviewed conduct their planning in writing, i.e. formally (0102, 0113).²⁰ This figure is approximately the same as the 83 percent recorded in the telephone survey of companies providing training in the occupation of office

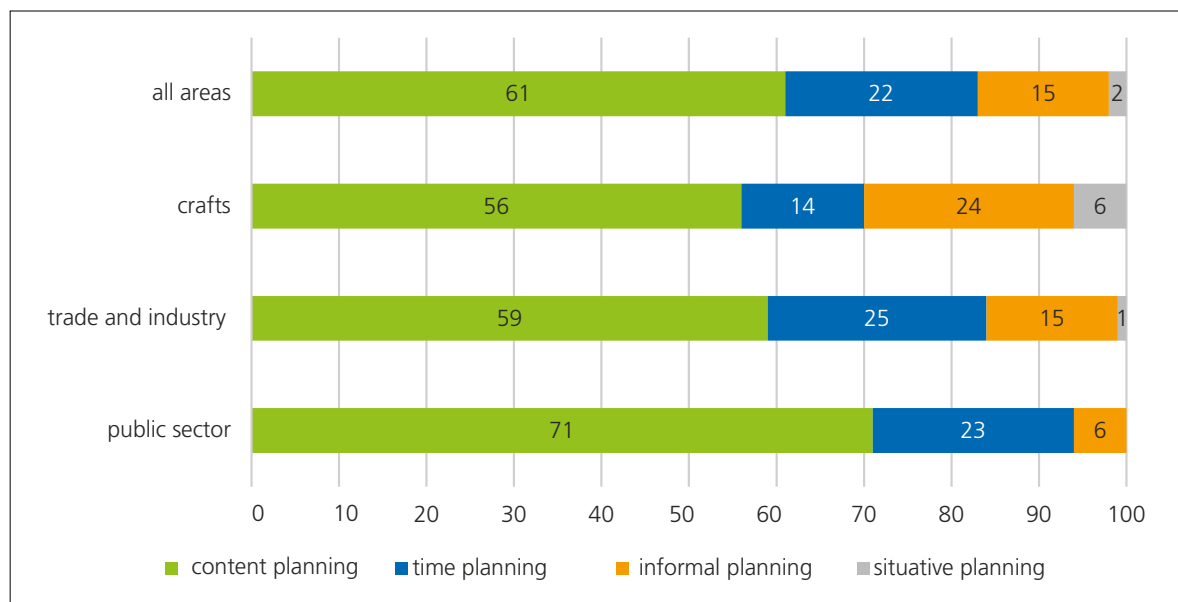
19 The distribution of company or government authority size for the 13 interviews was small: 1 (10 to 49 employees); medium-sized: 3 (50 to 249 employees); large: 9 (250 or more employees).

20 The figures in brackets are codings for the qualitative interviews.

manager (see Figure 2). Companies offering training in the occupation of office manager which carry out formal planning also predominate in the qualitative survey.

We will initially continue by undertaking a closer consideration of the non-written and then of the written or formal training planning of the 13 companies providing training in the occupation of office manager which took part in the 13 qualitative interviews.

Figure 2: Types of planning by areas of training (in %, office managers only)



N = 238

5.1.3 Qualitative evaluations of the types of company training planning

5.1.3.1 Training with non-written planning

We will begin by looking in more detail at the two companies providing training in the occupation of office manager which stated during the qualitative interviews that they managed without using explicit written planning. This means that neither company uses a deployment plan (time planning) or a content training plan (content planning). These are two companies in the crafts sector. One can be categorised as small, whilst the other is a medium-sized company by dint of its 110 employees.

In both interviews, further discussions focused on finding out the extent to which the imparting of all prescribed training contents was ensured. Within this context, enquiries were also made on the role of the training regulations in training planning.

One small electrical company stated:

“If I’m entirely honest, I always go through every paragraph of the contract when we recruit an apprentice but we don’t look at the training regulations. So, in our day-to-day dealings, they are actually of no significance”. (0102, 57)

The interviewee explained that the formal provisions within the context of recruitment, namely the training contract and an explanation of it, acted as a starting point for a discussion on how rights and duties are distributed and described. To this extent, this is an indication of a

type of informal planning (category 2). In other words, the company is mindful that legal stipulations for the training occupation are adhered to within the process of training, even though this implicit concept is not recorded in a written training plan (see Chapter 5.1.1). In this specific instance, according to the information given, the general training plan does not play any part. On the face of things, this is remarkable.

During the course of the interview with the training management department at the electrical company, it further becomes clear that the intention is for the imparting of all prescribed training contents essentially to be ensured via ongoing networking with the parties involved.

“Yes, we’re always talking. It’s in everyone’s interests for training to get done, regardless of whether they are staying with the company or not. That means that we are all involved with the topic. We are all looking at how training is progressing”. (0102, 18)

The phrase “we are all involved with the topic” firstly shows that training is conceived as being a joint task. Secondly, it demonstrates a prevailing self-perception that sufficient expertise is available in order to carry out a competent assessment of the development of training success and then to act accordingly.

“The colleagues who work with the apprentices see that work has been completed successfully. Successful completion of work forms the basis for allocation of the next task, and if work has not been completed successfully, then the same task unfortunately needs to be performed again”. (0102, 14)

This represents a description of the pedagogical and didactic concept of repetition, which is deployed when apprentices are unable to complete work tasks satisfactorily.

As well as indicating the important collaboration with vocational school teachers, the interviewee also points to the company’s training capabilities by emphasising aspects such as the professional competence of the office supervisor, who has undergone training in the same occupation that is now being imparted.

“Our office supervisor has [...] completed this training, and she checks that everything is being covered”. (0102, 12)

A solid degree of prevailing self-confidence can thus be ascertained with regard to the small electrical company forming the object of investigation. Staff are convinced that good training is being delivered, even though there is no written planning and despite the fact that the training regulations “are actually of no significance” in day-to-day dealings (see above). This view has its foundations in the clear notion that all parties involved are networking on an ongoing basis and that there is sufficient expertise and know-how to ensure that the necessary competencies, knowledge and skills are imparted.

A medium-sized bakery, which is also training one office manager and several bakers and pastry cooks, does not develop or use any written planning documentation either. In this case, the interview statements point to situative training planning (category 1). In the case of situative planning (cf. Chapter 5.1.1), training is primarily derived from daily company procedures. This means that the focus in this case is on operational organisation of the processing of orders, from which the training processes result.

In response to the question as to how the imparting of all necessary training contents is ensured, the interviewee pointed to aspects such as the general training plan whilst also admitting in the same breath to having only “skimmed through” this. The interviewee’s further com-

ment that the training plan is an important subject of self-study for the apprentices so that they themselves are able to monitor the completeness of the training contents to be imparted and can demand that this should take place if necessary, could be viewed as a shift of responsibility.

“In addition, we have general training plans etc. These are in place so that we know how to manage commercial training”. (0113, 26)

“Let me put it in this way. I haven’t looked at it in detail. I’ve skimmed through it. I know what I need to teach her [...]”. (0113, 246)

“It’s really important for apprentices to look at it for themselves and to say hey, the plan contains this or that. I want to learn this too. Can anyone take the time to teach me?” (0113, 258)

Further reasons for securing comprehensive training are stated at another point in the interview. At the same time, there are indications that training is fundamentally derived from the business processes. Speaking about the current female apprentice, the interviewee says:

“[...] the situation in the office now [is], of course, that she is very close to the heart of things [...] she picks up a lot from us – yes I really think she picks up a great deal, including in all the areas. Of course, she also learns a lot from attending vocational school twice a week – or from inter-company training – [...] because of the more substantive [...] approach taken. What are you all doing in the inter-company training? A whole week is specifically devoted to a special topic [...]”. (0113, 65-67)

This interview sequence shows that the company places its trust in two aspects. There are the learning opportunities offered by the bakery as a place where many things come together (“[...] she picks up a lot, including in all the areas [...]”) and also those provided by the vocational school and the inter-company training programme. The bakery’s own perception is that planned systematic learning occurs at the venues of the school and inter-company vocational training centre rather than at the company. This justifies the company’s own situative planning in accordance with category 1. This form of non-written planning, which is primarily aligned to daily operational processes and subject to virtually no regulation via conceptual or didactic considerations, is characterised by the multifarious nature of orders during the period of training. This is acceptable from the point of view of the apprentices because contents are addressed in greater detail at the other learning venues (in this instance the vocational school and the inter-company vocational training centre).

In order to provide additional assurance that all necessary training contents are imparted, attention is paid to the marks achieved by the apprentices at the inter-company vocational training centre and in the intermediate examination (0113, 104-117). The interviewee further states that “the company [...] is to some extent a little reliant on the apprentices saying [...], hold on, I’ve not quite grasped that [...]”. (0113, 120)

This means that adjustments to the training process are initiated externally on an ad hoc basis and that quality assurance takes place reactively in this case. Poor marks issued by a third party (intermediate examination, inter-company vocational training centre courses) and explicit self-assessments by apprentices are starting points in terms of organising company support or assistance from the vocational school for the apprentice in question. By the same token, this means that ensuring the imparting of all prescribed training contents has its basis in such ad hoc instances and does not tend to form part of the implicit or planned part of the type of delivery of training.

According to the definition deployed, conceptual or didactic considerations play a subordinate role – or indeed no role at all – at companies providing training which plan situatively (see Chapter 5.1.1). Nevertheless, they are existent, as the following statement from the craft bakery demonstrates:

“[...] A few more demands are made on the apprentices depending on the degree of difficulty. They start with easy tasks, including errands etc. By the second year, they are already being allowed to bank money. So [...] the level [...] always keeps going up a bit”. (0113, 90)

This example permits a good visualisation of possible fluent transitions between the training planning categories.

5.1.3.2 Summary: Non-written training planning

The telephone survey for all 18 occupations shows that non-written training planning is less common than formal or written training planning (41 percent as opposed to 59 percent). Situative planning (category 1) may be designated as a fringe phenomenon which is more likely to be identified on an individual basis at small and crafts companies. The quantitative telephone survey revealed that only three percent of the 1,341 companies providing training conduct situative planning (category 1). For this reason, and on the basis of the definition of types of planning deployed here, we may assume that very few conceptual and didactic considerations are applied in these cases and that training emerges in a flexible manner from the daily company processes. Only 38 percent of all companies investigated plan informally (category 2). Although no written planning is in place in these cases either, the companies providing training make a conscious effort to ensure that account is taken of all knowledge, skills and competencies to be imparted during training in accordance with the training regulations.

A separate consideration of the companies providing training in the occupation of office manager shows that the proportion using informal planning is only 15 percent, a considerably lower figure. The proportion of these companies carrying out situative planning is a negligible two percent.

This picture is reinforced by the qualitative analysis of the 13 interviews of training companies offering training in the occupation of office manager. It shows that only two companies plan their training in a non-written form. Situative planning (category 1) was identified in one case and informal planning (category 2) in the second.

A comparison with the main survey permits the finding that non-written planning within the context of training in the occupation of office manager is significantly rarer than in training in the total of 18 occupations forming the object of investigation.

The reasons for this can only be a matter for speculation here. One conceivable assumption would be that the written development of planning documentation and of further materials is characteristic of the occupational profile of office managers and that moving towards written training planning is a more obvious approach than in other occupations with different occupational profiles.

It is fundamentally more difficult to gain findings regarding the “internal workings” of non-written training planning simply by dint of the fact that no written documentation is in place. Any didactic, methodological or other considerations which may have been undertaken are hard to identify and understand.

The qualitative analysis of the two company case studies provides insights into a medium-sized bakery which plans situatively, and into a small electrical company which carries out informal planning. In the former instance, the investigation showed that reliance is placed in

other learning venues and that there is confidence in the circumstance that all important processes converge in the administration of a medium-sized crafts company and that this means that apprentices are able to learn and pick up a sufficient amount of training. The predominant self-assessment is thus that good training is being offered in overall terms, even though the company providing training itself only acts situatively and therefore with comparatively little predictability (category 1).

In the second case involving informal planning (category 2), it is also possible to identify a clear conviction that good training is being delivered. The main reasons here are viewed as relating to continuous communication processes between everyone involved in training and to the expertise and extensive experience of these persons.

5.1.3.3 Training with written planning

Following the consideration of non-written training planning presented above, the next two sub-chapters will investigate written training planning, which is also designated as formal training planning. In our case, formally planned training programmes correspond to categories 3 and 4.

Deployment plans (category 3: time planning)

Six of the 13 companies with which qualitative interviews on office managers were conducted exclusively use deployment plans (category 3, see Chapter 5.1.1) which they draw up themselves. These predominantly include time planning of training rather than any technical or didactic contents. The companies in question comprise two IT companies, two industrial companies and two local government authorities.

The findings of the telephone survey show that a large majority of the 238 companies providing training in the occupation of office manager, 71 percent, use time planning (see Table 5). After adjustment of the figures to take account of double allocation to categories 3 and 4 (see page 15 f.), only 22 percent of the companies surveyed remain in the “time planning” category.

Both this quantitative value and the qualitative analysis of the 13 companies surveyed underline the key role played by deployment plans in the planning and structuring of training. Eleven of these 13 companies use deployment plans, representing a proportion of 85 percent. This value is even above the 71 percent indicated by the quantitative survey. These eleven companies also include the five which use a content training plan (category 4) since they deploy both types of planning. Six of the companies investigated use a deployment plan exclusively, i.e. time planning.

Understandably, as is shown by the evaluation of the eleven interviews, the common practice appears to be to draw up deployment plans prior to or upon commencement of a company-based training programme. This administrative and organisational task is taken on by training managers who either work alone before coordinating the plan internally or else collaborate with the staff providing training in the operating departments to develop the plans. The main objective of these deployment plans is to provide everyone involved with an overview of the sequence in which apprentices are to gain experience in each of the different departmental areas.

The training manager at a corporate group stated:

“The secretariats are always the main focus, three years of training, exactly. We plan for about the last six to eight months to be spent in these operating departments [Financial Accounting, Payroll], and the rest really does take place in the secretariat”. (0106, 116)

In overall terms, the interviews showed that deployment plans also reflect didactic and technical considerations alongside organisational aspects. The quotation presented states that the majority of the company-based training time is completed in the area of the secretariat. This is true of several companies within the same corporate group. A switch to operating departments is not planned until the end of the period of training. This approach may have its roots in the view that the core tasks of the training occupation of office manager need to be imparted in sufficient detail before further training in the operating departments seems useful. Areas of leeway are incorporated from the outset, as is made clear by the wording “about the last six to eight months”.

The following quotation from a local government authority also underscores the multifunctionality of deployment plans. They document organisational planning in order to be able to inform all those involved in a transparent manner whilst also integrating didactic requirements.

“When we draw up an overall plan for someone starting training, we prepare such a plan for the next three years and in effect ensure centrally that experience is acquired in the various areas during the course of training. The idea is that apprentices should spend time in other areas rather than always being [...] allocated to the secretariat. At the local authority itself, however, it is actually very hard for us to break down [the contents] centrally”. (0108, 74)

The aim of the deployment plan is to ensure sufficient changeovers during the period of company-based training with the inferred goal of offering varied and high quality training which enables apprentices to broaden their horizons, so to speak. The authority wishes to prevent a circumstance where an apprentice is “constantly deployed in the secretariat”. The objective instead is for them to be familiarised with different corporate areas and for new learning incentives to be created. This makes it possible to impart comprehensive knowledge of the complexity of the company as a whole and of its different business processes.

The training management department believes that overall organisation is their main contribution. It thus pursues a policy which stipulates a division of labour between the central training management department and decentralised training. The statement that “at the local authority itself, it is actually very hard for us to break down [the contents] centrally” makes it very clear where its planning competencies end and where the role of the training management department begins to become overextended.

Within the scope of the investigation, it became apparent that deployment plans do not usually represent static instruments. They are instead flexible guides which are subjected to frequent adaptations during the training process. Account needs to be taken of periods of absence of the staff delivering training and of the apprentices. More time may be needed if important learning objectives are not achieved as scheduled. By the same token, streamlining is required if apprentices are able to shorten their period of training by a year. A change of elective qualification may also necessitate adjustments. The departments included in the planning may also request support because they are experiencing high workloads. This, too, can be a factor.

The following change rhythm is normal in the aforementioned corporate group.

“[...] I need to revise this plan twice a year, but changes of one kind or another always happen frequently. So if there are transfers or if longer absences occur, then the plan needs to be adjusted and revised immediately”. (0106, 122)

This quotation expresses that a single change can exert impacts on the entire deployment plan, and this necessitates its regular revision. The reference here is to unpredictable incidents and changes (“changes of one kind or another always happen frequently”), which are the rule rather than the exception. The deployment plan thus constitutes an instrument of both input quality and process quality.

Content training plan (category 4, content planning)

In five of 13 cases, investigation of the qualitative interview indicated that a content training plan (= content planning, category 4, see Chapter 5.1.1) is developed and deployed in order to structure the training system. In two case studies – both government authorities – these and further findings emerge from the information provided in the interview. In both these instances, it is essentially possible to identify that the content training plans are aligned to the general training plan and that, according to the interviews, they include the company’s interpretation of the competencies to be imparted and information on training times and venues (0109; 0111).

Planning documents are available in addition to the interviews in three cases. These exhibit an interesting spectrum of degrees of planning and of stages of development. For this reason, a more detailed investigation on an individual case basis seemed appropriate. The three case studies in question involve a medium-sized service provider, a government authority with over 500 employees and a large chain of companies which operates nationally. These interviews and the material provided will be examined in greater detail with regard to the structuring of the training plans drawn up and the process via which they are developed.

We will begin below by describing the type and structure of the content training plans which are deployed for the training occupation of office manager. Descriptions will be presented separately for each company providing training which has a content training plan in place. This will be supplemented by an investigation into the respective development process and an explanation of the role played by the general training plan. There will also be a brief presentation of any additional materials deployed within the context of company training planning to support the training plans.

Special focus: Three case studies from practice: companies providing training which use content training planning

Company providing training 1: Medium-sized service provider (interview 0107)

This medium-sized service provider operates in the logistics sector. At the time of the interview, it has recruited two apprentices for the occupation of office manager. Two plans relevant to the issue we are addressing are in use. These are a “company training plan” and a further plan containing time and place-related stipulations for the training process.

The plan designated as the “company training plan” essentially portrays a tabular compilation of the contents of the general training plan across five columns. The first column lists the consecutive numbers of the occupational profile positions in an identical way to Annex 1 of the training regulations. Column 2 summarises the occupational profile positions and the associated “skills, knowledge and competencies to be imparted”. Column 3 sets out suggested time allocations (periods and duration within which the training contents should be imparted) on the basis of the information provided in Annex 2 of the training regulations.

The final two columns, which aside from their headings are not completed in the version made available to us, provide space for entries on the topics of “Period” and “Area and training manager”, whereby the latter term refers to the assigned instructors in the departments.

We can see that the information stated in Annex 1 (content structure) and Annex 2 (time structure) of the training regulations have been combined in this table. The wordings of Annex 1 have been adopted without any changes that are relevant to content. The same applies to the time values set out in Annex 2 of the training regulations regarding the further key skills, knowledge and competencies forming the occupational profile and the joint integrative skills, knowledge and competencies to be imparted. As far as the two compulsory qualifications are concerned (office and business processes), it is notable that these deviate from the time stipulations in the training regulations in all occupational profile positions compared to the other compulsory qualifications. A period of 15 weeks is, for example, stated for occupational profile position 1.2 “Information processing” (instead of between 4 and 6 months during the 1st and 15th months of training as set out in Annex 2). Ten weeks are allocated for occupational profile position 2.2 “Order processing and follow-up” (as opposed to 11 months during the 16th and 36th months of training stipulated in Annex 2 of the training regulation).

These changes may be designated as adaptations to company circumstances in pursuit of the goal of “[...] getting these contents into my company”, as the interviewee puts it. (0107, 150)

Although content and time-place information are conflated in the “company training plan” described, a deployment plan is also used in this particular case. The deployment plan relates to an individual apprentice and includes specifications not integrated into the training plan regarding areas of responsibility of the training staff, training times and training venues.

In terms of the development history, the remarks indicate that the company training plan was drawn up prior to commencement of training. The approach adopted initially involved scrutinising the general

training plan to see how a company training plan could be stipulated and to ascertain in which of the ten elective qualifications the company could provide good training.

“[...] We looked at ten elective qualifications – this is a new aspect of this training occupation – and we said: [...] which elective qualifications can we map effectively here at the company? Where are the resources? Where do we have trainers or training managers who enjoy teaching young people and supporting them in their vocational education and training? Because I think that this is a vital task [...]. It is important to have training mentors who really take pleasure in instructing others. We agreed on two – human resources management and commercial management and monitoring”. (0107, 34)

This means that stipulation of the elective qualifications has been made by the company prior to the beginning of training. A joint decision with an individual apprentice is thus excluded. According to the interviewee, who holds the position of head of training in the Human Resources Department, she subsequently drew up the plans and sent these to the different operating departments as coordination proposals.

“I take what I have developed, the general internal company training plan and the time planning, and speak to the training managers directly. I go through everything with them to see if it is feasible in their area. Also to see if it is feasible in terms of time. There are time slots where it might not fit”. (0107, 140)

She states that the “ordinance is the common thread”, and the aim is to reflect together with the training managers in the departments to ascertain whether plans based on the training regulations can be easily implemented at the company both in terms of time and organisation and technically with regard to content.

The content plan and the deployment plan are supplemented by the following further instruments.

1. A report booklet to be kept on a weekly basis which also forms the basis for joint monthly standardised appraisals involving the training manager in the Human Resources and the two apprentices in the occupation of office manager;
2. Assessment and development forms relating to certain discussion contexts such as the end of the probationary period or of the training year or a switch to a different department;
3. Supplementary information on the evaluation stages of the competency level achieved, which is based on the school marks scale and is used for self-assessment and external evaluation.

Company providing training 2: Government authority (interview 0101)

A government authority with over 800 employees represents a further example of a company providing training which has a content training plan in place. At the time of the interview, it had 33 apprentices in five training occupations, including office manager.

A document designated as a “training plan” extends over 30 pages and includes a tabular listing summarising the content and time structure of the general training plan. The table has several columns and includes the following positions.

- ▶ Consecutive number of the occupational profile positions
- ▶ Knowledge and skills to be imparted
- ▶ Explanations (of the knowledge and skills)
- ▶ Suggested time allocation
- ▶ Information on the respective learning venue

There are also two columns which state whether competencies are to be imparted at the company providing training or via separate in-service forms of instruction. The first two columns are completed with the contents of Annex 1 (content structure) of the training regulations without any appreciable deviation. The third column (explanations) contains detailed company specifications of the skills, knowledge and competencies listed in column 2. The tasks and work processes of the authority are thus presented in this way. In some cases, examples are used to describe what procedures and tasks apprentices need to be able to perform autonomously upon completion of the section of training. This is supplemented by detailed explanations of the respective level of detail of the occupational positions. Column 4 (suggested time allocations) contains information on the necessary duration of training for the imparting of relevant skills, knowledge and competencies and on the periods of time during which this should happen. The latter are taken from Annex 2 of the training regulations (content structure). The final two columns list information as to during which processes and in which organisational units the relevant competencies should be imparted at the authority.

This plan is viewed in the authority as being “superordinate”. It applies for the whole of the training period of three years and, according to the information provided in the interview, rarely needs to be updated. The available document was last updated in July 2014, whereas the interview was conducted in 2019.

“[...] Usually nothing will change as long as the training regulations are not changed. Obviously, the explanations could always be supplemented and updated. And, of course, new training venues can be added or entered if something has occurred in this regard”. (0101, 80)

A “personalised plan” also exists for each apprentice. This is presented on an A4 page covering the two halves of the training year and, according to the interview, is updated on an ongoing basis.

This document, which is designated as a “company training plan”, provides information on the respective training venue in systematised form for one year by calendar weeks and days of the week. As well as stating paid leave, vocational school and continuing education and training units and in-service instructions, the plan contains structured information on the training venues, which is mainly presented by organisational units and by the training staff responsible in each respective case. Unlike the title “company training plan” would suggest, it includes no information of any kind on training contents and actually really represents a personalised deployment plan. This deployment plan has its foundations in the “superordinate”, which by dint of its competency-describing contents might more appropriately be termed a “company training plan”. The linking of the two documents may be viewed in the written information relating to the learning venues and work processes located within the authority.

The following information was ascertained with regard to the generation of the plans described. The training head interviewed states that she has drawn up a training plan “from the training regulations”. In respect of the company interpretations of the contents of the training regulations listed in the third column, she explains: “[I] put in new explanations [...] because some of the things in the training regulations [are] written in such an abstract manner that it is simply impossible to understand them”. The aim of proceeding in this way, as is stated later in the interview, is to describe what is actually behind the learning objective. (0101, 60)

In the case study, the interviewee stressed the importance of the role of “training coordinators” for training success. “We have an urgent need for them” (0101, 35). Such coordinators were acting as points of contact between the head of training and staff delivering training in the respective departments. “Fine

planning discussions” were conducted with them whilst the annual deployment plans tailored to the individual apprentices were being drawn up.

“And this actually starts before the apprentices begin their first year of training with us, i.e. the head of training organises an appointment at which the training coordinator and perhaps possible trainers are present. [...] And then, in effect, we have a blank plan which only contains the times which I know from the vocational school [...], and then we set about filling it in. Then the people in the secretariat [...] say to me when the tasks occur and that it would be better for apprentices to spend time in one area before going to another where their previous knowledge can perhaps be built upon. We do this together and thus, when the apprentices arrive on 1 August, this plan has been completed”. (0101, 88)

This means that the individualised deployment plans are structured jointly according to didactic considerations within the scope of the meetings described. Care is taken to check whether knowledge previously acquired can be extended, the aim here being to secure an establishment of competency which has been rationally planned in accordance with pedagogical perspectives. Points which the apprentices bring with them, such as school qualifications and language knowledge, are also included during this planning process in order to accord due consideration to individual strengths and weaknesses. In contrast to the aforementioned superordinate “training plan”, the deployment plan is frequently revised. “[...] It is updated on an ongoing basis, every time something changes [...] it is constantly updated by the coordinators and then made available to the apprentices and us”. (0101, 82).

Both plans are supplemented by a digital report booklet and “status of learning documentation”. This is a tabular planning instrument in which the key skills, knowledge and competencies forming the occupational profile from the general training plan are addressed. Further columns provide an opportunity to enter aspects such as learning objective-related tasks and status (completed/not completed).

Company providing training 3: Large chain of companies which operates nationally (interview 110)

A large chain of companies operating nationally, which at the time of the interview had around 30 apprentices in the occupation of office manager, uses a highly differentiated planning instrument. Within the scope of dual training, each apprentice receives an individualised “training compass”²¹ which lists the company interpretation of the contents of the general training plan and also provides space for standardised completion requirements in respect of place, time, inclusion of persons and bodies delivering training and the use of tools.

The introductory pages of the training compass contain information on the course of training presented alongside illustrations to create a more relaxed style (1st year: arrival and exploration; 2nd year: main focus on elective qualifications; 3rd year: gather more in-depth experiences) and also include references to further literature and materials. This is supplemented by a planning and documentation aid for eight feedback discussions which need to be conducted in a standardised way during the course of training at this chain of companies. 24 of the 26 pages are devoted to a tabular content training plan featuring a total of nine columns. These have the following titles: 1. “Learning content” (a list of the occupational profile positions from the general training plan), 2. “Knowledge, skills, reflection”, 3. “No. according to general training plan”, 4. “What tools are necessary?”, 5. “Learning mentor and learning venue”, 6. “Time frame

21 The actual name of the training document will not be stated here in order to prevent identification of the company included in the investigation. A new designation will be used instead.

for acquisition (planned from ... to)", 7. "Current learning status in the topic (memo field)", 8. "Learning field achieved" and 9. "Finally discussed on ...".

Compared to the other two case studies involving a content training plan, the training compass stands out by dint of its professional-looking graphic and especially because of its complete abandonment of the order of occupational profile positions found in the general training plan. Even the order within the sections of Paragraph 4 of the general training plan is intentionally not retained. The positions set out in the training regulations have instead been put into a completely new sequence in which the relevant paragraph, section, and numbers from the general training plan are presented in a separate column.

Unlike the other two aforementioned case examples with content training plans, the training compass chooses not to mention the contents of the general training plan listed under "Skills, knowledge and competencies to be imparted". Instead, the third column of the plan – with the heading "Knowledge, skills, reflection" – immediately translates the competencies to be taught into the company context. This takes place via keyword descriptions and bullet points.

Further points of this instrument are also conspicuous. Firstly, it is a training plan in hybrid form. The training compass lists the company's interpretation of the training contents on the basis of the occupational profile positions of the general training plan and links these with time and place stipulations. It has also been conceived as a vehicle for the ongoing documentation of and reflection on feedback processes. Signatures of apprentices and of staff delivering training are thus able to record in the same document when learning contents have been completed and discussed.

The interview also indicates that the training compass takes over the function of the company training plan.

"Each apprentice has his or her own document to support them through training. We refer to this internally as the training compass [For reasons of anonymisation, the original word has been replaced.]. It has also been [...] submitted to the chambers of commerce and industry as a training plan in precisely the same form". (0110, 47)

The training support aspect and multifunctionality of the training compass are its key characteristics.

"[...] The apprentice and the trainer responsible apply this plan very strictly. They make entries such as: when am I planning the next topic, who is my learning mentor, in which time and during which time period will that take place? There is also a memo field to note aspects such as: gosh, time is up, maybe I haven't dealt with this topic, we need to readdress this, oh, this was particularly good, I'm particularly interested in that [...]. I can also [...] sign again when [a topic area] [...] has been properly processed by both sides". (0110, 47)

The memo field permits the recording of information which is essential to the future course of training, such as self-assessments or strengths and weaknesses. Such knowledge may be helpful for the subsequent departments in which the apprentice will gain experience. Another part of the interview states:

"[...] The apprentice does not spend the whole of the three years in one team. Switches take place [...]. It is then [...] always [good] for the person [...] supporting the apprentice in the next team to see: what has he or she done before [...]?" (0110, 48)

The general explanation for the multifunctional design of this version of a content training plan is as follows. "This is a type of planning, a form of documentation and also ultimately a type of navigation [...]". (0110, 48)

When asked how the training compass came about, the interviewee explained that the feasibility of teaching the elective qualification at the company was examined (0110, 62) and that the legal stipulations were followed to ensure that all conditions were met. In this regard, the company “mostly took things up another notch” in order to ensure compliance with the minimum standards. (0110, 47) It was not possible to clarify during the interview who was involved in developing the instrument. The works council, however, participates in its annual updating. (0110, 58)

The challenges of developing a training plan are addressed within the context of the updates to the training compass. Such challenges arise when seeking the right level of detailedness when translating the contents of the general training plan into the company context.

“[...] It is perhaps somewhat difficult to find a balance and to map the right level in a way which makes things more tangible for the trainer and to support them in the outcome of the interpretation [...] of the general training plan. But you also need to remain at a level which doesn't change every two weeks”. (0110, 69)

The differences of a plan which extends beyond the listing of competencies to be imparted from the training regulations and the internal alignment of time and place become apparent. The detailed conception of a plan containing a company interpretation of the contents of the general training plan, the updating of such a plan during training and the necessity of reaching agreement on the frequency and depth of the updating process involves even more work in terms of use of resources and coordination compared to the development of a deployment plan.

In the case of the training compass, the approach taken towards this circumstance is only to arrive at many stipulations during the training process itself and as the result of an interaction between the apprentice and the staff delivering training. The interviewee states that, at the outset, planning is specified as to what should happen in connection with the training during the initial days and weeks. This structure is, however, then “successively but constantly removed”. The objective here is for considerations relating to the next stages of training to be “increasingly intrinsic and increasingly self-directed by the apprentice” (0110, 25). These considerations then need to be agreed upon.

This is a procedure that may also lead to conflicts of interest.

“[We] tend to try to be as unprescriptive as possible. The wishes of the trainers may sometimes be a little different, and we always need to maintain a balance”. (0110, 70)

As in the other case studies, the training compass is conceptually integrated into a set of further instruments which serve the purpose of maintaining the quality of training. The training compass is supplemented by technical and weekly reports. The latter are the equivalent of the training record. They stipulate that apprentices should align teaching and learning contents to the occupational profile positions in the general training plan so as to foster their capacity for reflection.²² A duplication is apparent here since, as shown in the remarks above, the training compass has already been “submitted to the chambers of industry and commerce as a training plan in precisely the same form”.

²² The interviewee indicated that the report booklet is based on the “holistic training record” developed by the Lake Constance–Upper Swabia Chamber of Commerce and Industry as part of a pilot project (https://www.deqa-vet.de/de/daqavet_91366.php; status: 28/02/2025)

Inferences from the three case studies

The three case studies forming the object of investigation show that “content planning” is based on or linked with “time planning” (cf. the fundamental definition applied, see Chapter 5.1.1). In the instances examined, content planning in the form of a document in writing which does not necessarily need to be called a “company training plan” is always supplemented by a deployment plan. In two of the more detailed content planning cases studied, such planning is deemed to be superordinate and is complemented by the document relating to time-place coordination. This additional instrument is a deployment plan which is tailored in an individualised way to the training of a specific person.

A further pathway is pursued in the third example, where both time-place and content-substantive planning are merged into a single tool. In other words, the deployment plan is integrated rather than being separate. This instrument has been conceived as multifunctional. The aim is that it should act as a kind of individual support mechanism for apprentices over the course of training whilst also managing and documenting feedback. The intention is for the skills, knowledge, and competencies to be imparted from the training regulations to be largely translated into the company context on a step-by-step basis during training itself in the form of learning-related tasks (“Current learning statuses in the topic/Learning contexts”). This interpretation is the result of an interactive process between the apprentices and the staff providing training. The aim is to support the apprentices in the further development of their capacity for self-reflection.

In the case of the medium-sized service provider (example 1), the company restricts itself to a time-place “translation” which is related to the competencies to be acquired in accordance with the general training plan. This training plan version does not specify the tasks, activities or measures via which this imparting of competencies should take place.

In the case of the government authority (example 2), on the other hand, translation of the contents of the general training plan into the company context and time-place stipulations enable the competencies that are to be imparted to be broken down into specific work tasks and processes occurring at the company providing training (“learning objective-related tasks”).

These processes of interpretation are supported and facilitated by processes of internal coordination. Their purpose is to ensure the feasibility of planning. The head of training may submit proposals and seek feedback on these from the training managers in the departments. The evaluations of the parties involved are correlated during these discussions in order to create a foundation for the implementation of any amendments and adjustments to planning that may be necessary.

Notably, the planning reality of the company providing training is that it removes the separation between content and time stipulations and suggested allocations set out in the two annexes to the training regulations. Both content and time stipulations are summarised in a single document (see case studies 1 and 2, pp. 26 and 27). One consideration here would be whether this work, which requires great diligence and is prone to error, could be performed by means of a merged presentation in the training regulations in order to reduce the burden placed on companies in this respect. One alternative would be to conduct this via appropriate support tools.

In addition to this, the instruments always have their foundations in the contents of the general training plan (including Annexes 1 and 2) even though the presentation in the training regulations is not adhered to in all examples in terms of content aspects such as completeness, sequence and word-for-word adoption. Planning instruments which are more multifunctional are also more complex in structure. Greater

multifunctionality and complexity means that the derivation from the training regulations or from the general training plan will appear to be more independent in the sample investigated.

In addition, in all three cases examined separately, the content- and time-based training plans used by the companies are supplemented by additional planning tools that build on or interlock with each other and are generally used for further documentation (report booklet) and process-accompanying evaluation of the training status.

In summary, we can state that the task of translating the contents stipulated in the training regulations into practice represents a demanding and complex obligation for the companies providing training. Depending on the size of the company, a differing number of stakeholders will be involved. This applies to time planning and to an even greater extent to content planning.

Finding the right degree of detailedness constitutes another challenge alongside coordination and implementation of decision-making processes in connection with the development of training plans. In order to avoid updating too frequently, the wish of the companies is for plans to be drawn up so as to be sufficiently meaningful but not to be structured in too much detail. As mentioned above, the solution envisaged in one case is for the task of continuously updating the personalised planning components during the training process itself to be successively passed on to the apprentices themselves. The idea is that they should cooperate with the staff providing training to manage their own plans and keep them up-to-date. This illustrates the high demands placed on apprentices with regard to coordination and communication skills.

It should be noted that all three case studies concern large companies. This provides empirical support for the finding that large companies are more likely to undertake content planning, something which is also borne out by the qualitative interviews. All three companies use both “time planning” (training planning in accordance with category 3, see Chapter 5.1.1) and “content planning” (category 4). Content training planning thus has its basis in time planning.

The qualitative analysis of the three case studies permitted the identification of different levels of elaboration with regard to content training planning.

Level of elaboration 1: the skills, knowledge and competencies to be imparted pursuant to the general training plan are aligned to further information presented tabularly in one of more documents, e.g. regarding learning venues, times and the training staff responsible in each instance. There is no detailed written breakdown of the way in which competencies are to be imparted, and neither are any didactic and technical considerations elucidated in writing.

Level of elaboration 2: the “how” of the imparting of competencies is presented in addition to the steps stated under the first level of elaboration. The time stipulations and the technical contents stated in the general training plan are translated in writing into the company context. This takes place with regard to skills, knowledge, and competencies in forms such as listings of specific company work tasks and processes which are viewed as being suitable for the purpose or via the stating of tasks/work processes which the apprentice ultimately needs to master.

Level of elaboration 3: the outcomes of the company’s interpretation of the contents of the general training plan presented in level 2 are recorded in a multifunctional tool. The additional integration of information materials and feedback instruments into the training plan both facilitates and specifically fosters continuous editing during the training process. The company interpretation of the contents of the general training plan is consciously turned into part of the training system by gradually and intentionally encour-

aging apprentices to assume responsibility for parts of planning via networking with the staff providing training.

Irrespective of which level of elaboration is involved, the training plans are deployed in conjunction with further documents and instruments in all three instances although parts of these documents and instruments, as is the case in respect of level of elaboration 3, the highest level, are already integrated into the main planning tool to some extent.

These various degrees of content training planning also allow documentation of the depth of quality assurance associated with use of the respective planning instruments. If the four phases of the EQAVET Reference Framework – “Plan-Do-Check-Act” are considered,²³ it is possible, with regard to the multifunctional training planning instrument used in case study 3, for example, to conclude that, compared to the other planning documents, all four quality assurance phases are addressed (cf. Table 7).

²³ The European Quality Assurance Reference Framework for Vocational Education and Training (EQAVET) has been in existence since 2009. It has its origins in a Recommendation of the European Parliament and of the Council issued in the same year, which was superseded by the publication in 2020 of the Recommendation on Vocational Education and Training for sustainable competitiveness, social fairness and resilience (cf. RAT DER EUROPÄISCHEN UNION 2020). The EQAVET Reference Framework is based on a quality assurance and improvement cycle (planning, implementation, evaluation, review) and on a selection of descriptors and indicators which are used for quality management both at the level of the vocational education and training system and at the level of VET providers. See also: https://www.deqa-vet.de/de/daqavet_88373.php; status: 28/02/2025.

Table 7: Alignment of quality assurance instruments for the planning and structuring of training to the four quality phases of the EQAVET Framework

Quality phase ²⁴	Examples of quality assurance instruments within the scope of the planning and structuring of training	Examples of task steps in conjunction with the planning, implementation, evaluation and possible review of the imparting of competencies
Planning	▶ Content training plan which describes the competencies to be imparted pursuant to the general training plan and which may contain further information regarding areas of responsibility, learning venues and teaching methods and teaching situations ▶ Deployment plan ("time planning")	Company interpretation of the contents of the general training plan to be imparted with regard to learning venues, time phases, learning and teaching methods, and learning and teaching situations
Implementation	▶ Content training plan with documentation fields in which e.g. feedback discussions can be recorded to support the process ▶ Report booklet which helps to document the steps of training to support the process (see Chapter 5.2)	Documentation ▶ of the imparting of competencies and/or of learning progress ▶ of feedback meetings
Evaluation	▶ Content training plan with feedback fields for mapping the planned imparting of competencies against actual imparting of competencies ▶ Report booklet with extensions for comparison (column for alignment with the contents of the general training plan) ▶ Evaluation form with application guides if necessary	Mapping the planned imparting of competencies against actual imparting of competencies in respect of ▶ completion (have all the positions forming the minimum requirement pursuant to the general training plan been covered?) ▶ quality (does the apprentice have sufficient mastery of the contents to be imparted?)
Review	▶ Content training plan with fields which permit the provision of information regarding agreements between the training participants containing any adjustments to the course of training which are deemed necessary ▶ Documentation guides for feedback/appraisal meetings which record the results of a training review	Development of adjustments regarding aspects such as the planning, implementation and monitoring of training

Source: own representation

²⁴ Corresponds to the quality cycle model (Plan–Do–Check–Act; see COUNCIL OF THE EUROPEAN UNION 2020, Annex II).

5.1.3.4 Summary: Written training planning

According to the information provided in the cases investigated, the specific shaping of company training plans essentially has its foundations in the objective and obligation of the companies to take account of statutory requirements. A social desirability effect must certainly be factored in with regard to the statements made in the interviews since the project interviewers were BIBB staff members and were present during the interview situation in their capacity as representatives at the system level. Deployment plans are a low threshold form of written training planning (category 3) because, alongside administrative information relating to participants and places, they primarily contain time planning for training.

The findings of the telephone survey (71 percent) and of the qualitative interviews (85 percent) show that time planning is used by a large majority of the 238 or 13 companies proving training in the occupation of office manager.

The main objective of these deployment plans is to provide everyone involved with an overview of the sequence and the different departmental areas in which apprentices are to gain experience. However, the interviews also show that deployment plans also reflect didactic and technical considerations alongside organisational aspects. Within the scope of the investigation, it became apparent that deployment plans do not usually represent static instruments. They are instead flexible guides which are subjected to frequent adaptations during the training process. The deployment plan thus constitutes an instrument of both input quality and process quality which is developed in the operating departments and frequently features collaboration between the training management department and the training managers.

All companies pursuing content training planning in accordance with category 4 (see Chapter 5.1.1) also use deployment plans which are used in a supplementary manner or integrated into existing planning instruments.

The challenge of “translating” general training plan contents into the respective company context is tackled in various ways from a written planning point of view. In this respect, it was possible to identify three levels of elaboration in the case of the three examples investigated.

Tools extending beyond the company training and deployment plans are used in the cases investigated in order to be able to structure the “process phase” of training in an effective manner. These include feedback, documentation and evaluation instruments. These were developed further into a multifunctional instrument in one in five companies (case study 3) with a content training plan. There are fluent transitions from training plans which are exclusively of an input character to planning aids which can be actively used and shaped during the course of training and in conjunction with a review.

It may be stated that written training plans only convey part of the training planning recorded in writing, regardless of whether such plans are conceived in terms of time (category 3) or in terms of content (category 4). They tend instead to very much form part of a larger set of planning, monitoring and documentation aids. Even though the written training plans primarily constitute input documents, they also become process related quality instruments via the procedures described above.

This corresponds to the “Plan-Do-Check-Act cycle”, which prescribes that four phases need to be completed in quality assurance. As Table 7 demonstrates (see “Inferences from the three case studies”), the totality of the planning instruments identified can be aligned to the task sections of planning, implementation, evaluation and possible review. In the case of the chain of companies operating nationally (case study 3), the company training plan has been further developed to the extent that it can be deployed across all four phases.

The interview material permits the investigation of many other aspects which are of significance in connection with company training planning. The empirical data basis for the further investigation of the distribution of company roles with regard to training planning (see Discursion 1) and the reasons for the type of structuring and use of content training plans (see Discursion 2) seemed to be particularly promising to the project heads. Both of these issues will be addressed separately below.

Discursion 1: Autonomy and areas of responsibility in training planning

Various stakeholders are involved in training planning at the companies and take on different respective roles. For example, the medium-sized and larger companies forming an object of investigation are particularly likely to have heads of training, who mostly assume an overarching responsibility for the management of training whilst operating from the human resources department. The operating departments have “training managers”, who are in charge of the operational implementation of training planning and work in conjunction with skilled workers providing training in the workplace and executing training in practice without necessarily being in possession of a qualification pursuant to the Ordinance on Trainer Aptitude. Most of the training performance is incumbent on the latter. Measured in hours per apprentice, persons who take on training duties in parallel with their normal tasks spend around 70 percent of their working time on the former (cf. SCHÖNFELD/WENZELMANN/PFEIFER 2024, p. 14 f.). Against this background, an examination was also conducted into where the respective areas of responsibility with regard to training planning begin and end.

The following approach adopted by the sales department of an industrial company was described to us.

“[...] no later than one month before the start of a deployment in this area, the training managers receive an email from me [...], which I have brought to show you. This contains the information that the apprentice is coming and for what period of time. The general training plan is appended so that the training managers can have another look and pick out the relevant points which are important for their department”. (0112, 131)

At this company, the training managers are sent the material – including the training plan – which they need to consider via an e-mail which is standardised at least in part. As is the case at other companies, we can observe that the training management departments only support or lead the training system up to the border of a company division. Although the email communicates very rough time planning (“[...] the apprentice is coming and for what period of time [...]”), it is the responsibility of the training managers in the operating departments to decide how the binding training contents in the attached general training plan are to be translated into company training practice (“[...] so that the training managers can have another look and pick out the relevant points”).

Most of the interviews reveal that training staff in the departments enjoy a high degree of autonomy. This means that there are fewer stipulations but also that less support is given by the training management department – if such a department is in place.

A large IT company explained:

“Indeed we leave it to the trainers to a certain extent to determine how they will go about things. Most actually pick up the general training plan, rewrite it to suit their own purpose and tailor it to Company A [name changed]. I support this and think it is the proper approach. I then always say OK and remind them to check that the fundamental things are covered. But it is fine for them to structure it for themselves. Of course, it varies from trainer to trainer. If we have a trainer who has been doing this for 15 years and now has his 16th apprentice sitting there, then I’m confident he can do it standing on his head”. (0104, 102)

In this instance, converting the provisions of the general training plan into the world of the company and into learning opportunities is a task for the training staff. The training management department is informed that this process is conducted in writing on the basis of the general training plan. However, no monitoring takes place of these sub-plans set out in written form. Checking “that the fundamental things are covered” is the responsibility of the authors of the plans themselves.

The description here concerns the fulfilment of a task based on a division of labour which has its foundations in the trust of the training management department vis-à-vis the staff providing training. The phrase “I think it is the proper approach” demonstrates this.

One interesting aspect is the mention in the closing part of the quotation of an experienced trainer in whom greater trust is placed (“I’m confident he can do it standing on his head”). By the same token, the supposition must be that the same training management department will provide closer support to trainers with less experience if required.

The head of training at a medium-sized IT company, at which deployment plans constitute the sole written form of planning, makes the following remarks regarding the approach taken:

“We actually prepare [a deployment plan] for the complete period of three years, but there is no plan for the nature of the tasks which will be performed in the various areas. To be honest, we leave this up to each individual department a little bit”. (0105, 77)

An explicit enquiry as to whether the departments acted autonomously was answered in the affirmative. In this case, therefore, the training management department assumes the task of selecting the training areas which are necessary to cover the requirements of the training regulations and also organises the sequence in which experience in these will be gained. Once again, we see that the actions of the training management department end at the threshold to the internal operations of an operating department. The question as to which degree of responsibility and thus which rights of intervention have been accorded to the training management department by executive management or as to what support it affords in the event of conflict must remain unanswered at this point.

In the corporate group represented in the sample, the level of autonomy accorded to individual companies in the field of training is so extensive that the central training management department is unable to say whether written planning documentation outside the central deployment plan is used at an individual company level. It believes, however, that this is very unlikely:

“I can’t imagine that this happens, to be honest”. (0106, 160)



Discursion 2: Reasons for the specific structuring and use of content training planning

The findings gained on the existence and type of training planning give rise to questions regarding motivation and reasons. Why are or were plans drawn up in this way rather than in another?

This issue was pursued on the basis of all qualitative interviews conducted during the course of the project using specific interview questions and evaluation of indirect items. Aside from findings relating to procedural and sub-aspects of the genesis of training plans, which mostly emerged as an intrinsic part of the interview, two of the guided questions were aimed specifically at exploring company training culture. This approach follows the thesis that the motivation for training planning is based on the intention to use certain planning to achieve certain goals. By the same token, this means that, if the objectives of training are known, useful findings relating to the reasons for specific planning behaviour may emerge.

Below, we will initially present an evaluation of interview responses from the five companies with a content training plan with which qualitative interviews were conducted in respect of the following two questions.

- ▶ “From your point of view, what is good training?”
- ▶ “What do your apprentices need to be able to do at the end of training?”

Aims of training

In response to the question as to what constituted good training from the perspective of the interviewee, the answers in four out of five cases related directly to the statutorily prescribed standards.

The head of training at a medium-sized service provider, for example, stated that good training was characterised by good internal company implementation of the training plan based on the training regulations (0107, 22; similar: 0111, 26).

The response of the head of training at the government authority pursues the same path.

“Good training is when the trainer always sticks to the training regulations and takes great care to ensure that the contents described there are covered and covered in such a way so that monitoring can take place before the examination(s) arrive [...]” (0101, 17)

A further interview makes reference to the final examination rather than to the training regulations. In this case, the statement is that good training is associated with very good preparation for the examinations. (0109, 42)

The totality of the remarks enables us to conclude that training planning should be based on the statutory stipulations so that implementation in accordance with requirements can be ensured.

This view has its foundations in the self-evident notion that the curricular contents already developed at a system level represent the basis and starting point for company training services which are deemed to be set and necessary. There are no indications that addressing the quality of training regulations is considered to be a task for companies providing training. Nevertheless, a motivation is expressed to go beyond the requirements stipulated in the training regulations. In this way, account can be taken of their status as a minimum standard.

According to one interviewee from the chain of companies, the focus is on “taking things up one more notch” (0110: 47) or, as the government authority states: “We do not merely wish [...] to provide regular training in accordance with the training regulations [...] and we are happy to offer more [...]”. (0101, 17)

All five interviews show to a greater or lesser degree that company attention is focussed on the implementation process. The largest amount of energy is accordingly directed towards remaining in contact with the apprentices to observe on a continuous basis whether the implementation of training meets the planning stipulations. Mention is made of the fact that “the whole of the period of training is ultimately examination preparation” and that one key element of this is to look at the results of intermediate examinations and to “network regularly and simply also consciously use the feedback discussions and the whole of the time [...] for examination preparation”. (0110, 75; similar 0109, 52)

This endeavour to achieve continued monitoring of the training system is made clear by the deployment of various instruments for the areas of reporting and feedback procedures.

In contrast to responses which were closely based on statutory standards, four out of the five interviews relating to the question regarding “good training” went on to expand on the topic. The wish was expressed to “prepare young people for working life” (0101, 39). After training, the aim was for apprentices “[...] really to be capable of qualitatively good deployment in the job in which they were permanently employed”. “It is important for them to have a mastery of technical contents and for them to [...] be able to involve themselves in the team in which they are working in an outstanding way” (0101, 21; similar 0111, 40). As was expressed in the interview with the representative of a chain of companies: “Good training is when, at the end of the period of training, apprentices are capable of performing the tasks that will arise in their occupation [...] not merely professionally but also in terms of the changes they will experience in their working lives” (0110, 22). It was a fundamental objective for training to allow apprentices “to move professionally within their working environment and to be able to associate themselves with an occupation” (ibid.). Another interview expressed the wish “really to train the apprentices in the best possible fashion so that they would be genuinely in demand on the labour market [...]” (0101, 17).

These quotations fundamentally imply occupational proficiency, the overarching objective of training pursuant to the Vocational Training Act. This objective encompasses the imparting of both occupation-related professional competencies and of superordinate personal competencies (social competence and autonomy). The ultimate aim is that this should lead to improved employability. Accordingly, there is therefore also a focus on “acquiring an occupation” and on gaining the self-assurance to perform autonomous occupational actions.

During the further course of the interviews, the question was also posed as to what apprentices need to be able to do in order to achieve the goals set out. The objective that the apprentices should achieve autonomy, the ability to assume responsibility, process understanding and a capacity for reflection is a main thread running through the interviews. One interviewee stated that the aim was to involve the apprentices in whole processes so that they understand “the entire context” and learn that “the team or the colleagues are also dependent on the work outcome [of the apprentice]”. (0101, 25)

In connection with an explanation of learning status documentation used at the company during the training process, the same interview also states that apprentices must learn to reflect on their own actions (0101, 100).

The chain of companies operating at a national level emphasises that young people should learn to discover their own possible solutions and should engage with others to obtain ideas. Ultimately, the compa-

ny needed employees “[...] who think about their own approaches, are willing to question things and who are prepared to think differently [...]”. (0110, 155)

The interviewee from the service provider points out that no work tasks are simulated. Instead, apprentices “follow the complete process” in areas such as human resources and job application procedures and, initially under guidance but thereafter very quickly, are able to assume autonomous responsibility for tasks. (0107, 58) Autonomy is thus identified as an important training goal with methodological and didactic challenges in store, as the following quotation expresses.

“[...] Do I let that go on [or] do [I] seek to enter into discussion after the initial experiences [...]? Simply to prevent the frustrations from becoming too great. Also, it might not be good for business if they keep on doing something for two or three weeks or take a decision which might not be viable for the company [...]. This means that things are highly complex for the trainer, too”. (0110, 37)

This makes it clear that the staff delivering training face the task of according the young adults the right degree of freedom that will allow them to strengthen their autonomy by gathering their own experiences whilst also taking due account of pedagogical and economic considerations. The development of independence is encouraged by speaking to apprentices “as equals” although the avoidance of “overload” self-evidently forms part of pedagogical responsibility.

“[...] basically they [the apprentices] are considered in the same way as colleagues [...]. We don’t actually make any distinction unless we have to, but then we start by saying: you are fully fledged members of staff, just like us. In the way we think about you, of course not in terms of the demands placed on you”. (0107, 100)

With regard to this case study, it should be stressed that the interviewee attaches great importance to a pleasant atmosphere within the training system (“having fun”). Both this and other interviews express the notion that this approach creates optimal conditions for fruitful development (similar 0109, 212 and 0111, 28). The attitude outlined above becomes clear at various points. One example is as follows.

“This is the most important thing for me. Appreciation and recognition are important, and so are fun and enjoyment. When they reflect in 20 or 30 years, we want them to say how great it was that they did their training. This is my goal, and it’s something which I can say myself. I’m still in touch with my trainer, and I completed my own training back in [19]84!” (0107, 316)

The responsibility of the company providing training to help and support the young people through an important phase of life is emphasised during the course of this interview.

“[...] this is precisely the period where their private lives develop in such a great fashion. I find it fantastic to observe this over these three years”. (0107, 208)

One of the goals of training is thus to use regulated networking and feedback discussions to help apprentices to find out which professional direction they wish to embark upon in the field they have already chosen. Within this context, there is a decided delineation between training and the induction of a new employee.

“It is different when someone who has already completed training arrives at a company as a new employee. The difference is that they receive instructions, then they are allocated to a particular task which they proceed to carry out. That’s it. I want to provide apprentices with an opportunity to look into a wide range of tasks and topics so that they can find out for themselves where their own interests and main focuses lie”. (0107, 88)

These remarks ultimately indicate a caring attitude towards the apprentices which is reflected in the pedagogical and didactic approach adopted. It is based on an awareness of the particular opportunities and

challenges that arise for young people within this phase of life, both on the part of the young people themselves and for the staff providing training.

The aim is for the stated training objectives to be achieved via an organised approach which is supported by written training plans. Plans should ensure transparency and a good overview for trainers and also in particular for the apprentices themselves.

“[...] because it is important to us for apprentices to know what training is all about and to understand what it is based upon in the first place [...]”. (0101, 60)

As far as learning venues are concerned, the case studies place an emphasis on a regular switch between training places inside and outside the company (e.g. various operating departments, an external phase of training at a company with which cooperative arrangements have been made or a period of training spent abroad). At the service provider (case study 1), for instance, switches take place about every six months. “We have done it like this on purpose, [...] we want to bring a little momentum to training and this is why we have the changeovers”. (0107, 40)

A further idea is that repeated rotation into the same specialist area will help to intensify experiences at various levels and that this will lead to “content enhancement” or job enrichment characterised by fewer routine tasks and by more higher level activities (0107, 88).

One training manager at the chain of companies (case study 3) points to the necessity of apprentices remaining within a work context for a particular duration in order to facilitate the imparting of personal competencies such as the ability to act as part of a team.

“We take great care to ensure that the training times spent in individual teams are really long so that real teamwork can take place”. (0110, 33)

In this instance, the focus tends to be on avoiding changeovers that are too frequent so that apprentices are able to stay for a length of time which is sufficiently long. This affords them opportunities to understand work processes as comprehensively as possible and subsequently to progress to a point where they are able to help shape these processes. This necessitates a well-founded knowledge of work correlations on the part of the stakeholders involved in training planning.

“We don’t take such a strict approach, especially with regard to the occupation of office manager. We don’t just send them from department to department so that periods spent in Financial Accounting and Controlling are merely recorded on paper. Instead, we look at the nature of the context and of the work”. (0110, 35)

It may be noted here that the structuring of the training plan complete with the changeovers stipulated follows a carefully considered didactic understanding and a specific notion of the nature of training rather than simply covering the contents listed in the general training plan. This implies a picture of apprentices who are going through an important phase of life and who should be supported in gaining an understanding of the various work processes to create a basis that will allow them to act autonomously and in conjunction with other employees to pursue occupational orientation and to develop holistically. This challenge is mainly reflected in the parts of the plans which are used for the purposes of monitoring and feedback processes. Mention should be made in this regard of the multifunctional planning instrument of the chain of companies (case study 3), which places the focus on formation of independent planning skills of the apprentices. In the other cases, implementation of the stages that aim to facilitate the achievement of these training goals, which extend beyond professional knowledge, are primarily supported by the supplementary feedback and reporting instruments rather than via the content training plans.



5.1.4 Conclusion: Company training planning

As this study so far shows, companies approach the task of planning training in different ways.

The overall survey permits the conclusion that written (formal) training planning is carried out in 59 percent of instances and is therefore more common than non-written training planning. The results of the main investigation further indicate that small companies are less likely to use written training plans. To this extent, it comes as no surprise that companies in the crafts sector are most likely to conduct their planning in non-written form. However, the area of training of the crafts sector contains a disproportionately high number of small companies.

A further differentiation of the area of non-written planning for the crafts sector shows that informal planning is most prevalent (50 percent, category 2, see Chapter 5.1.1). A small proportion of five percent carries out situative planning (category 1), meaning that the figure for category 1 is negligible.

The quantitative telephone survey for all occupations investigated revealed that only three percent of the 1,343 companies providing training conducts situative planning (category 1). On the basis of the definition of types of planning deployed here, we may assume that very few conceptual and didactic considerations are applied in these cases and that training emerges in a flexible manner from the daily company processes. With regard to fulfilment of the objective of good training, trust appears to be placed in the other learning venues.

Only 38 percent of all companies investigated plan informally (category 2). Although no written planning is in place in these cases either, the companies providing training make a conscious effort to ensure that account is taken of all knowledge, skills and competencies to be imparted during training.²⁵ The overall survey thus also indicates that situative training planning constitutes a fringe phenomenon.

One fundamental aspect of non-written training planning is the circumstance that nothing is set out in writing, which makes it difficult to obtain understandable and detailed findings relating to this type of planning. Indications in this regard are provided by the evaluations of the qualitative interviews for the two relevant companies which provide training in the occupation of office manager. In the case of companies using situative planning, they show evidence of self-assessment on the part of training managers which has its foundations in the fact that the general prevailing conditions at small companies which may not be specialised secure the imparting of good training in a certain manner. The manageable size of the company means that apprentices are “close to everything”. They are “fully aware of what’s going on” and thus receive good training even without formal written planning. This, in turn, supports the plausibility of the aforementioned finding that small companies providing training are more likely to pursue non-written planning. In addition to this, training managers were shown to possess an explicit confidence in further learning venues (vocational school and the inter-company vocational training centre), which reliably assume responsibility for the systematic and structured imparting of training contents.

A separate consideration of the companies providing training in the occupation of office manager reveals that the figure for informal planning is considerably lower (15 percent, see Figure 2, p. 24 and Figure 3, p. 60). Situative planning is also somewhat rarer in the occupation of office manager (2 percent in Figure 2 as opposed to 3 percent in SCHREIBER et al. 2023: 30).

In the case of the companies forming an object of investigation which provide training in the occupation of office manager, we may therefore summarise that non-written planning is

²⁵ The relevant response category in the quantitative telephone survey for the question: “How do you organise the course of training at your company?” is: “We ensure that apprentices are able to familiarise themselves with all tasks that form part of their training occupation but we do not have a written plan in place”.

less likely than in all occupations examined in the overall survey. The reasons for this can only be a matter of speculation. It may be the case that the written development of planning documentation and of further materials is characteristic of the occupational profile of office managers and that moving towards the written development of a training plan could be less common than in other occupations with different profiles.

It was possible to identify differentiated insights and findings because of the comparatively high level of textuality in the training. A broad degree of heterogeneity was particularly discernible with regard to content training planning (category 4), and this was looked at in more detail in three case studies.

As concluded above, the likelihood that training will be planned formally, or in writing, rises notably in line with the size of the company providing training. The most common approach was to use a deployment plan (category 3), and this was the type of planning most frequently found in this survey. Deployment plans are also deployed additionally at companies which use a content training plan. The companies providing training in the occupation of office manager which were investigated via qualitative interviews thus always have time training planning in place alongside content training planning.

With regard to aspects such as the nature of the written translation of prescribed general training plan contents into the company context, the development and structuring of content training plans exhibit a variance which can be identified as different levels of elaboration. The differentiation and complexity of content training and its deployment exhibit a wide spectrum. This ranges from tabular documents prepared in a simple fashion to multifunctional tools which integrate information guides, further materials, documentation, feedback and evaluation instruments. In one case, these are developed further by the apprentices in a process-accompanying manner in conjunction with the training staff.

A training planning tool elaborated in this way has the potential to cover all four phases (Plan-Do- Check-Act) of the EQAVET Reference Framework and thus provides the foundation for comprehensive quality assurance.

Companies use their content training plans in combination with other instruments even if the latter, as just depicted, are not integrated into a tool (see case study 3). The individual content training plans are thus deployed in conjunction with other instruments which may already exist, such as the training record. This parallel or successive use also facilitates achievement of comprehensive quality assurance pursuant to the EQAVET Reference Framework (see Table 7).

In summary, we are further able to state that the structuring of written training plans, including in the case of deployment plans, contain pedagogical and didactic considerations and express the companies' own guiding principles regarding the question of what constitutes good training rather than merely representing an administrative and technical process.

It frequently seems to be the case that training plans are developed via a procedure based on the division of labour, especially at companies with training management departments. The investigations revealed a high degree of autonomy on the part of the operating departments and staff delivering training in respect of the specific company implementation of training contents. This is particularly the case when the company has recourse to experienced colleagues to act as training staff.

In instances where a training management department is in place, it appears to be incumbent on such a body to design a training plan which at least includes rough time and deployment planning. This is followed by feedback processes with the departments to determine whether these plans are fundamentally feasible. Detailed planning as to the specific nature of the company's interpretation of the training contents is then left to the training managers in

the operating departments and is not monitored further. This may also imply the question as to whether plans with further differentiation are developed in the departments at all.

The empirical material indicates that the actions of training management departments end at the threshold to the operating departments. On the one hand, this constitutes a high degree of trust in the competency of the staff providing training. On the other hand, the extent to which this is perceived as a lack of support at the implementation level, such as in cases of conflict, remains unclear. In some cases, training staff are thus left to rely on their own experiences and skills.

The interviewee from the training management department of a chain of companies operating at a national level, which has the most elaborate content training planning in place (case study three), summarises this point in the following terms:

“To be blunt, I believe that a general training plan of this kind completely overburdens trainers who work part-time and are left to their own devices. Because, especially when I look at the occupation of office manager and its elective qualifications, it is a very complex matter to figure out and to understand: what it’s all about, what needs to be done, how things need to be done and in what period. And then there is the annex containing the structuring. I think that this is really difficult. We enjoy the luxury of being able to perform this translation and to break things down further and explain them to our colleagues. I believe that this is really hard for a small company where the trainer is also carrying out normal work duties. The local chamber of commerce and industry is also available for the translation, although we have had experiences which have been good and less good”. (0110, 121)

The investigation fundamentally revealed an explicit perception on the part of those involved in the challenge of drawing up and implementing training plans. One example where this becomes clear is in relation to the question of how planning documentation is managed with regard to the time and resources required and how often it should be updated during the training process. The decision of staff providing training on the extent to which and the frequency with which there should be planned changes of learning venues and of other largely fixed stages, such as attendance at vocational school, thus also depends on the company’s own ideals with regard to successful courses of training. The complexity of developing training plans was highlighted via the example of training managers seeking to identify the suitable duration of phases of training. In one case, the idea was for apprentices to work in teams for long enough to be able really to penetrate processes. In another instance, the wish was for there to be enough changeovers in order to provide sufficiently different contents and influences. Depending on the main pedagogical focus, trial and error and the gathering of experiences are used to seek a solution in this context. This solution is then manifested in the relevant plans. It becomes clear that this is a challenging task which also needs to be performed within the area of conflict between operational and business interests and pedagogical and educational requirements in which staff providing training work every day.

We are further able to arrive at the overall conclusion that the choice, design and use of plans always reflect company values and guiding principles in respect of what is perceived as being good training.

The evaluation of the qualitative interviews conducted with companies which provide training in the occupation of office manager provide evidence of the endeavour to offer training which extends beyond the minimum standards. We find manifold proof of the motivation to impart personal competencies such as autonomy, a capacity for reflection and process understanding and to exert a supportive effect on the professional orientation phase of the young people. This is in accordance with the overarching objective to impart “occupational proficien-

cy” as set out in § 1 Paragraph 3 of the Vocational Training Act (BBiG)²⁶ and tends to go still further in the area of personal development.

The findings thus provide evidence of awareness on the part of training managers for the life situation of the apprentices and for the associated responsibility borne by trainers. A major role is played within this context by the efforts made during the process by both trainers and apprentices to obtain ongoing knowledge of the status of training and the ability to judge this status. In some cases, this is addressed via written training plans which serve as a basis for formalised reflection and networking processes. However, a particular vehicle is also provided by supplementary feedback and reporting instruments.

5.2 The training record

Quality assurance of the dual training system is primarily based on input and output criteria. It is rarer for binding quality assurance elements or instruments to relate to the implementation process of company-based training (cf. FEDERAL INSTITUTE FOR VOCATIONAL EDUCATION AND TRAINING 2017, p. 8). In Chapter 5.1, we ascertained that some types of company training plans are stipulated prior to the commencement of training, whilst others become dynamic instruments which are edited further throughout the whole of the training process.

The training record (also referred to as report booklet) is kept during training and can therefore particularly exert a quality assurance effect during the training process as well as at and after the end of training. It provides a suitable basis for readjustments during training.

5.2.1 Legal stipulations and recommendations

Pursuant to § 43 Paragraph 1 No 2 BBiG or § 36 Paragraph 1 No. 2 HwO, submission to the competent body of a report booklet kept by the apprentice and countersigned by the training staff is a prerequisite for admission to the final examination. This written evidence serves the purpose of documenting the content and time of both company-based and vocational school training and thus makes the structuring of training transparent and understandable for all involved. The training record is one of the mandatory instruments for the securing of training quality in the dual system in Germany. It is enacted at the system level and deployed at the company level.²⁷

The BIBB Board Recommendation of 9 October 2012, which was revised on 1 September 2020, also deals with the keeping of training records (cf. BIBB-HAUPTAUSSCHUSS 2020). This Recommendation states that apprentices should complete their report booklet daily or weekly and that they should be encouraged to do so by their trainers. According to the BBiG, the latter are also assigned the task of inspecting the documentation on a regular basis and are required to check and countersign the entries at least monthly (§ 14 Paragraph. 2 BBiG).

Against this background, the instrument of the “training record” is accorded a high degree of significance in terms of process-accompanying for training (re)planning. For this reason,

²⁶ § 1 of the BBiG states: “The purpose of vocational education and training is to impart the skills, knowledge and capabilities (occupational proficiency) necessary in order to engage in a qualified occupational activity in a changing world of work within a regulated course of training. It should also enable apprentices to gain the requisite occupational experience”.

²⁷ See the multilevel model for the explanation of company-based quality assurance in the dual training system in Germany developed by DEQA-VET (cf. FEDERAL INSTITUTE FOR VOCATIONAL EDUCATION AND TRAINING 2017, pp. 37, 84 ff.).

both the quantitative and the qualitative survey in the research project asked whether companies use the training record and if so why.

5.2.2 Type of use, frequency of checks and objectives of use

One of the aims of the surveys of the training management departments is to obtain information on the way in which the training record is used in company-based training practice and on its relevance as a quality assurance instrument. As presented in the chapter on method, companies offering training in the cross-sectional occupation of office manager are somewhat larger in size than the average company providing training. This can mainly be observed in the crafts as well as somewhat less clearly in the other areas of training. As already mentioned, a higher tendency to deploy formal instruments is associated with the size of the companies providing training.

According to the results of the telephone survey, the keeping and checking of the training record is universal. None of the respondents stated that there was “no report booklet kept” at their own company or that the report booklet was “not checked at all”.

In the survey, companies providing training in the occupation of office manager using the report booklet in accordance with the stipulations achieved better results than all companies surveyed, the difference being between about six and eight percentage points. 88 percent of companies providing training (cf. Table 8, compared with 84 percent for all occupations) follow the Recommendation of the BIBB Board, of which 37 percent (as opposed to 27 percent) conduct checks at least every two weeks and therefore do so more frequently than the recommended minimum interval of one month (see Table 8). Ten percent (compared to 14 percent) check the report booklets only “at least every six months”, and one percent (as opposed to 2 percent) even only do so prior to the examinations. This leads to the conclusion that this group, at least as far as the company side is concerned, does not use the instrument of the training record for continuous, process-accompanying internal evaluation of training quality. The checks prior to the examinations seemed to be geared more towards the fulfilment of formal requirements associated with admission to the examination.

Table 8: Frequency of checks of the report booklet by area of training (in %)

Frequency	Crafts	Trade and industry	Public sector	All areas of training	For comparison: all occupations
At least weekly	26	26	33	27	19
At least every two weeks	8	9	15	10	8
At least monthly	58	56	33	51	57
At least every six months	8	8	17	10	14
Only prior to the examinations	0	1	2	1	2
Not at all	0	0	0	0	0
No report booklet	0	0	0	0	0

Note: the first three lines correspond to § 14 Paragraph 2 BBiG.

N = 237

This means that companies providing training in the occupation of office manager are disproportionately more active with regard to checking the training record pursuant to the BBiG. One supposition is that training staff at companies providing training in the occupation of office manager have a higher affinity with formal instruments than training staff for other occupations.

In a comparison between the areas of training, very high proportions of companies in the crafts sector (92 percent) and trade and industry (91 percent) follow the Recommendation of the BIBB Board. Surprisingly, the level of commitment in the public sector is lower (81 percent). This figure is ten percentage points below the average. The reasons for this are unknown. At the same time, however, the public sector has the highest proportion of companies which check the report booklet every week (33 percent).

Further questions were asked regarding the importance of keeping a report booklet for the two objectives of “Documentation of the course of training for the apprentice” and “Feedback on training status to the company” (see Tables 9 and 10). Both of these goals are viewed as being of similar importance in overall terms. In the comparison between the areas of training, a particular emphasis of both objectives can be identified in the crafts.

Table 9: Agreement with the objective of “Documentation of the course of training for the apprentice” with regard to keeping the report booklet (in %)

Documentation of the course of training for the apprentice	Crafts	Trade and industry	Public sector	All areas of training	For comparison: all occupations
Very important	43	24	33	31	39
Important	25	4,850	41	41	35
Less important	29	26	22	26	18
Not important	4	2	4	3	7

N = 117

Table 10: Agreement with the objective of “Feedback on training status to the company” with regard to keeping the report booklet (in %)

Feedback on training status to the company	Crafts	Trade and industry	Public sector	All areas of training	For comparison: all occupations
Very important	39	26	26	29	37
Important	43	44	48	44	34
Less important	14	26	22	22	20
Not important	4	5	4	4	9

N = 117

In contrast to the checking of the report booklet, the figures relating to these objectives are not consistently higher for companies providing training in the occupation of office manager than across all occupations. In the case of companies providing training in the occupation of office manager, 72 percent believe that keeping a report booklet for the purpose of the documentation of apprentices is important or very important. 73 percent think the same regarding

feedback on training status to the company. The corresponding figures for all occupations are 74 percent and 71 percent, respectively. There is thus no clear trend.

A comparison of these types of companies providing training, which considers agreement with these objectives for the crafts sector, only once again reveals a lead for companies providing training in the occupation of office manager. 82 percent of companies providing training in the occupation of office manager agree with the statement that keeping a report booklet is important with regard to the objective of “Feedback on training status to the company”. This figure is somewhat higher than in the overall survey (cf. Table 10), where only 69 percent of the companies providing training in the area of the crafts agree with this statement (cf. SCHREIBER et al. 2023, p. 55).

Within the scope of the telephone survey, the companies surveyed were afforded the opportunity to state further reasons for the keeping of a report booklet. Here too, the responses show that the companies providing training view the instrument of the report booklet as being equally useful both for the apprentices and for the company.

As far as the apprentices are concerned, the argument put forward is that keeping the training record fosters writing skills and personal competencies in the area of independence, such as learning capacity, self-organisation, self-control, discipline and autonomy. In addition to this, such a written routine facilitates continuous reinforcement and repetition of the learning material and use of the report booklet as a source of reference.

Several respondents gave answers pointing to the necessity of a completed report booklet for admission to the examination. A further frequent response is safeguarding the company in instances such as failure of the final examination. In such a case, the report booklet could be used to demonstrate to third parties that the prescribed training contents have been properly and fully imparted.

On the company side, many respondents to the quantitative telephone survey also emphasise the points of better overview and control. This relates firstly to the monitoring of performance and degree of task fulfilment on the part of apprentices (including at other learning venues) and secondly to the training performance of the company. The latter can also be ascertained via a comparison with the company training plan and/or the general training plan.

The opportunity to provide feedback or to engage in joint reflection on the contents and course of training is an aspect which is rarely mentioned, although the Board Recommendation states that the training record could offer a good foundation in this regard. In the qualitative interviews too, statements such as the following remain the exception.

“The training records need to be kept on a weekly basis, and we meet once a month for this purpose. [...] there is a regular appointment, during which we take time to discuss the contents”.
(0107, 48-54)

There are thus few indications of the existence presently of sufficient awareness or of established practice with regard to the “intensification of communication between employers providing training and apprentices” via, as the Board Recommendation puts it, “expanded models of the statutorily stipulated training record” (BIBB-HAUPTAUSSCHUSS 2020, p. 2). This could also mean that expanded forms of the report booklet, which stipulate aspects such as alignment by the apprentice of training contents to the occupational profile positions of the general training plan, are not yet very widespread or else at least are not being used for the purpose of mutual feedback.

By way of contrast, a broad degree of agreement is accorded to the objectives of control and monitoring, which take effect both in the case of the apprentices (self-control) and on the company side and facilitate relevant adjustments to quality during the course of training.

5.2.3 Handwritten or digital use?

The BIBB Board Recommendation mentioned above (cf. BIBB-HAUPTAUSSCHUSS 2020) gives the option of managing training records manually or electronically. In this regard, it notes that electronic editing is “increasingly in line with the media habits of apprentices and trainers” and that online-based software services permit control of the report booklet entries irrespective of time and place. For this reason, we wished to know from the companies whether they were using handwritten training reports, digital reports or both.

In the case of training in the occupation of office manager, the results of the telephone survey show a predominantly digital approach, either exclusively digital (50 percent) or both digital and handwritten (22 percent; cf. Table 11). Only one in three companies adopts a handwritten-only approach. By way of contrast, this category was the most frequently chosen in the overall survey, where it accounted for 64 percent of responses. Digital use of the report booklet in the occupation of office manager is thus significantly more widespread than in other training occupations. A high degree of accessibility to digital devices in an office-based workspace is likely to be a contributory factor in this respect.

Table 11: Use of a handwritten and/or digital training record by area of training (in %)

Use of the training record	Crafts	Trade and industry	Public sector	All areas of training	For comparison: all occupations
Handwritten	57	21	15	28	64
Digital	36	50	63	50	16
Both	7	29	22	22	21

N = 117

If only the training occupation of office manager is considered for the purpose of the comparison, then we can observe that digital use in the crafts (either exclusively or alongside a handwritten approach, 43 percent) is just over half as prevalent as at trade and industry companies (79 percent) and around half as widespread as at companies in the public sector (85 percent).

This result accords with the finding which emerges from the overall survey because crafts companies are disproportionately likely to be very small or small firms. This had shown that frequency of use of digital report booklet versions rises in line with increasing company size. The figure begins at three percent for companies with up to ten employees and climbs to 36 percent for companies with more than 500 employees. The highest figure for use of exclusively handwritten report booklets, 83 percent, is thus found amongst companies providing training which have fewer than ten employees (cf. SCHREIBER et al. 2023, p. 57).

Even though the telephone survey was conducted during the coronavirus pandemic, the expectation must be that dissemination of the digital report booklet is likely to have accelerated further in the meantime. As far as the present article is concerned, however, this must remain a thesis. Nevertheless, the qualitative interviews completed prior to the pandemic already illustrate the general perception of the companies that they are in a transitional phase.

This view was expressed by one government authority where the training record is “still completed by hand”. (0109, 98-101) Another interview with a training manager at a further government authority states environmental protection reasons which give rise to the expectation that paper versions will be abolished entirely.

“Let’s see whether we [...] can get rid of this paper thing [...] over the coming years, including for EMAS [Eco-Management and Audit Scheme] reasons [...]. This will all be revealed in the next few years, I think”. (0101, 197-197)

Irrespective of whether the report booklet is kept in digital or handwritten form, conceptual considerations are being undertaken regarding the further development of the training record in respect of the matching of occupational profile positions. In one interview, the suggestion was made that the idea of using a “catalogue of tasks” for medical assistants could be looked at.

“Whenever I complete a task, the company signs off the respective item. I think the notion of turning around this report booklet or the general training plan is actually not a bad one”. (0108, 74)

The proposal is not that apprentices should align aspects such as the serial numbers of the occupational profile positions to company tasks as prescribed in Annexes 3a and b of the Board Recommendation (cf. BIBB-HAUPTAUSSCHUSS 2020). The thinking instead is that these should be translated and stipulated in the form of tasks/activities. Links in digital versions of the report booklet would make this entirely feasible.

In the interview already cited, the general assessment is also expressed that the possible areas of use of digital versions of the training record have not yet been exhausted.

“We have introduced the electronic report booklet, but we could make much more use of it than we do. We could, for instance, move to a kind of learning status monitoring. This is something we haven’t done yet”. (0101, 197)

These examples indicate that, in principle, companies providing training are open to the potential offered by digital report booklets, even if they are not yet in use or have not been fully introduced. In addition to this, the stakeholders themselves still see areas of potential development for the digital report booklet. This could be viewed as a starting point for further endeavours to pursue the innovative further development of digitalised report booklets. The aim here would be to expand and strengthen the training record as a central instrument for the process-accompanying monitoring of training success.

5.2.4 Conclusion: The training record

At companies which provide training in the occupation of office manager, the report booklet is significantly more likely to be checked than at other companies. This applies across all three areas of training – the crafts, trade and industry, and the public sector. The frequency of checks in the public sector is particularly high. Only eleven percent of companies fail to meet the objective of monitoring the training record at least once per month. This compares to a figure of 16 percent for all occupations surveyed (cf. Table 8). This is a clear indication of more frequent use of this quality assurance instrument within the scope of training in the occupation of office manager than in other occupations.

The main study had already identified a clear correlation between company size and the likelihood of use of the training record for monitoring purposes. This difference does not in-

itally come as a surprise since companies providing training in the occupation selected here are disproportionately large on average. Nevertheless, the difference is very significant. From the perspective of the apprentices, the situation thus remains that their training record is more likely to be monitored if they are undergoing training in this occupation rather than in another – at least in average terms.

As far as the motives for maintaining the training record are concerned, however, the differences between companies with apprentices in the occupation of office manager and companies with apprentices in other occupations tend to be small. Nevertheless, there is evidence that crafts companies with apprentices in the occupation of office manager are more interested in this instrument for the control of the status of training (see Table 8) than crafts companies with apprentices in other occupations (cf. SCHREIBER et al. 2023, p. 54). It may be the case that the according of a somewhat higher level of significance to a formal written instrument such as the training record is inherent in this occupation. However, consideration needs to be given to the fact that crafts companies providing training in the occupation of office manager are of an above-average size.

Companies providing training in the occupation of office manager are pioneers in the digital deployment of the training record. This particularly applies in the case of the public sector and trade and industry (see Table 11). However, crafts companies providing training in this occupation are also ahead of companies which provide training in other occupations and which took part in the survey (ibid.). Even though effects exerted by company size are to be expected in this regard, too, apprentices in the occupation of office manager are significantly more likely to keep their training record digitally than would be the case for training in many other occupations.

► 6 Quality assurance via voluntary methods, procedures and instruments

One of the aims of the study is to shed greater light on whether further quality assurance procedures and instruments are deployed in practice alongside the instruments mandatorily stipulated in the BBiG (training record and training planning). Against this background, relevant questions were posed both in the telephone survey and in the qualitative interviews. Attention was directed towards methods and instruments which companies use to monitor whether apprentices have met learning objectives at a certain point in time.

The results of the telephone survey will be presented first. Training managers were presented with eight procedures and instruments which may be used during the training process. These comprised the two non-standardised methods of “observation” and “spontaneous discussions” and six control instruments which are categorised in a standardised form here. This takes place with the awareness that boundaries are fluid. “Observation”, for example, can be categorised as non-standardised in this study. But it may also take place in a more or less standardised manner. The latter is the case when a trainer observes an apprentice at regular intervals and at certain times or when the trainer may make standardised notes after observing the apprentice.

Table 12 provides an overview of how frequently companies make use of the eight instruments for the monitoring of training progress. The two non-standardised instruments of “observation” (93 percent) and “spontaneous discussions” (87 percent) are the most prevalent vehicles deployed by companies alongside assessment of vocational school marks (89 percent). These are followed by “scheduled discussions” (71 percent) and joint evaluation with the apprentices (66 percent). In addition to this, just over one in two companies monitors agreements previously made or uses appraisal forms. Evaluation not involving those affected, however, takes place at only four in ten companies.

Table 12: Monitoring the status of training via various means (in %)

Monitoring tools	Crafts	Trade and industry	Public sector	All areas of training	For comparison: all occupations
Observation	96	96	85	93	96
Ad-hoc discussions	94	86	85	87	89
Scheduled discussions	52	74	81	71	44
Written assessment or appraisal forms	26	52	73	51	29
Joint evaluation by all training participants not including the apprentice	44	41	33	40	39
Joint evaluation by all training participants including the apprentice	74	68	56	66	60
Monitoring the results of agreements	46	57	54	5	46
Regular evaluation of vocational school marks	86	90	88	89	90

N = 238

The total of instruments deployed per company was calculated in order to provide a summary of the frequency of deployment of these instruments in the areas of training. The five instruments not used by almost all companies (scheduled discussions, appraisal forms, joint evaluation with/without the apprentice, monitored agreements) were also included. Just under three of these instruments are deployed on average (cf. Figure 3). The public sector and trade and industry are close together in that they each use around three instruments. Just under two and a half instruments are deployed in the crafts sector.

Figure 3: Number of control instruments used by area of training (from five instruments)



$N = 238$

Vehicles of voluntary quality assurance will be considered in greater detail below, whereby no distinction will be drawn between non-standardised and unregulated quality assurance methods and instruments and such methods and instruments which display a higher degree of regulation.

More detailed findings relating to the first group of methods will be examined more closely before we move on to an investigation of the second group.

6.1 Voluntary non-standardised quality assurance methods

The voluntary non-prescribed methods which are deployed in an ad hoc and non-standardised way in training practice include “observation” and “spontaneous discussions”. They serve the purpose of ongoing monitoring of competency acquisition by apprentices and, as the results of the telephone survey show, are the most widespread.

Observation and spontaneous discussions with apprentices

In the telephone survey, 93 percent of the companies providing training stated that they use observation of the apprentices to monitor the status of performance (see Table 12). As a comparison with the overall survey shows, the occupation of office manager does not hold a special position in this regard. A similar figure is recorded for observation (96 percent in the case of the 18 occupations).

After “observation”, the next greatest frequency occurs for the standardised measure of “regular evaluation of vocational school marks” (89 percent) and for the unregulated measure of “spontaneous discussions with apprentices” (87 percent). With regard to these ad hoc discussions, there is a conspicuous gap of just under ten percentage points between the areas of the crafts (94 percent) and the public sector (85 percent). It is therefore possible to conclude

that the non-standardised means of observation and spontaneous discussion play a lesser role in the public sector compared to the other areas of training, even though this does not apply to the same degree for all non-standardised methods.

The significance of observation and communication for training support and monitoring is also underlined by the fact that five of the 13 qualitative interviews with companies providing training in the occupation of office manager do not make any explicit reference to the relevance of non-standardised competency monitoring in the form of continuous collaboration or togetherness. When asked how the company evaluated success during training, the training manager at a medium-sized crafts company replied that the colleagues with whom the apprentices were together would “see” the successful outcome of the work. (0102, 64-65)

The training manager at a local government institution in the public sector put it in the following terms:

“We are constantly working with the apprentices. This means that you notice the nature of the progress. Can they already complete the tasks autonomously? So, we experience a daily togetherness [...]”. (0103, 90-95)

Within the context of how the company prepares apprentices for the examination, it is stated in another part of the interview that this takes place (alongside examination preparation courses) “[...] through daily routine work, during which they are always watched to see that they are making good progress”. (0103, 105-116)

In another case study, the interviewee expounds that looking back at the end of training “has fortunately not [brought] any great surprises thus far because we have a good and close relationship during the course of training itself”. This interviewee then goes on to say: “And even if there are some things which may have not gone ideally, then these mostly pop up during the course of training”. (0108, 106-109)

The training manager at a large chain of companies operating nationwide stated:

“My fundamental attitude at all times is that the whole of the period of training is ultimately examination preparation”. In another part of the interview with the same company, we hear that “this constant networking and regular watching” were “absolutely essential”. (0110; 74-76, 86-91)

It is notable that an absence of communication is also used to undertake evaluations of training success. This is, for example, the case when there have been no complaints from the apprentices and where this is interpreted as an indication that the status of performance is right and that the apprentices feel sufficiently well prepared for examinations. (0109, 119) The training manager at an electrical company expressed the expectation that, in the event of problems, “[...] apprentices [should] not be afraid to approach us”. In this way, a lack of feedback on the part of the apprentices is evaluated as a positive assessment of the training situation.

These quotations provide indirect evidence of trusting the apprentices to be able to categorise and evaluate the things they have perceived during the training process. This is a reference to the factor of know-how on the part of the company providing training. This institutional self-confidence in didactic and organisational capabilities also finds general expression in one interview in the circumstance that the training managers are referred to as “old hands” who “have a grip on everything”. Speaking of his own company, the interviewee also states that “we have been providing training for a very, very, very, long time”. (0109, 123-125) This suggests

a fundamental conviction that a training company with many years of expertise will be able to meet the requirements created when providing VET.

The explanations given by a master baker on the specific nature of young people in post-puberty shows that this (life) experience is categorised as a key aspect but that young people may also encounter tangible challenges.

“[...] you will have woken up by the time you’re 17 or 18, but some people reach a peak at 16 and then seem to go to sleep. But that’s puberty, it creates total confusion. [...] Of course you think about the apprentices as people. You experience so much in a life of self-employment. I’ve been self-employed for nearly 30 years. [...] You think you’ve seen everything, but you haven’t”. (0113, 129-131)

A further aspect is that some companies tend to rely more on the perception and evaluation of staff with (life) experience to provide training than on the effectiveness of quality assurance elements, as the following quotation expresses.

“Of course you need the people to do it. Here we have a commercial assistant. She doesn’t hold a trainer aptitude qualification, but as a mother of two daughters she is simply prepared in human terms to take a young person by the hand”. (0113, 26)

In summary, we can conclude that companies view the foundation for the monitoring and securing of training success to consist of ongoing contact with apprentices in conjunction with the means of observation and the company’s own training culture and capability. For the vast majority of companies providing training in the occupation of office manager which were included in the survey, a continuous “presence” and “observation” possess a high degree of relevance with regard to monitoring of company training.

Use of quality assurance procedures which do not tend to be standardised achieved the highest scores across all occupations. The three most frequent responses were “observation”, “evaluation of vocational school marks”, and “ad hoc discussions”. They thus form the backbone of process-accompanying training monitoring. Observation and ad hoc discussions are mentioned somewhat less frequently in the public sector, where the standardised quality assurance procedures of “scheduled discussions” and “written assessment or appraisal forms” are more likely to be deployed than in other areas of training. The interviews reflected a clear awareness that experienced training staff are required for “observation” and for the conducting of ad hoc discussions. These employees also need to be in possession of the relevant communication and social skills.

6.2 Voluntary standardised quality assurance methods

Standardised quality assurance procedures which are not mandatorily prescribed will be considered below. These comprise six of the total eight instruments which were stipulated as response options within the context of the telephone survey.

Discussion and assessment meetings and evaluation forms

Planned discussion and assessment meetings are an example of standardised quality assurance procedures and methods. They constitute a prerequisite for binding agreements which are drawn up together with the apprentices and other training participants. Such measures place high demands on those involved in terms of time and planning requirements, especially for

the companies, and also need relevant expertise. At the same time, these tools provide a high degree of transparency and understandability for all participants, particularly if the results of meetings or evaluations are documented in writing.

Singling out “written assessment and appraisal forms” as an example, we already know from the qualitative interviews that this instrument is especially deployed by companies which already have more differentiated written company training planning and quality assurance in place. The telephone survey shows that, compared to the overall survey (29 percent), the likelihood that companies providing training in the occupation of office manager will use the instrument of the appraisal form is 22 percentage points higher (51 percent) (see Table 12). This indicates that, compared to other occupations, training in the occupation of office manager is significantly more likely to be additionally monitored via the use of voluntary standardised instruments which require higher planning, communication and time resources with regard to the necessity of reaching agreements and arrangements.

A comparison of the figures in the three areas of training produces sharply deviating figures in some cases. Written assessment or appraisal forms are used by 26 percent of the crafts companies interviewed which provide training in the occupation of office manager. The corresponding figure in the area of trade and industry is 52 percent. In the public sector, as many as 73 percent of companies providing training in the occupation of office manager use written assessment or appraisal forms.

We know from the overall survey that small companies providing training are fundamentally less likely to use previously scheduled written monitoring procedures. This is also true of companies providing training in the occupation of office manager. Only seven percent of the smallest companies providing training represented in the sample use evaluation forms. However, the use of such forms reaches 77 percent for larger companies.

Review

Full quality assurance encompasses both process-accompanying monitoring and an evaluation at the end of the training process. Such an evaluation review can initially be aligned to the third phase (“Check/Review”) of the EQAVET Quality Assurance Reference Framework. If findings acquired via this route then become the starting point for adjustments to future courses of training, then the instrument of review also forms part of the fourth phase (“Act”) of the EQAVET Reference Framework. Reviews are also testimony of the willingness of a company to view itself as a learning organisation. Against this background, the companies providing training were asked whether they conducted a review at the end of training.

Within the scope of the telephone survey, 73 percent of companies²⁸ providing training in the occupation of office manager (62 percent in the overall survey) stated that they carry out a review at the end of training. This takes place either with the respective apprentices only or with more than one training participant. In the case of companies with at least 250 employees, the likelihood that both versions together will occur is seven percentage points higher than at small companies. A review involving more than one participant in training but not the respective apprentices plays a very small role (average of 4%).

²⁸ In the telephone survey, individual questions were only directed at one in two companies providing training. These questions were put to 129 of the 238 companies which provide training in the occupations of office manager, although not all companies answered all questions.

Table 13: Conducting a review after conclusion of training (in %)

Review	Crafts	Trade and industry	Public sector	All areas of training	For comparison: all occupations
Yes, with the apprentice	14	25	40	26	25
Yes, with the apprentice and further participants	62	40	32	42	33
Yes, with further participants but without the apprentice	5	1	12	4	3
No	19	34	16	27	38

N = 114

38 percent of companies questioned in the overall survey stated that they did not conduct a review. This is disproportionately likely in the areas of the crafts (42%) and hospitality (33%). The figures for the occupation of office manager only show that non-participation by crafts companies is 19 percent, half of the above figure. This means that frequency of use of the instrument of the review depends on the crafts occupation in which training is being provided.

Discussions at the end of training have two functions. Firstly, they are used as a review of the course of training. Secondly, such discussions are directed towards the future, especially if apprentices are to be taken on permanently.

“[...] on the last day of training, I would say that the focus is on the future rather than on the past”. (0106, 181-184)

“[...] we conduct discussions with our apprentices about offering them permanent employment. We carry these out together with our colleagues from the Human Resources Department, and we also review things with our apprentices once more. How did it go? What could we improve? Was there anything which was not covered?” (0108, 106-110)

“Yes, we have feedback discussions of a sort. They begin in the final six months and are linked to looking at where we can accommodate the apprentices and in which department they would like to be employed”. (0104, 126-129)

These statements demonstrate that a clear separation between review and future planning is not necessarily deemed to be important in these discussions. The consequence of this may be that reviews are not perceived as such.

“It’s not as if we all sit down together and talk about what went well, what went badly and where we need to follow up? Of course, we meet up with the trainers in our department to speak about it again. Then we look what we can do better or differently for the future. We do this when we see a need for improvement somewhere”. (0109, 123-125)

However, there are likely to be very large variances with regard to the degree of differentiation. No quantitatively robust statements can be made in respect of the number of cases in which the results of reviews are recorded in writing. The qualitative interviews suggest that the deployment of formalised survey forms is not found as a general standard.

“A joint review and forecast of this type is definitely planned, but it takes place on the basis of discussions rather than via a standardised questionnaire”. (0110, 86-91)

6.3 Conclusion: Quality assurance via voluntary methods, procedures and instruments

Alongside the evaluation of vocational school marks, non-standardised procedures (observation, spontaneous discussions) are the most common amongst companies providing training in the occupation of office manager, being used by around 90 percent of such companies. The further five instruments stated, which can be considered to form part of the standardised methods of quality assurance, are still used by more than half of the companies. The only exception in this regard is joint evaluation by all training participants not including the apprentice (40 percent).

Ongoing contact with apprentices in the daily training routine, which is a prerequisite for the use of the methods “observation” and “spontaneous communication”, thus forms the foundation of quality assurance in training practice. Such procedures are also based on a self-evident notion which views relevant expertise on the part of the company and the training staff as being necessary and already in place. This finding is confirmed by the main study, which relates to training practice in 18 occupations in the dual system. The considerable relevance within training practice of non-standardised quality assurance procedures, such as observation and spontaneous discussions, is thus expressly reinforced.

It should be noted that the more highly regulated standardised methods of quality assurance have more prerequisites. They place higher demands on training staff and their competencies in terms of time, administration, communication and planning. The evaluation approach adopted in the case of “written assessment and appraisal forms” was used as an example to show that the likelihood that such methods will be used at companies providing training in the occupation of office manager is 22 percentage points higher than in the overall survey. This supports the finding that additional voluntary quality assurance methods are used comparatively more frequently during training in the occupation of office manager, although this is not true of companies providing training which are in the smallest size category.

Complete quality assurance of training further encompasses an evaluatory review, which may be aligned to the third or fourth phases of the EQAVET Quality Framework (Plan, Do, Check, Act) and is also one of the standardised voluntary methods. Use of the review amongst the companies providing training in the occupation of office manager which were investigated is 73 percent. Compared to the overall survey, this figure is 11 percentage points higher. The difference in the crafts sector is even as much as 23 percent. Within the training context of this occupation, there is thus a clear tendency for the quality assurance procedure of the review to be deployed more frequently than in the case of training in other occupations. Evaluation of the qualitative interviews revealed that a review is motivated more by the objective of securing a supply of qualified skilled workers than by the aim of quality assurance. Discussions thus focus on permanent employment for the apprentice rather than on the evaluation of the training process or of training outcomes. It becomes clear that a formalised review where the results are recorded in writing in a systematised fashion in order to render them usable for any future adjustments that may be required is not likely to constitute the rule. In practice, reviews usually appear to form a part of discussions which tend to be of an informal networking character.

To sum up, we may say that further voluntary quality assurance procedures and instruments are used in addition to the mandatory instruments of training planning and the report booklet in order to monitor the respective status of training in a process-accompanying manner. Comparatively speaking, training participants within the scope of training in the occupation of office manager act in a more committed way than is the case within the context of training in

the other occupations forming an object of investigation. The basis for this is a fundamentally more frequent use of standardised quality assurance instruments, which include evaluation forms and the method of the review.

► 7 Overall conclusion

Separate consideration of the planning and structuring of training in the training occupation of office manager has essentially shown a comparatively strong degree of commitment in the field of quality assurance within the training system. This picture is revealed when the analysis results of the empirical material (238 telephone interviews with training managers and 13 company case studies) are compared with those for the 18 occupations in the main study.

- The likelihood that the training of office managers will be planned in writing is just under 25 percentage points higher.
- The report booklet is also significantly more likely to be used in accordance with the Recommendations of the BIBB Board (cf. BIBB-HAUPTAUSSCHUSS 2020) (with regard to systematised monitoring).
- More frequent deployment of voluntary standardised quality assurance instruments (such as evaluation, feedback and review) can be ascertained.
- In addition to this, digital use of the report booklet is more widespread than in other training occupations.

Why is this the case? Office managers are trained at companies which are on average larger than companies providing training in other occupations. Since on average larger companies have a more pronounced tendency to plan and organise their training services in a written and standardised way, this may form part of the explanation for the findings stated above. Another thesis is based on the high degree of writing that is inherent within the training occupation of office manager. The consideration here would be that using written planning instruments during training whilst also deploying them in an elaborated and formalised form would be in line with the planning-related and administrative way of working which is typical of the occupation. Moreover, the fact that accessibility to digital devices in the usual workplaces of office managers is in place anyway could help to explain the greater use of digitalised training report booklets. However, the exact nature of the correlations here would need to be subjected to separate investigation. This also needs to be viewed against the background that office manager is one of the so-called “major” training occupations and is in great demand amongst young people²⁹. The survey also shows that there are no appreciable recruitment problems. Other challenges, which may be listed under the keyword of “quality problems”, such as training drop-outs and poor examination marks, occur somewhat less frequently, too. The question as to the extent to which the higher degree of commitment to quality assurance in VET could be a causal factor must remain unanswered at this point. The supposition, however, is that a simple cause-effect explanation along the lines of “there are fewer quality problems because of better quality assurance work” probably falls short of the mark.

The following individual findings emerge with regard to type of training planning. The deployment plan plays a fundamental role. It sets out all the stages and operational areas to be passed through in the course of training and stipulates the time frame. The companies’ content training planning, insofar as this is in place, is generally based on this type of planning. Content training planning may be elaborated to differing degrees. It can range from plans which merely

²⁹ There is surplus of persons seeking a training place in this occupation (cf. BUNDESINSTITUT FÜR BERUFSBILDUNG 2025).

constitute a bullet point list of occupational profile positions from the respective training regulations to more detailed documents which include the company's interpretation of the individual occupational profile positions in the form of specific tasks and objectives and didactic and pedagogical stipulations (see Chapter 5.1.1).

The highest level of differentiation and complexity in “content planning” (category 4) and its use in the 13 cases investigated in this study is achieved in the following circumstances:

The company translation of the occupational profile-related skills, knowledge and competencies specified in the training plan is encapsulated within a written plan both with regard to organisational aspects (stipulation of learning venues, operating times, responsibility of the training personnel) and in respect of content and didactic elements. The latter may be presented in the form of specific tasks and work processes which ultimately need to be completed or mastered by the apprentices. In addition, the planning specifications are recorded in a multifunctional tool which also includes further quality assurance instruments, work aids and functions such as information and documentation materials and feedback tools. This is intended to specifically promote process-accompanying support for the training process and continuous monitoring of training success. In addition to this, such multifunctionality may lead to achievement of the goal of addressing all four phases of the quality cycle (Plan, Do, Check, Act) pursuant to the EQAVET Quality Assurance Framework. Another notable development is when apprentices are part of the company's translation work in the training framework plan via an individual training plan. This way, together with the training personnel, apprentices can co-design parts of the plan and adjust them as needed.

The planning documentation used for training in the occupation of office manager – if such documentation is in place – is fundamentally drawn up in conjunction with the training management department via a process of division of labour. However, training staff in the operating departments are accorded a high degree of autonomy with regard to the practical implementation of company training planning. Firstly, this indicates a considerable amount of trust in the skilled workers providing training in the workplace. On the other hand, it may also signal insufficient support for the practical work performed by these training staff. Introduction by the training management department of quality assurance instruments which aim to achieve improved communication between the stakeholders involved in training could strengthen networking and knowledge transfer inside the company.

Training participants view training regulations as minimum standards. The empirical material demonstrates that exceeding these standards is frequently an explicit goal. These further company training objectives encompass communicative and social competencies and personal development in addition to comprehensive occupational proficiency. The quality assurance instruments deployed by the companies are situated within the context of the respective training culture and of the training objectives associated with this, even though this only occasionally becomes explicit. The aim is for them to facilitate achievement of the desired developments.

One of the results of this study with regard to the structuring of the training regulations for the occupation of office manager is that merging the contents of Annexes 1 and 2 may support companies in translating the contents of the general training plan into the company context. The study shows that this takes place on a respective individual basis at many companies. The training regulations of 2025 have now conflated the content and time stipulations.

We may conclude that, compared to other occupations, the quality assurance aspects of training in the occupation of office manager are more likely to take place in a written, elaborated and detailed form. This means that a higher degree of differentiation and transparency and an understanding of the binding nature of processes may be expected within the scope of training. Such general conditions could certainly exert a positive impact on the attractiveness of the training occupation. In overall terms, therefore, a positive picture emerges with regard to quality assurance in vocational education and training. Imitation may be encouraged, even though there is also sufficient scope for improvements. Particular attention here is drawn to the benefits of quality assurance approaches, which use differentiated meta tools or sets of instruments as vehicles to address all process phases of training. Greater dissemination of these would be desirable.

The aim of such instruments is to enable planning and implementation of training to be monitored in a process-accompanying manner with regard to completeness and quality in order to make any necessary adjustments visible. Planning sets are already being deployed at different levels of elaboration by a series of companies forming the object of investigation. Reference is made in this regard to a recommendation developed in the main study to strive for digital linking and integration of relevant quality assurance instruments whilst taking the report booklet as a starting point (cf. SCHREIBER et al. 2023, p. 106). This could permit the addressing of areas of potential identified regarding closer collaboration between training management departments, training managers and skilled workers providing training in the operating departments. The material investigated was also found to contain too few indications of the dissemination of sufficient awareness amongst companies providing training that the report booklet is a means for achieving “intensification of communication between employers providing training and apprentices” (BIBB-HAUPTAUSSCHUSS 2020, p. 2), as is formulated as an objective in the respective Board Recommendation. In the interests of improved quality assurance, relevant approaches which benefit the quality of company-based training would appear to be useful in this respect, too.

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► List of authors

Helena Sabbagh

Academic researcher in the “Innovative Further Education, Permeability, Pilot-Projects” Division at the Federal Institute for Vocational Education and Training. Head of the German National Reference Point for Quality Assurance in Vocational Training (DEQA-VET)

E-mail: sabbagh@bibb.de

Dr. Hendrik Biebeler

Academic researcher in the “Industrial and Technical Occupations” Division at the Federal Institute for Vocational Education and Training

E-mail: biebeler@bibb.de

► Abstract

The present study looks at the instruments and procedures deployed by companies to ensure successful training in the occupation of office manager. The investigation facilitates an insight into the specific design and use of planning and structural tools in training practice. Alongside the mandatory elements of the company training plan and the report booklet, these include further voluntary evaluation and feedback measures. 238 telephone-based interviews with training management departments and 13 company case studies relating to the occupation of office manager were evaluated in the study. The three areas of training – the crafts, trade and industry and the public sector – were compared with one another.



The present study looks at the instruments and procedures deployed by companies to ensure successful training in the occupation of office manager. The investigation facilitates an insight into the specific design and use of planning and structural tools in training practice. Alongside the mandatory elements of the company training plan and the report booklet, these include further voluntary evaluation and feedback measures. 238 telephone-based interviews with training management departments and 13 company case studies relating to the occupation of office manager were evaluated in the study. The three areas of training – the crafts, trade and industry and the public sector – were compared with one another.

Federal Institute for Vocational Education and Training
Friedrich-Ebert-Allee 114 – 116
D-53113 Bonn

Phone: +49 228 107-0

Web: www.bibb.de

Email: zentrale@bibb.de



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Federal Institute for
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