



**ENTREPRENEURSHIP  
WITHOUT BORDERS**

**TOOLBOX FOR  
TRAINERS  
—  
ECVET  
CURRICULUM  
AND TRAINING  
MATERIALS**



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# Introduction

This document presents the “**Entrepreneurship without Borders**” **Toolbox for trainers** is the final outcome of Work Package 2 (WP2) of the Entrepreneurship without Borders (ESF) project (N°2024-FR01-KA220-VET-000256552), part of the Erasmus+ programme.

The project is implemented by the ESF partnership, which comprises seven partners from six EU countries (CY, FR, IE, EL, ES, DE), as follows:

- Union of Incubators (UCE), Project Coordinator, FR
- Aspon Consulting, CY
- CDE Petra Patrimonia, FR
- INNOQUALITY SYSTEMS LIMITED, IE
- ERGON TRAINING NON-PROFIT CO., EL
- Circulo de Excelencia Educativa, ES
- VOLKSHOCHSCHULE IM LANDKREIS CHAM EV, DE

The project aims to strengthen entrepreneurship education within Vocational Education and Training (VET), preparing learners to thrive in a rapidly evolving world where creativity, innovation, and adaptability are essential. The project focuses on enhancing the accessibility, quality, and inclusiveness of VET entrepreneurship programs, particularly for disadvantaged learners, by integrating experiential learning, immersive technologies, and personalized learning pathways.

To achieve these goals, the project pursues several specific objectives:

- **Promote inclusive and experiential learning environments** by developing a virtual “entrepreneurship residence” where learners collaborate with peers from diverse backgrounds and receive mentoring and guidance from experts and stakeholders in the entrepreneurial ecosystem.
- **Support disadvantaged learners** through the use of immersive technologies, personalized learning paths, and digital tools—including a virtual mentor chatbot—that foster engagement, intrinsic motivation, and measurable learning outcomes.
- **Innovate VET entrepreneurship programs** by adapting business accelerator and temporary residency concepts to vocational training, ensuring alignment with current and future labor market and societal needs.
- **Focus on the development of key skills** such as creativity, problem-solving, and teamwork through participatory, experiential learning environments that simulate real-world entrepreneurial challenges.
- **Strengthen VET trainers’ competencies** in entrepreneurship, active learning, experiential learning, and assessment through a modular online training program that supports professional development and recognition of prior learning.
- **Provide practical tools and techniques** for trainers to implement innovative pedagogical approaches, including the adaptation of business accelerator and temporary residency concepts to VET contexts.

Through the integration of these approaches, the ESF project fosters a dynamic ecosystem for entrepreneurship education, enabling trainers to deliver high-quality, learner-centred programs and empowering learners to acquire the knowledge, skills, and attitudes needed to succeed in an innovative and competitive professional landscape.

The "Entrepreneurship without Borders" Toolbox for trainers has been developed with the overarching aim of strengthening the capacities of VET trainers in entrepreneurship education. Recognizing the pivotal role trainers play in fostering entrepreneurial mindsets, this Toolbox offers a comprehensive set of resources, guidance, and innovative training content to enable engaging, immersive, and learner-centred approaches.

WP2 specifically focuses on equipping trainers with competencies across three interrelated domains: entrepreneurial skills, active pedagogy, and assessment. The Toolbox provides a structured framework for trainers to develop knowledge and practical expertise in business creation, management, and financing; adopt innovative and interactive teaching methods tailored to diverse learning styles; and implement effective assessment strategies, including formative and summative approaches with constructive feedback.

The Toolbox consolidates several key outputs designed to support trainers in enhancing their professional practice:

- A **Competence Framework** aligned with European (EQF) and ECVET standards, defining the essential skills required for high-quality entrepreneurship training.
- The **“Entreprendre sans frontières” training program**, a modular and flexible curriculum that integrates experiential learning, pedagogical innovation, and assessment strategies to support the development of entrepreneurial competencies.
- An **Educational Guide** providing practical tools and case studies for adapting business accelerator and temporary residency concepts to vocational training contexts, fostering immersive and dynamic learning experiences.
- An **E-learning Platform** that facilitates flexible access to training resources and enables trainers to validate their acquired competencies through an ECVET-equivalent certification.

Together, these resources create a cohesive ecosystem for trainer development. By harmonizing practices, offering concrete methodologies, and providing flexible learning opportunities, the Toolbox empowers VET trainers to deliver high-quality entrepreneurship education and better support learners—especially those facing social or educational disadvantages—in developing entrepreneurial knowledge, skills, and attitudes.

Total Time:

**6** hours

# Learning Unit 1

# The Entrepreneurial Mindset

# Learning Unit 1- The Entrepreneurial Mindset

## Definition/What is this about?

This unit aims to equip entrepreneurship trainers to support future business creators in three key areas:

- Understanding what it means to be an entrepreneur and deconstructing preconceived notions about entrepreneurship.
- Identifying the key values, qualities and attitudes for entrepreneurs.
- Initiating a reflection on how to transform an idea into a concrete project.

This unit offers a series of theoretical content to strengthen trainers' knowledge of these key issues. The training content is based in particular on the European reference framework for entrepreneurial competences, Entrecomp (see bibliography), which lists and defines the 15 competences associated with entrepreneurship.

The theoretical content is accompanied by suggested activities for trainers to implement with their entrepreneurial learners.

## Learning Objective/What can I learn?

**By the end of this unit, participants will be able to:**

- Define the personal and professional qualities required to be a business leader including the key psychological aspects of early-stage entrepreneurship: resilience, managing failure and uncertainty...
- Analyse and facilitate an individual's motivations for starting and running a business
- Explain the institutional framework for business creation in Europe and in their own country in more detail and help learners to develop an ecosystem for entrepreneurship.
- Explain the methods related to developing a development strategy, partnership and collaboration.
- Develop engaging activities, to encourage learners to test their entrepreneurial attitude and to evaluate their choices and business projects from a critical point of view.

## Introduction/What is included?

1. What does it mean to be an entrepreneur? - 1 hour
  - a) The Entrecomp reference framework
  - b) Entrepreneurship and preconceived notions
  - c) Why want to be an entrepreneur?
  - d) What is the role of entrepreneurs in society?
2. The values and qualities of entrepreneurs - 3 hours
  - a) My values and my project
  - b) The qualities of an entrepreneur
  - c) The attitudes of an entrepreneur
3. Launching a business project - 2 hours
  - a) The entrepreneur's environment
  - b) From idea to project - on the way to Unit 2

## Contextualization / Why do I need to invest my time on this?

Helping future entrepreneurs understand the economic and societal environment of business creation and become aware of the skills needed to manage a business are essential steps in properly understanding the process of creation and, in some cases, abandoning a project before it fails.

The role of the trainer in this area is mainly to support learners' personal reflection and self-assessment of their skills. Above all, it is a question of helping them to 'reveal' their creative abilities, to understand the social, economic and regulatory environment in which entrepreneurs operate and how to interact with this environment.

## Theoretical Approach

### 1. What does it mean to be an entrepreneur?

**Objective:** Define entrepreneurship, explore the motivations and role of entrepreneurs in society.

#### a. The Entrecomp Reference Framework

EntreComp is a reference framework developed by the European Commission (see bibliography) to define and promote entrepreneurship (or entrepreneurial spirit) as a key competence accessible to all European citizens. It aims to build consensus among stakeholders (education, the world of work) and stimulate entrepreneurial skills, whether for business creation or for the creation of social, cultural or financial value in other contexts.

EntreComp is structured around three main areas, each comprising five competences, for a total of 15 competences:

IDEAS & OPPORTUNITIES	RESOURCES	IN ACTION
<ul style="list-style-type: none"><li>▪ Spotting opportunities</li><li>▪ Creativity</li><li>▪ Vision</li><li>▪ Valuing ideas</li><li>▪ Ethical and Sustainable thinking</li></ul>	<ul style="list-style-type: none"><li>▪ Self-awareness and self-efficiency</li><li>▪ Motivation and perseverance</li><li>▪ Mobilising resources</li><li>▪ Financial and economic literacy</li><li>▪ Mobilising others</li></ul>	<ul style="list-style-type: none"><li>▪ Taking the initiative</li><li>▪ Planning and management</li><li>▪ Coping with ambiguity, uncertainty and risk</li><li>▪ Working with others</li><li>▪ Learning through experience.</li></ul>

Entrecomp defines these skills in a broader context than business creation, as they are considered by the reference framework to be the skills necessary to develop initiatives in the broadest sense (the ability to undertake something, including actively exercising one's citizenship).

In the context of ESF training, however, they can be considered as the main skills necessary for business creators.

#### b. Entrepreneurship and preconceived ideas

Entrepreneurship is often perceived through persistent clichés: 'You need a degree in management,' 'It's only for young people,' or 'You have to be willing to sacrifice everything.' However, recent statistics and studies show a much more diverse reality. According to [INSEE](#), in 2022, more than 60% of business creators in France were under 40 years old, and nearly 40% were women. In addition, their backgrounds are varied: some entrepreneurs come from technical sectors (engineers, craftsmen), others from artistic or social fields. Entrepreneurship is not synonymous with immediate success either: in France, only 40% to 50% of businesses survive after 5 years ([INSEE](#)), which highlights the importance of preparation and resilience.

Preconceived ideas have a real impact on access to entrepreneurship. For example, the fear of failure, often amplified by stereotypes, can deter potential project leaders. However, studies such as that by the [OECD](#) show that entrepreneurs who have experienced previous failure are more likely to succeed on a second attempt, thanks to the experience they have gained. It is therefore crucial to deconstruct these myths in order to encourage an inclusive entrepreneurial culture.

### ✓ The “Clichés”

Here is a list of the main misconceptions to be deconstructed with the group of learners:

- **Easy/quick:** Entrepreneurship is easy and quick

In reality, most entrepreneurs face significant challenges, and success requires sacrifice, effort and perseverance.

- **Brilliant idea:** only those with a brilliant or revolutionary idea can succeed in entrepreneurship.

Many successful businesses are based on simple ideas, and creativity is not enough if it is not accompanied by other qualities such as responsiveness, adaptability, management skills, etc.

- **Risky:** entrepreneurs must take reckless risks

Not all entrepreneurs are poker players! Although many of them enjoy a challenge, entrepreneurs tend to minimise risks and anticipate them by implementing appropriate strategies.

- **Loneliness:** entrepreneurs work alone.

It is important to build a network and forge partnerships. Even micro-entrepreneurs and self-employed entrepreneurs, such as those targeted by the ESF project, work in a collaborative environment.

- **Expensive:** it takes a lot of money to start a business.

While it is true that start-up capital is always necessary, the amount of capital required will depend heavily on the initial project. Not all projects require significant start-up investments, for example, service provision activities.

- **Being young:** entrepreneurship is reserved for young people

Entrepreneurship is sometimes associated exclusively with youth, underestimating the contributions and successes of older entrepreneurs.

- **Rich:** starting a business automatically leads to financial success

Many people think that starting a business automatically leads to quick financial success. But return on investment often takes time.

- **Personal life:** being an entrepreneur means sacrificing your personal life.

The misconception that being an entrepreneur means sacrificing your personal life, overlooking the possibility of a work-life balance.

- **Inaccessible:** *entrepreneurship is out of reach for most people due to financial barriers or specialised knowledge, or depending on their level of education.*
- **Being a man:**

According to the [Rose Review of Female Entrepreneurship](#), 40% of women in the OECD countries believe it is harder for them to start a business than it is for men.

### ✓ **The reality:**

The typical profile of a European entrepreneur (Sources: [OECD](#), [INSEE](#), [Euronews](#), [entreprises.gouv.fr](#)) in Europe (2024-2025)

- **General dynamics**

In 2022, the European Union recorded 3.4 million new businesses created, compared with 2.8 million closures, representing a positive balance. This trend reflects entrepreneurial vitality despite recent economic crises.

- **Age and gender**

Average age: Overall European data is not as detailed as that for France, but the trends observed in France (average age of 35, rejuvenation, high proportion of under-30s) are often representative of Western Europe, particularly for micro-enterprises and start-ups [INSEE](#).

- **Women entrepreneurs:**

The proportion of women among business creators is on the rise in several European countries, reaching around 40% in France and some Nordic countries. In Europe, this proportion varies from country to country, but the trend is towards the feminisation of entrepreneurship [INSEE](#).

- **Type of business and growth sectors**

Micro-enterprises: As in France, micro-enterprises dominate start-ups in many European countries, mainly due to administrative simplicity and lower tax burdens. They often account for more than 50% of new businesses ([entreprises.gouv.fr](#)).

Sectors: Services, digital technology, commerce and activities related to the ecological transition are the most dynamic. Tech start-ups benefit from a favourable ecosystem in countries such as France, Germany, the Netherlands and the Nordic countries. ([Euronews](#)).

### **c. Why do you want to become an entrepreneur?**

This question of motivation can be addressed by the trainer through a group activity or, if necessary, in smaller groups.

- Each group lists three motivations for becoming an entrepreneur (e.g. freedom, social impact, personal challenge).
- Feedback and classification of motivations (constraints/opportunities) and brief discussion within the group of learners.

There are many motivations for entrepreneurship, which can be classified into two categories: 'push' (constraints) and 'pull' (opportunities). Push motivations include situations such as unemployment, job

dissatisfaction or the need for flexibility (particularly for parents or carers). Conversely, 'pull' motivations are linked to the search for opportunities: the desire to create something new, a passion for a particular field, or the desire to have a social or environmental impact.

The OECD (above-mentioned study) reveals that entrepreneurs motivated by opportunities ('pull') have a higher business survival rate than those driven by constraints. This can be explained by stronger commitment and better preparation. For example, an entrepreneur who launches a renewable energy business out of ecological conviction will tend to be more resilient to difficulties than an entrepreneur forced into it by redundancy.

It is also important to note that entrepreneurship is not a binary choice: many entrepreneurs combine salaried employment with business creation (known as 'slashing'), or develop projects alongside their main activity. This hybridisation of career paths reflects a shift in attitudes and economic needs.

As an example, here is a list of arguments that learners may use, and which the trainer will need to discuss with the group:

- To earn a salary that matches my expertise
- To earn a salary that meets my needs
- To earn more money
- To earn a salary that matches my commitment
- To earn less money but work much less
- To manage my time as I wish
- To balance work and family/personal life
- To limit the time spent sitting at a desk
- To have time for other things
- To limit the time spent on paperwork and procedures
- To choose my projects
- To choose my clients
- To make a living from my passion
- To choose my colleagues
- To be free

#### **d. What is the role of entrepreneurs in society?**

Entrepreneurs play a major economic, social and environmental role. Economically speaking, they are drivers of job creation: in France, micro-enterprises and SMEs account for 99% of businesses and employ nearly half of the working population (INSEE, 2024). They also contribute to innovation, whether through disruptive products, services or business models.

Socially, new entrepreneurs aim to meet needs that are not covered by companies already on the market, associations or public operators. For example, social entrepreneurship (such as adapted companies or cooperatives) aims to solve societal problems while being economically viable.

Finally, on the environmental front, entrepreneurs are increasingly key players in the ecological transition. Numerous examples from the trainer's own experience (to be adapted to national working contexts) illustrate how a business can combine profitability and sustainability.

To justify the creation of a business as a response to a need expressed by society that is unmet (or partially met), the trainer can launch the 'Five Whys' activity collectively or individually. This is described below in the section dedicated to tools (Tool 1). This activity helps justify starting a business to provide a solution to an unresolved problem. Obviously, this approach is simplistic, as solving a problem cannot be the only justification for starting a business.

## 2. The values and qualities of entrepreneurs

**Objective:** Identify and work on the values, qualities and attitudes essential for entrepreneurship.

### a. Matching the values and the project

The business plan must contribute to realising the entrepreneur's vision and promoting their ideas (skills 3 and 4 of the Entrecomp reference framework). Personal values are the invisible foundation of an entrepreneurial project. They guide decisions, corporate culture and even the business model. For example, an entrepreneur for whom transparency is a core value will choose ethical partners and suppliers and communicate openly about their costs and margins. Conversely, a performance-oriented entrepreneur will prioritise efficiency and rapid growth.

A study by [Harvard Business Review](#) (2016) shows that companies whose values are aligned with those of their founders have a higher customer satisfaction rate. This can be explained by overall consistency: employees, customers and partners perceive authenticity, which builds trust.

To identify the learners' values, tools such as the wheel of values (a list of 50 to 100 values to be ranked in order of importance – this tool is described in the tool section below – tool2) or life retrospective exercises ('What moments made me proud? Why?') are useful for a group discussion. These values must then be translated into concrete actions in the project: choice of suppliers, recruitment policy, communication, etc.

### b. The qualities of an entrepreneur

The objective is to provide an in-depth understanding of the different facets of entrepreneurship and the personal qualities associated with it, focusing on several key aspects:

- ✓ **Motivation and perseverance (competence 7 of Entrecomp):** being an entrepreneur means creating something new, providing solutions to problems and seizing opportunities.
- ✓ **Spotting opportunities (competence 1 of Entrecomp):** being an entrepreneur means constantly seeking opportunities in the markets, scrutinizing the environment and detecting emerging trends.
- ✓ **Transformation into a project:** once trends have been identified, being an entrepreneur means transforming them into a concrete entrepreneurial project by testing them on the market
- ✓ **Planning and management (competence 13 of Entrecomp):** for an entrepreneurial project to succeed, the entrepreneur must learn to set up a careful organization and planning process.
- ✓ **Continuous improvement and learning through experience (competence 15):** being an entrepreneur involves constantly improving one's offering to ensure customer satisfaction. They never stop learning about their market.

The qualities of an entrepreneur can be divided into technical skills (hard skills) and behavioural skills (soft skills). While the former (management, accounting, marketing) can be learned, the latter are often innate or developed through experience.

Essential soft skills linked with entrepreneurship include in particular the following:

- ✓ **Self-confidence:** Self-confidence has a significant impact on professional achievements and successes. It is above all a state of mind based on self-esteem and belief in one's abilities. Believing in one's abilities and being able to accomplish what one sets out to do is necessary

to succeed as an entrepreneur, who therefore strengthen their self-confidence by relying on several essential pillars:

- **Self-awareness and self-efficiency (Competence 6 of Entrecomp):** The desire to explore the world / The willingness to constantly learn and change one's opinions / Acceptance of what cannot be changed / Living in alignment with one's emotions, values, needs, and aspirations / Openness to change
  - **Self-acceptance:** Being our own best friend / Take care of ourselves / think positively about ourself / Pay attention to our feelings and desires / know yourself / Be aware of our strengths and weaknesses
  - **Celebration:** Notice and appreciate our achievements / Celebrate our successes / Trigger positive emotions.
- ✓ **Resilience:** The ability to bounce back after failure. A Harvard study (2006) shows that entrepreneurs who have experienced at least one failure are more likely to succeed when they try again. The development of resilience is also linked to self-confidence (see above) and the ability to accept experimentation and risk-taking: not being afraid of failure, mistakes, criticism, judgement and rejection / Having the courage to act, to realise dreams and projects / Living in harmony with the values and desires / Remembering that fear is an inseparable part of courage, so entrepreneur need to familiarize him/herself with it / Allowing him/herself to take action rather than stopping. In the 'Tools' section (tool 3), we also provide trainers with a more detailed activity template on the theme of 'resilience' to support future apprentice entrepreneurs.
- ✓ **Creativity (competence 2 of Entrecomp):** Creativity is the ability to imagine, design or produce something new, original and relevant, to find innovative solutions to complex problems. It involves thinking outside the box, making unexpected connections and transforming ideas into concrete solutions. Creativity is not reserved for artists: it applies to all areas of life, from everyday activities to professional pursuits. You can set up this little activity to help your learners understand the concept and stimulate their creativity.

### **Simple activity to stimulate creativity in a group: 'The Crazy Frame'**

**Objective:** Encourage imagination, break routines and promote collaboration by transforming an everyday object into something unexpected.

**Materials:** A sheet of paper or whiteboard / Pens, pencils or markers / An everyday object (e.g. a chair, a cup, an umbrella)

**Procedure (10-15 min):** Choose an object: Select a simple, familiar object (e.g., a chair) / Define a crazy frame: Give the object an absurd constraint or imaginary context. For example: 'What if this chair were a vehicle for exploring Mars?' / 'What if this cup could talk, what would it say?' / Group brainstorming: Each participant proposes an idea, a drawing or a feature related to this crazy scenario. No censorship, all ideas are welcome! / Sharing and discussion: Present the most original ideas and discuss their feasibility or humour.

- **Adaptability/ Coping with ambiguity, uncertainty and risk** (competence 13 of Entrecomp): Adaptability is the ability to adjust one's behaviour, thoughts or actions in response to changes or new, unexpected or complex situations. It involves:
  - Mental flexibility: knowing how to question one's habits and certainties.
  - Resilience: see above
  - Open-mindedness: accepting and integrating new ideas or methods.

Adaptability is a key skill in a constantly changing world, whether in personal, academic or professional life.

### **Simple activity to stimulate adaptability in a group: 'The Changing Rules Game'**

**Objective:** To give participants the experience of a sudden change in rules, encouraging them to reflect on their ability to adapt and find quick solutions.

**Materials:** A simple, well-known game (e.g. 'Rock-Paper-Scissors', 'Neither Yes nor No', or a basic card game) / A timer (optional).

**Procedure (15-20 min) Start the game:** Explain the classic rules of the chosen game (e.g., 'Rock-Paper-Scissors') / **Change the rules during the game:** After a few rounds, introduce a new, unexpected rule (e.g., 'Now, paper beats rock AND scissors,' or 'You must play with your non-dominant hand') / **Observe how participants react:** some will resist, others will adapt quickly / **Discussion and reflection:** Ask participants: 'How did you feel when the rules changed?' / 'What strategies did you use to adapt?' / 'How does this experience reflect real-life situations (at school, at work, in life)?'

- **Leadership:** Leadership is a person's ability to inspire, guide and motivate a group or team towards achieving common goals. A good leader does not just give orders: they listen, encourage collaboration, make informed decisions and create an environment where everyone feels valued and involved. Leadership is based on qualities such as:
  - Vision: knowing where to go and sharing that direction.
  - Empathy: understanding the needs and motivations of others.
  - Communication: conveying ideas clearly and listening actively.
  - Trust: inspiring and gaining the trust of group members.

Leadership can be exercised in all contexts, whether at work, at school or in everyday life.

Leadership includes competence 14 of the Entrecomp framework (Working with others).

**Simple activity to stimulate leadership in a group:** 'The Blind Guide Challenge'

**Objective:** To develop trust, communication and the ability to guide others, while strengthening listening and collaboration within the group.

**Materials needed:** An open space (room, courtyard, park) / Scarves or bandanas for blindfolding (optional: simply use trust without blindfolding) / Simple obstacles (chairs, cushions, hoops) to create a course.

**Procedure (20-30 min):** Form pairs: One participant plays the role of the 'guide,' the other is the 'blind traveller' (blindfolded or with eyes closed) / **Create a course:** Arrange obstacles to form a simple path to cross / **Give instructions:** The guide must lead their partner from point A to point B using only their voice (no physical contact) - The blind traveller must listen carefully and follow instructions / **Reverse roles:** After completing the course, participants swap roles / **Discussion and reflection:** "What made the guide's task easier or more difficult?" - 'How did the blind traveller feel about their trust (or lack thereof) in their guide?' - 'What leadership qualities did you observe or use?'

**Add constraints:** Limit the number of words used by the guide or introduce background noise to make communication more difficult.

This activity illustrates the importance of clear communication, active listening and trust in leadership. It also shows that anyone can take on this role, even in uncomfortable situations.

Hard skills include financial management, market knowledge, digital tool proficiency and are developed in other learning units of this training. However, a [LinkedIn study \(2024\)](#) reveals that 92% of recruiters favour soft skills when hiring, as they are more difficult to teach.

To help learners understand these key soft skills, in addition of the activities listed above, the trainer can lead a discussion on 'the essential qualities of an entrepreneur in your opinion' and then launch a debate on the topic 'Can these qualities be learned? How can they be developed?'

### c. The attitudes of an entrepreneur

Attitudes differ from qualities in that they relate more to everyday behaviour. A good entrepreneurial attitude enables the entrepreneur to effectively embody his/her business, reflect its values, and adopt the right mindset. The aim is to enable entrepreneurs to develop a solid stance in line with their vision, thereby reinforcing the consistency between their professional identity and their company's values.

Key attitudes include:

**Proactivity:** Anticipating problems and acting without delay. For example, a proactive entrepreneur will identify market trends before their competitors.

**Managing uncertainty:** Accept that not everything can be planned. Tools such as the OODA (Observe, Orient, Decide, Act) method, used by the military, help to make quick decisions in uncertain contexts.

**Open-mindedness:** Listen to feedback, even negative feedback. Steve Jobs was fired from Apple in 1985 before returning in 1997, an experience that strengthened his ability to listen and innovate.

**Management of emotion and stress management:** Work-related stress and inappropriate behaviour as an entrepreneur have a negative impact on our health and the quality of our working relationships. They also impact our ability to perform as expected and create an environment that is unfavourable to cooperation, solution design and quality of life. Reducing the effects of stress improves quality of life and entrepreneurial skills.

A joint study by the University of Quebec at Trois-Rivières and the University of Montpellier ([2016](#)) showed that stress factors related to running a business (finances, administration, loneliness) are strong predictors of burnout and psychological distress among SME owners/managers in France - please find and cite the source.

Tool No. 4 below enables you to discuss the concept of entrepreneurial stress with learners and show that effective stress management can help improve creativity.

## 3. Launching a business project

**Objective:** Understand the entrepreneurial environment and begin transforming an idea into a project.

### a. The entrepreneurial environment

An entrepreneur's environment is a complex ecosystem comprising:

- Regulatory obligations and public authorities responsible for monitoring and enforcing them: legal context for setting up a business, tax framework, labour law, etc.
- Public, private and associative actors who support and assist entrepreneurs in discovering and understanding these regulatory obligations, and who more generally are there to facilitate the start-up process. Chambers of Commerce and Industry (CCI), public or private banks, social economy financing structures (crowdfunding platforms, microcredit organisations), support networks and structures (business incubators, entrepreneurs' clubs, third places), training centres, chartered accountants, etc. all contribute to facilitating the start-up process, provided that they are mobilised correctly. These structures offer (sometimes for a fee) training, financing (zero-interest loans, grants), mentoring and coaching.

A lack of knowledge about this environment is a frequent source of difficulties for business creators: wasted time during the start-up stages, difficulty in understanding the regulatory environment due to a lack of advice, difficulty in investing due to a lack of adequate financial advice, etc.

The role of the trainer is to help future entrepreneurs identify the key structures and functions of this environment and understand their role. This is referred to as the entrepreneurial ecosystem.

To introduce learners to the entrepreneurial ecosystem, we recommend a five-step approach:

- **Define the entrepreneurial ecosystem**

An entrepreneurial ecosystem is an environment that promotes business creation by providing resources (funding, mentoring, clubs of entrepreneurs, networks of mentors), infrastructure (incubators, co-working spaces, third places) and an appropriate regulatory framework.

Help students understand that it is an interconnected network of actors, resources and institutions that support the creation and growth of businesses.

Analogy: Compare it to a garden: Seeds = ideas/start-ups - Fertile soil = ecosystem (resources, networks) - Gardeners = mentors, investors, institutions.

Concrete examples: Silicon Valley: Mature ecosystem with venture capital, universities (Stanford), and a culture of innovation / Station F (Paris): Largest incubator in the world, with programmes for start-ups / Local ecosystem: Cite regional examples.

- **Map the players in the ecosystem**

The aim is to help learners discover the players and understand their missions. You can work with learners to build a visual diagram (whiteboard, mind map or digital tool such as Miro) to represent the players and their interactions by identifying the categories of players, their roles and the resources they can contribute, as well as concrete examples from your regional ecosystem.

Categories (non-exhaustive list): Entrepreneurs, investors, incubators/accelerators, public institutions, training centres, professional networks, service providers, media, customers/users.

Once these players have been identified, learners can be asked to name five key players they will need (e.g. an incubator, an investor, a mentor).

- ✓ **Raise awareness of challenges and opportunities**

Understanding the ecosystem must be considered in relation to the challenges that the entrepreneur will face. Here, the aim is not to address the categories of the Business Model, which will be covered in Unit 2, but rather to understand some of the challenges and identify the players in the ecosystem who can help to overcome them.

For example

Challenge 1: Access to finance - Problem: Difficulty raising funds for the initial phases.

Solutions: Bank financing (identify the difficulties new entrepreneurs face in accessing bank financing) / Bootstrapping (self-financing) / Love money (family, friends) / Competitions (e.g. innovation competitions) / Microfinance / Crowdfunding

Challenge 2: The loneliness of the entrepreneur - Problem: Isolation, mental pressure.

Solutions: Peer networks (e.g. entrepreneur clubs) / Mentoring

Challenge 3: Regulation - Problem: Administrative complexity (start-up, tax, social security).

Solutions: Simplification via information platforms such as [Guichet Entreprises](#) / Support from experts (accountants, lawyers, incubators, etc.).

## **b. From idea to project – On the way to Unit 2**

Transforming an idea into a concrete project requires a structured methodology. The first step is to validate the idea: does it meet a real need? To do this, tools such as [Lean Canvas](#) (a simplified version of the Business Model Canvas) or customer interviews are essential. Taking into account the concepts discussed above (the need that justifies the creation of the business, the entrepreneur's values, etc.)

The first step is to help learners clearly formulate their business idea by going through the following steps:

- **Clarify your idea**

What is the nature of my project? What problem does it solve?

- **Identify your mission**

What motivates me? What contribution do I make to society and the local area?

- **Define your target audience**

Who is affected by my project? What are their needs?

- ✓ **Write down your vision**

Describe what you want for your project (in one year, three years, five years)

This clarification will be continued through the business model canvas, a tool discussed in Unit 2 for structuring the entrepreneurial project based on the idea.

The second step is to help learners understand that a business project is flexible, dynamic and evolving (recall the values of adaptability and resilience discussed previously). Explain the five key steps in launching a business:

- ✓ **Initial research:** once the idea, mission, vision and target audience are more or less in place, it is time to check that they are consistent. This may involve researching data, studies and competitors and understanding the needs of the target audience.
- ✓ **Project adaptation:** based on the results, the idea is adjusted to meet market needs. Emphasise to your learners the importance of not giving up. An idea or concept is never perfect.
- ✓ **Testing and validation:** encourage learners to test the idea through prototypes, surveys, tests, beta versions, comments and reactions. The first test should be considered a draft.
- ✓ **Collection, feedback:** Aspiring entrepreneurs must learn to take a step back to adapt their product/service to the market based on the test results.
- ✓ **Launch and ongoing monitoring**

Unit 2 will address the implementation of the project through the definition of the business model.

## Practical action points / Can I have some tips?

These key concepts require addressing issues of psychology and personal attitudes that can sometimes seem intrusive and for which the trainer may feel out of place. We believe that the right approach for trainers in this unit is based on:

- a good grasp of the few theoretical concepts and definitions to be discussed with learners: prior knowledge of preconceived ideas, key definitions of psychological factors and soft skills covered, etc. In this regard, we strongly recommend supplementing the training content with the reading of the works suggested in the bibliography section;
- acting as a mediator in the activities carried out: these are mainly based on the learners' personal reflection and interactions with each other within a small group of learners. The trainer acts as a facilitator of reflection and interaction, and as little as possible as a 'know-it-all' who offers diagnoses about the learners.

## Evaluating success /Let's evaluate what I learnt!

### Section 1:

#### 1. 'Entrepreneurs are loners who succeed on their own.' This preconception is:

- A) True: an entrepreneur must control everything to avoid mistakes and retain the credit for success.
- B) Partially true, because only freelance entrepreneurs work without a team.
- C) False: entrepreneurial success often relies on an ecosystem (team, mentors, partners, customers) and the ability to delegate and collaborate.

Correct answer: C) False: success often depends on an ecosystem and collaboration.

#### 2. 'To start a business, you need to have significant capital from the outset.' This statement is:

- A) True: without substantial equity, it is impossible to launch a viable business.
- B) False: many projects start with limited resources, relying on creativity, bootstrapping or external financing (loans, grants, crowdfunding).
- C) Partially true, because only technology sectors require heavy investment.

Correct answer: B) False: many projects start with limited resources.

#### 3. 'Entrepreneurs are reckless risk-takers.' This preconception is:

- A) False: entrepreneurs generally assess risks and opportunities and seek to control them through rigorous preparation and progressive testing.
- B) True: entrepreneurship involves betting everything on an idea without assessing the consequences.
- C) Partially true, because only experienced entrepreneurs know how to manage risks.

Correct answer: A) False: entrepreneurs assess and control risks.

#### 4. 'You have to be young to be an entrepreneur.' This statement is:

- A) True: young people have more energy and innovative ideas, which are essential for success.
- B) False: entrepreneurship has no age limit. Experience, maturity and networking can be major assets for older entrepreneurs.
- C) Partially true, because older people find it more difficult to adapt to new technologies.

Correct answer: B) False: entrepreneurship has no age limit.

## **Section 2:**

### **Multiple-choice quiz on the qualities of an entrepreneur:**

**1. Which quality is essential for an entrepreneur to overcome failures and persevere in their project?**

- A) Resilience, because it allows them to bounce back after failures and maintain their motivation despite obstacles.
- B) Blind optimism, which consists of believing that everything will work out in the end without analysing the causes of failure.
- C) The ability to externalise responsibilities, to avoid bearing the burden of difficulties alone.

**Correct answer:** A) Resilience

**2. Why is creativity an important quality for an entrepreneur?**

- A) To stand out from competitors by offering identical products or services, but with better marketing.
- B) To innovate and find original solutions to problems, by rethinking processes or creating value where it did not exist before.
- C) To avoid relying on data or market analysis, favouring pure intuition instead.

**Correct answer:** B) To innovate and find original solutions to problems

**3. What does calculate risk-taking mean for an entrepreneur?**

- A) Making decisions quickly, without prior analysis, in order to seize every opportunity.
- B) Avoiding all risk by replicating existing models, even if they are no longer suited to the market.
- C) Assessing opportunities and risks before making a decision, based on data and strategic vision.

**Correct answer:** C) Assessing opportunities and risks before making a decision

**4. Why is the ability to adapt crucial for an entrepreneur?**

- A) To blindly follow current trends, without worrying about consistency with their long-term vision.
- B) To respond to changes in the market and customer needs, while adjusting their strategy without losing sight of their objectives.
- C) To avoid making difficult decisions, waiting for circumstances to change favourably.

**Correct answer:** B) To respond to changes in the market and customer needs, while adjusting their strategy without losing sight of their objectives

### Section 3:

#### 1. Which player in the entrepreneurial ecosystem plays a key role in supporting start-ups in the seed phase by providing a structured framework and shared resources?

- A) Incubators, which provide accommodation, mentoring and access to a network of experts to help entrepreneurs validate their business model and accelerate their development.
- B) Traditional banks, which offer preferential interest rate loans without collateral requirements for innovative projects.
- C) Large industrial groups, which systematically acquire pre-launch start-ups to integrate their innovations.

**Correct answer:** A) Incubators

#### 2. How do entrepreneurial networks (such as business clubs or professional associations) contribute to the entrepreneurial ecosystem?

- A) By imposing strict standards that limit creativity and innovation in order to standardise practices.
- B) By facilitating the exchange of experiences, partnerships and access to business or financing opportunities, while offering moral support and constructive feedback.
- C) By replacing public institutions in the financing of projects, without any compensation for entrepreneurs.

**Correct answer:** B) By facilitating the exchange of experiences, partnerships and access to commercial or financing opportunities

#### 3. Why are local ecosystems (such as business incubators or third places) important for entrepreneurs?

- A) They allow entrepreneurs to work in isolation, without interacting with other local economic actors.
- B) They create an environment conducive to collaboration, cost and resource sharing, and promote synergies between entrepreneurs, institutions and economic actors in the same territory.
- C) They replace incubators and accelerators by offering direct funding without any quid pro quo.

**Correct answer:** B) They create an environment conducive to collaboration, cost and resource sharing, and promote the emergence of local synergies.

#### 4. What is the first recommended step in turning an idea into a concrete entrepreneurial project?

- A) Validate the feasibility of the idea by conducting market research and testing the interest of potential customers.
- B) Invest immediately in mass production to benefit from economies of scale.
- C) File a patent to protect the idea before taking any other action, even without proof of demand.

**Correct answer:** A) Validate the feasibility of the idea by conducting market research and testing the interest of potential customers.

## 5. What common pitfall should entrepreneurs avoid when moving from idea to project?

- A) Rushing into production without validating demand or the business model, for fear of having the idea 'stolen'.
- B) Waiting too long to launch the project, trying to plan for everything and eliminate all risks.
- C) Completely ignoring feedback from early customers in order to remain faithful to the initial vision.

**Correct answer:** A) Rushing into production without validating demand or the business model.

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## REPORTS, STUDIES, WEBSITES AND PODCASTS

[Global Entrepreneurship Monitor \(GEM\) Report \(2024\)](#)

[A podcast of Stanford University \(2021\): Why Entrepreneurs startup fails and How to Avoid It?](#)

[Harvard Business Review. \(2021\). The secret to building resilience](#)

[Harvard Business School, National Bureau of Economic Research \(NBER\) \(2008\) Performance persistence in entrepreneurship.](#)

[Harvard Business School, National Bureau of Economic Research \(NBER\) \(2006\) Skill vs. Luck in Entrepreneurship and Venture Capital: Evidence from Serial Entrepreneurs](#)

[OECD, SME and Entrepreneurship Outlook 2023](#)

[FFEM : a E+ project to support entrepreneurship by women](#)

[https://single-market-economy.ec.europa.eu/sectors/proximity-and-social-economy/social-economy-eu/social-enterprises\\_en](https://single-market-economy.ec.europa.eu/sectors/proximity-and-social-economy/social-economy-eu/social-enterprises_en)

## Tool n°1: Responding to a need using the method of “The 5 Whys” – Root cause analysis method

### AIM

Identify the root cause of a problem by repeatedly asking ‘Why?’ until you reach the fundamental source of the problem and can identify the solution. This method helps avoid superficial solutions and target sustainable corrective actions. It helps identify the solution at the root of the problem. The objective is then to determine a business idea based on the answer to the final “why”.

### LEARNING OUTCOMES

**At the end of the exercise, participants will be able to:**

- Understand the importance of digging deeper into a problem to find its root cause.
- Apply the 5 Whys method to analyse a specific problem.
- Distinguish between immediate causes and root causes.
- Propose appropriate and effective solutions based on a business creation.

### DURATION

15 to 30 minutes for a simple case. Up to 1 hour for a complex problem or in a group.

### MATERIALS

- A whiteboard, flipchart or digital medium (e.g. Google Jamboard, Miro).
- Post-it notes or mind mapping software.
- A pen and paper to write down answers.
- A concrete example of a problem to analyse (real or fictional).

### METHODOLOGY

The method is based on an iterative approach:

Identify the problem clearly and precisely.

Ask the question ‘Why?’ for each answer obtained.

Repeat the process until you reach the root cause (usually in 5 steps, but sometimes more or less).

Validate the root cause and propose targeted solutions.

### PROCESS

#### 1. Define the problem

The trainer is required to formulate a simple problem that is likely to stimulate reflection and creativity in all learners. Example: ‘The project was delivered late’

#### 2. Ask the first ‘Why?’

‘Why was the project delivered late?’

Possible answer: ‘Because the testing phase took longer than expected.’

#### 3. Ask the second ‘Why?’

'Why did the testing phase take longer?'

Possible answer: 'Because critical bugs were discovered late in the process.'

#### **4. Ask the third 'Why?'**

'Why weren't these bugs detected earlier?'

Possible answer: 'Because unit tests were not performed systematically.'

#### **5. Ask the fourth 'Why?'**

'Why were unit tests not performed?'

Possible answer: 'Because the team had not been trained in this practice.'

#### **6. Ask the fifth 'Why?' (root cause): 'Why was the team not trained?'**

Possible answer: 'Because there was no budget allocated for continuing education.'

**7. Propose solutions:** The principle of the discussion is to propose an idea that could lead to the creation of a business to address the problem. If such a business already exists, consider the obstacles preventing the problem from being solved (resources? Time? Organisation?).

### **TIPS FOR TRAINERS**

Encourage participation: Involve all team members to get a variety of perspectives.

Avoid judgements: Focus on the facts, not the people.

Stay concrete: Use real examples to anchor learning.

Adapt the number of 'Whys': Sometimes 3 or 7 questions are needed to reach the root cause.

Visualise the process: Use a diagram or cause tree to clarify the links between answers.

### **ASSESSMENT**

Self-assessment: Ask participants to apply the method to a personal case and share their conclusions.

Quiz or case study: Present a fictional problem and assess the ability to identify the root cause.

Group feedback: Discuss the proposed solutions and their relevance.

### **REFERENCES**

[Toyota Production System: The 5 Whys method was popularised by Toyota in the 1970s to improve quality and solve production problems.](#)

Book: The Toyota Way: 14 Management Principles from the World's Greatest Manufacture (Jeffrey Liker, 2004).

## Tool n°2: Identifying my 5 core values – An exercise in introspection and personal alignment

### AIM

To help each participant clarify their core values by selecting them from a predefined list, in order to better understand what guides their choices, motivations and priorities in their personal and professional lives.

### LEARNING OUTCOMES

**At the end of the exercise, participants will be able to:**

- Identify their 5 core values from a varied list.
- Understand the impact of these values on their decisions and well-being.
- Articulate how these values influence their daily lives, relationships and work.
- Use this knowledge to align their actions and goals with their core values.

### DURATION

20 to 30 minutes (including reflection, selection and optional sharing).

### MATERIALS

- A printed or digital list of values (e.g., freedom, family, creativity, security, integrity, success, health, learning, recognition, balance, etc.).
- A pen and a sheet of paper (or a digital device for notetaking).
- A whiteboard or flipchart (for group sharing, if applicable).
- A timer (to structure the reflection time).

### METHODOLOGY

This activity is based on an introspective and structured approach:

1. Presentation: Explanation of the importance of values and their impact on life.
2. Selection: Each participant chooses their top 5 values from a proposed list.
3. Reflection: Analysis of the reasons why these values are priorities.
4. Sharing (optional): Group discussion to enrich collective understanding.

### PROCESS

#### 1-Introduction (5 min)

- Explain what a core value is: a principle or quality that guides our actions and decisions.
- Give examples: " If you had to choose between security and freedom, which would be more important to you? Why?"

#### 2-Distribution of the list of values (5 mins)

- Give each participant a list of 30 to 50 values (e.g. honesty, ambition, stability, adventure, spirituality, etc.).
- Ask them to read the list carefully and highlight the values that resonate most with them.

#### 3-Selecting the 5 values (10 mins)

- First step: Ask participants to select 10 values that seem essential.

- Second step: Reduce this list to 5 fundamental values by eliminating those that seem less important.
- Tip: 'Imagine that you can only keep 5. Which ones would you choose?'

#### 4. Individual reflection (5 mins)

- For each value selected, ask participants to note down:
  - Why is this value important to you?
  - How does it manifest itself in your daily life?
  - A concrete example of how this value has influenced a decision.

#### 5. Group sharing (optional, 5-10 mins)

- Invite participants to share one or two of their values and their meaning.
- Encourage discussion about the similarities and differences between participants' values

### TIPS FOR TRAINERS

Create a climate of trust: Reassure participants that there are no 'right' or 'wrong' values.

Avoid judgements: Emphasise the personal and subjective nature of the exercise.

Adapt the list of values: Provide a varied list to cover different aspects (professional, personal, social).

Encourage honesty: Remind participants that this exercise is primarily for themselves, not for others.

### ASSESSMENT

#### Self-assessment:

Ask participants to write a sentence summarising how their five values influence their lives.

Suggest that they review their list in six months to assess whether their priorities have changed.

#### Group feedback:

Discuss the challenges encountered during the selection process (e.g., difficulty choosing between two values).

Identify concrete actions to better live according to one's values (e.g., 'How can I incorporate more creativity into my work?').

### REFERENCES

Here is a non-exhaustive list to inspire participants:

- Freedom – Family – Creativity – Security – Integrity
- Success – Health – Learning – Recognition – Balance
- Adventure – Stability – Spirituality – Autonomy – Collaboration
- Respect – Love – Ambition – Simplicity – Innovation

A lot of "list of values" are available on the web. Example : [https://qualitycharters.org/wp-content/uploads/2016/10/Hiring-For-Fit\\_Values-List.pdf](https://qualitycharters.org/wp-content/uploads/2016/10/Hiring-For-Fit_Values-List.pdf)

## Tool n°3: Bouncing Back After Failure: Entrepreneurial Resilience Workshop

### AIM

- Understand the concept of resilience and its importance in entrepreneurship.
- Identify psychological and practical mechanisms for overcoming failure.
- Develop personal strategies for turning obstacles into opportunities.
- Create an individual action plan to strengthen your resilience

### LEARNING OUTCOMES

**At the end of the exercise, participants will be able to:**

- Define resilience and its role in entrepreneurial success.
- Analyse a past or hypothetical failure to learn from it.
- Apply concrete tools (e.g., 5 Whys method, logbook) to manage stress and setbacks.
- Develop a personalised recovery plan.

### DURATION

120 minutes.

### MATERIALS

Before developing the material, the trainer must first identify examples of 'resilient' entrepreneurs to illustrate the concept (e.g. Steve Jobs, Thomas Edison, Walt Disney, etc.). See references below.

- Visual aid: PowerPoint/Keynote presentation with examples of resilient entrepreneurs
- Activity sheets: List of questions for self-reflection, failure analysis grid.
- Post-it notes and whiteboard (or digital tool such as Miro/Mural) for collaborative exercises.

### METHODOLOGY

- Participatory approach: Alternating between theoretical input, individual exercises and group discussions.
- Active learning: Use of real-life cases, role-playing and experience sharing.
- Emotional anchoring: Work on limiting beliefs and emotion management:

### PROCESS

#### 1. Introduction (20 mins)

- Icebreaker: 'Name a failure that taught you something' (round table discussion).
- Theoretical input: Definition of resilience (ability to bounce back after failure or crisis). Key figures: 90% of start-ups fail, but entrepreneurs who bounce back are 2 to 3 times more likely to succeed ([source: Harvard/Stanford studies](#)). Example: J.K. Rowling (rejected 12 times before Harry Potter).
- 3 pillars of resilience: Acceptance, learning, action.

#### 2. Exercise 1: 'Analysing failure' (30 mins)

- Instruction: 'Think of a personal or professional failure (real or fictional). Use the 5 Whys method to identify the root cause.' Cf. Tool 1.
- Sharing in small groups: Each participant presents their root cause and the lessons learned.

### 3. Exercise 2: 'The resilience journal' (20 mins)

- Instruction: 'Write a letter to yourself in 6 months' time, describing:
- Your current fears about entrepreneurship.
- Your resources (skills, network, values).
- An action plan to overcome a future obstacle.'
- Variation: Use a rebound plan template (e.g., 'If X happens, I will do Y').

### 4. Case study (20 mins)

- Practical case: Analyse a company's rebound.
- Guided questions:
- What were the triggers for the failure?
- What actions enabled the rebound?
- What lessons can you learn for your project?

### 5. Closing: 'My resilience plan' (30 mins)

- Group summary: 'What are the three strategies you would use to bounce back?'
- Individual commitment: Each participant shares a concrete action they will implement within 7 days (e.g., 'I will interview 3 resilient entrepreneurs').
- Resources: Hand out a memo sheet with: The steps to resilience / A list of books/podcasts / Useful contacts (entrepreneur networks, incubators, mentoring...).

## TIPS FOR TRAINERS

- Create a supportive environment: Remind participants that there is no such thing as 'bad' failure, only learning opportunities.
- Encourage honesty: Normalise vulnerability ('Everyone fails, even successful entrepreneurs').
- Adapt examples: Use local or sector-specific cases to make the workshop more concrete.
- Offer follow-up: Invite participants to share their progress in a dedicated group (e.g., Slack, WhatsApp).

## ASSESSMENT

- Self-assessment: 'On a scale of 1 to 10, how equipped do you feel to bounce back after a failure?' (before/after the workshop).
- Group feedback: 'What is the most memorable lesson for you?' / 'Which tool will you prioritise using?'

## REFERENCES

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<https://www.youtube.com/watch?v=UF8uR6Z6KLc>

## Tool n°4: Stress Test: 5 Steps to Transform Stress into Creative Energy

### AIM

To help future entrepreneurs:

- Identify the sources of stress specific to entrepreneurship (uncertainty, financial pressure, loneliness).
- Understand the physiological and psychological mechanisms of stress.
- Experiment with concrete techniques to reduce daily stress and prevent burnout.
- Create a personal stress management plan tailored to their personality and project.

### LEARNING OUTCOMES

At the end of the exercise, participants will be able to:

- Recognise the physical and emotional signs of stress (e.g. muscle tension, rumination).
- Apply three techniques for managing stress (breathing, grounding, prioritisation).
- Develop an anti-stress routine that fits into their entrepreneurial schedule.
- Use tools to defuse stress crises (e.g., thought journal, Eisenhower matrix).

### DURATION

120 minutes.

### MATERIALS

- Visual aids: PowerPoint/Keynote presentation with diagrams on stress (Yerkes-Dodson curve, physical/mental symptoms).
- Practical sheets:
  - List of breathing techniques (cardiac coherence, 4-7-8).
  - [Eisenhower Matrix](#) (urgent/important) printed or digital.
  - Logbook (template for noting stress triggers and solutions tested).
- Creative materials: Post-it notes, felt-tip pens, whiteboard (or digital tool such as Miro).
- Sensory objects (optional): Stress balls, essential oils (lavender), relaxing music.

### METHODOLOGY

- Experiential approach: Alternating between theory, practical exercises and experience sharing.
- Active learning:
  - Self-assessment (evaluation of stress levels).
  - Experimentation with techniques in real time.
  - Personalised action plan.

### PROCESS

1. Introduction (20 mins): 'Stress: enemy or ally?'

- Icebreaker: 'What is your biggest stress as a future entrepreneur?' (round table discussion).
- Theoretical input:
  - Definition of stress: Normal bodily reaction (cortisol, adrenaline) vs. chronic stress (burnout).
  - [Yerkes-Dodson curve](#): Link between stress and performance (optimal zone).
  - Sources of stress specific to entrepreneurs: Financial uncertainty, pressure to perform, isolation, work-life balance.

2. Self-assessment (15 mins): 'What is my stress level?'

- Individual exercise: Note down your 3 main stress triggers (e.g. fear of failure, work overload).
- Share in pairs: 'What are your physical/emotional signs of stress?' (e.g. headaches, irritability).

3. Practical workshop (45 mins): '5 Anti-Stress Techniques to Try' - Instruction: 'Try out two techniques and note down the one that suits you best.'

**Present and try out live:** 4-7-8 breathing

Breathe in for 4 seconds, hold for 7 seconds, breathe out for 8 seconds (repeat 3 times).

**Cardiac coherence**

Breathe in for 5 seconds, breathe out for 5 seconds.

**Sensory anchoring**

'5-4-3-2-1': 5 things you can see, 4 things you can touch, 3 things you can hear, 2 things you can smell, 1 thing you can taste.

**Eisenhower Matrix**

Classify tasks as urgent/important to prioritise.

Thought journal

Write down your fears and rephrase them into concrete actions.

4. Case study (20 min): 'How these entrepreneurs manage their stress'

- Concrete examples (to be chosen)
  - Arianna Huffington (Thrive Global): Sleep routine and digital disconnection.
  - [https://www.ted.com/talks/kelly\\_mcgonigal\\_how\\_to\\_make\\_stress\\_your\\_friend](https://www.ted.com/talks/kelly_mcgonigal_how_to_make_stress_your_friend)
  - A local entrepreneur (guest or video): Testimonial about their strategies.
- Discussion

5. Action plan (20 mins): 'My Anti-Stress Toolbox'

- Individual exercise:

Create a 7-day plan with: 1 breathing technique per day / 1 moment of disconnection (e.g. no emails after 8 p.m.) / 1 enjoyable activity (sport, reading).

## TIPS FOR TRAINERS

- Create a climate of trust: Normalise stress ('Everyone suffers from it, even successful entrepreneurs').
- Adapt examples: Use cases of young entrepreneurs (e.g. local start-ups) to make it concrete.
- Encourage honesty: Remind participants that there is no 'right' or 'wrong' way to react to stress.
- Offer alternatives:
  - for introverts: Individual techniques (journaling, walking).
  - for extroverts: Group exercises (brainstorming solutions).
  - Plan for follow-up: Offer a discussion group or dedicated channel (Slack, WhatsApp) to share progress.

## ASSESSMENT

1. Self-assessment: 'On a scale of 1 to 10, how equipped do you feel to manage your stress?' (before/after the workshop).
2. Group feedback:

'Which technique will you try this week?'

'What is your main challenge in applying these tools?'

## REFERENCES

List of apps (Headspace, Petit Bambou, Forest).

Books:

Alex Korb, *The Upward Spiral*, 2015

Matthew Walker, *Why We Sleep: Unlocking the Power of Sleep and Dreams*, 2017



**ESF**

**ENTREPRENEURSHIP  
WITHOUT BORDERS**

Total Time:

**8** hours

## Learning Unit 2

# The Entrepreneurial Journey: From concept to business plan

# Learning Unit 2: The Entrepreneurial Journey: From concept to business plan

## Definition/What is about?

This learning unit focuses on the entrepreneurial journey. It provides trainers with the necessary knowledge and tools to support entrepreneurship students to successfully move from initial idea to the formulation of the business plan. It introduces several tools which should be introduced to learners to help them to validate and structure a business idea: The Lean Startup, Business Canvas Model, and Value Proposition Canvas.

Strategic planning, in particular, the OKR framework for defining business objectives and key results, will be introduced. Building professional partnerships and networks will also be explored. Finally, there will be a focus on tools for business performance monitoring.

Following this unit, trainers will be equipped to provide learners with relevant models, frameworks and tools which can lead to a higher possibility of business success, from the start.

There will also be a focus at the end of each learning activity where trainers reflect on the teaching methods and activities used with them, to consider what worked well and what they might adapt or improve when delivering entrepreneurship education training with their learners.

## Learning Objective / What can I learn?

By the end of this unit, participants will be able to:

- Guide learners in the validating and refining of their business project.
- Guide learners to use tools for the design and development of a business model and business plan.
- Model planning strategically, building relationships and networks, and the implementation of KPI for business performance monitoring

## Introduction/What is included?

- The Lean Startup methodology for the validation of a business
- Business Model Canvas for structuring a business idea
- Value Proposition Model to explore customer needs more deeply and align solutions more precisely with those needs.
- Writing a formal business plan
- Introduction to development strategy using the OKR framework
- Identification and negotiation of strategic partnerships and networks
- KPI Monitoring of business performance using Dashboard.

## Contextualization / Why do I need to invest my time on this?

Helping future entrepreneurs understand the economic and societal environment of business creation and become aware of the skills needed to manage a business are essential steps in properly understanding the process of creation and, in some cases, abandoning a project before it fails.

The role of the trainer in this area is mainly to support learners' personal reflection and self-assessment of their skills. Above all, it is a question of helping them to 'reveal' their creative abilities, to understand the social, economic and regulatory environment in which entrepreneurs operate and how to interact with this environment.

## Theoretical approach

### Validating a Business Idea

**Main idea:** Don't guess what customers want – ask them what they want! Early and frequent communication with potential customers is key to success!

Every entrepreneurial journey begins with an idea, but how do you know if it has the potential to become a valid business? The most relevant reading for activity 1 (validating a business idea) is the book written by Eric Mies: *The Lean Startup: How Today's Entrepreneurs Use Continuous Innovation to Create Radically Successful Businesses*. **The main idea is that instead of relying on intuition regarding what customers want, entrepreneurs should communicate with potential customers from the start to discover what they actually want to avoid wasting time and finances in the initial stages of creating a business.**

The Lean Startup emphasises the importance of speaking to potential customers early and often. It emphasises customer feedback over intuition and flexibility over planning and ensures a higher chance of recovery from failures without the need for outside funding, elaborate business plans or the perfect product. It focuses on learning from customers, testing assumptions, and iterating or pivoting quickly based on feedback and data. It involves continually testing iterative and incremental versions of the product, almost from day one.

Integral to the Lean Startup methodology is its focus on customer feedback during the development of the product or services, to ensure that the product or service being developed is something customers actually want. This involves assessing the specific demands of consumers and deciding how the demand can be met. Customer feedback is used to tailor the product or service to meet the specific needs of the customer.

To obtain customer feedback, entrepreneurs should implement **Customer Discovery**, a key part of the Lean Startup methodology which involves talking to potential consumers early and often. Customer discovery is the process of validating the assumptions and hypotheses about the customer's problems, needs and desires through direct interactions and feedback.

Another method for obtaining customer feedback is **Market Research**, the process of gathering and analysing data about size, trends, needs, and preferences of a specific market segment.

In his book, and on his website, Eric Ries, defines some core lean startup principles:

### **Minimal Viable Produce (MVP):**

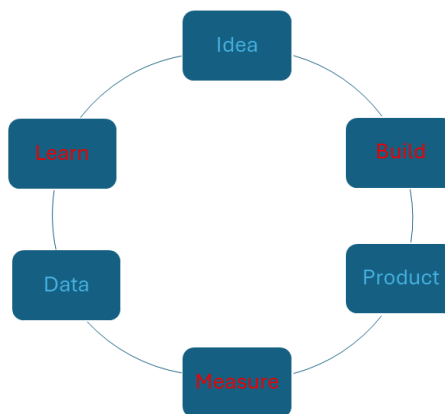
A minimal viable product (MVP) has just enough core features to deploy the product, and no more. It is a product version which is just about usable by early customers who can then be asked for feedback to inform future development. A focus on MVP helps entrepreneurs avoid lengthy and costly unnecessary work. It provides entrepreneurs with insight as to whether their business idea is viable and profitable by

testing the assumptions behind a potential product or business idea in the very early stages of development. Involving early adopters (potential customers who test the product and provide feedback to aid development) avoids building products that customers do not want and seeks to maximize information about the customer with the least money spent.

This main principle of the Lean Startup approach is centred on validation of the hypotheses underlying the product or business idea, asking customers if they want the product, if the product meets their needs and pivoting if they receive a negative response. In this way, a MVP helps provide entrepreneurs with insight as to whether there is market demand for their idea before investing heavily in the idea.

### **Build-Measure-Learn:**

One of the core components of the Lean Startup framework is the Build-Measure-Learn feedback loop:



**Source:** Editable image created based on image from: [Lean Startup Principles: Vanity Metrics and Actionable Metrics | Effective Software Design](#)

This loop begins with a definition of what the problem is that needs solving and building a minimum viable product that can be tested and measured as soon as possible using actionable metrics (See below). Entrepreneurs can learn from the data acquired and continue the cycle.

### **Actionable metrics vs vanity metrics:**

Actionable metrics are central to the Lean Startup framework as they help entrepreneurs make decisions. Vanity metrics in comparison don't offer clear guidance. Vanity metrics, for example, the number of unique viewers to a company website –lack context, have unclear intent and do not guide action or learning. If you consider the number of unique visitors to a company website, what exactly does that show? Can the entrepreneur remember exactly what actions he/she took in the past to drive those hits? And does it tell the entrepreneur what to do next? In most cases, it's not very helpful.

Actionable metrics on the other hand, can lead to informed business decisions and subsequent actions. Split Testing is an example of an actionable metric.

### **Split Testing:**

Split testing, also known as A/B Testing, aligns with the Lean Startup framework and is used to discover which features of a product or service are received better than others by users. In the 'Build' phase, it

involves creating two different versions of the product, A and B, based on a hypothesis and showing version A to one group of users and version B to the other.

In the context of the 'Measure' stage, combining split testing with measurable metrics can obtain concrete data that provides insight into customer behaviour and preferences. Data is obtained and analysed to discover which version achieves a predetermined goal more effectively. It can be used to decide which features to add and which to discard. Split testing should be implemented at critical stages of development as well as in the early stages

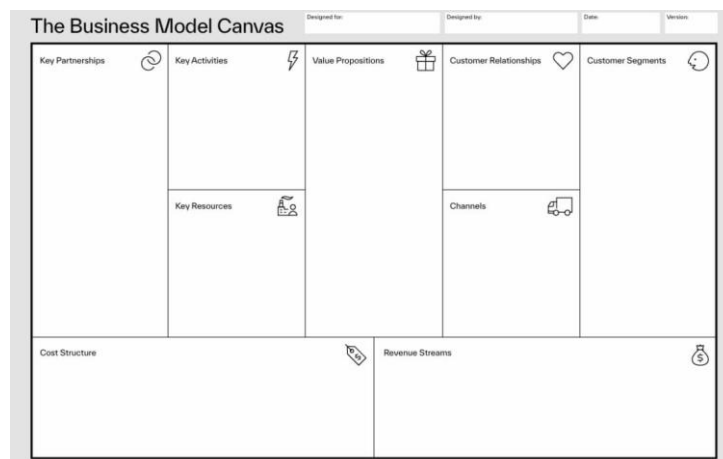
## Structuring a Business Idea

**Main idea:** The Business Model Canvas (BMC) provides a visual framework to help entrepreneurs structure their business idea. Use it to create a clear vision of your business idea in just one page!

You've validated your business idea, what's next? Activity 2 explores The Business Model Canvas (BMC), a framework which helps determine how a business creates, delivers and captures value. It is a visual representation of the important elements to consider when structuring a business idea. It was co-created by Alexander Osterwalder and Yves Pigneur in 2005 and was considered revolutionary at the time. Since then, it has led to the creation of other business canvases, such as the Lean Startup mentioned above.

Business Model Generation: A Handbook for Visionaries, Game Changers and Challengers by Osterwalder and Pigneur teaches you how to understand, design and differentiate your business ideas using the BMC.

[Business Model Canvas – Download the Official Template](#) Download the official BMC template and watch the video for a clear overview of BMC.



**Editable version (for translating) available here:** [Business-Model-Canvas.pptx](#)

**Customer segment** - Who are we serving? / Who is our product for?

**Value propositions** – Why would they use our service/ buy from us?

**Channels** - How do we reach customers and sell to them/ serve them?

**Customer relationships** - How do we interact with them?

**Revenue streams** - How does money come in?

**Key resources** – What do we need to operate?

**Key activities** – What must we do to deliver value?

**Key partnerships** – Who can we collaborate with to enhance success?

**Cost structure** – What are the major costs?

## **Value Proposition**

**Main idea:** Use the Value Proposition Canvas as a complement to the BMC to explore customer needs more deeply and align solutions more precisely with those needs!

The Value Proposition Canvas is a strategic tool designed to help businesses align their services or product with customer needs and values, thus ensuring a better fit in the market. It was designed by Alexander Osterwalder and team to complement the Business Canvas Model and focuses on two main components: the Customer Profile and Value Map.

**Customer Profile:** Jobs, Pains, Gains

**Products & Services:** Pain Relievers, Gain Creators

See Osterwalder, A & Pigneur, Y, 2014. *Value Proposition Design: How to Create Products and Services Customers* to learn more about activity 3, which is focused on the Value Proposition Canvas, a hands-on framework that helps users precisely define customer profiles, visualise the value created and achieve product market fit.

*Types of Jobs, Pains & Gains:*

- Jobs: Functional, Social, Emotional, Supporting.
- Pains: obstacles, risks, negative emotions,
- Gains: what customers expect, delight, qualities & positive outcomes.

*How to Fill It In / Process*

Start with the customer side, then move to the value proposition side. Ensure pain relievers & gain creators line up to the customer pains & gains.

**JOBS:** What is the customer trying to get done?

**PAINS:** What frustrates or blocks them?

**GAINS:** What outcomes or benefits would delight them? Set a time limit for this task to be done.

**Prioritise:** Which jobs/ pains/ gains are the most important?

**PRODUCTS/SERVICES:** What you offer.

**PAIN RELIEVERS:** How you reduce customer frustrations.

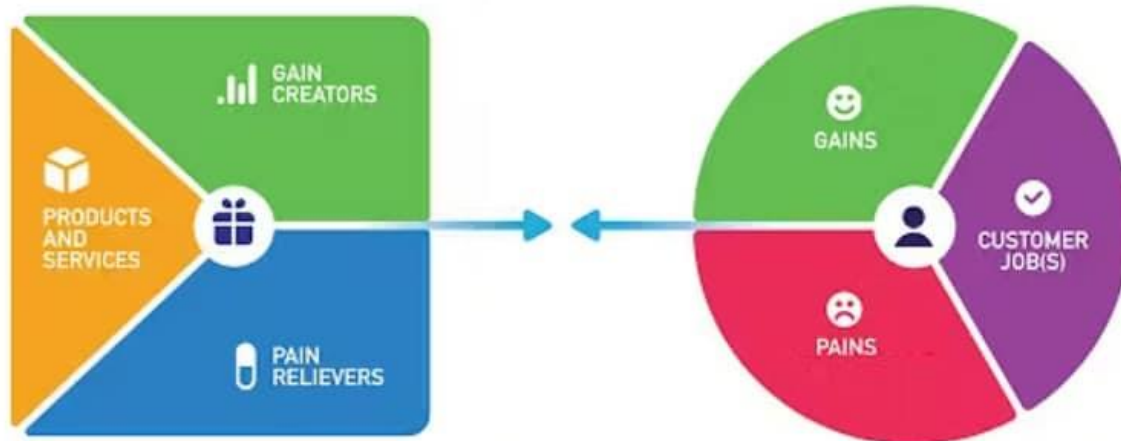
**GAIN CREATORS:** How you create positive outcomes. Learners should draw arrows to show

*Examples*

Use real examples (Adidas × Parley; Tesla; Apple Pay; Airbnb, etc.) to illustrate strong fits and show variety.

*When to Use the Canvas*

Scenarios: developing new offerings; entering new markets or segments; refining marketing strategy; checking product/market fit.



Source: [Value proposition canvas: comprehensive guide with examples](#)

Editable version for translating: [edit.org/edit/all/2qturz74gusk4kk8](#)

## Business Plan

**Main idea:** A business plan should consist of specific content and should be structured appropriately to include all the necessary information potential funders need.

After validating and structuring a business idea and ensuring its value, you are ready to write the business plan. There are different paid tools and software available for this, but Activity 4 focuses on the information a business plan should contain and how this information should be structured in general.

What is the purpose of a business plan? To discover if a business idea makes sense; acts as a map for the business; marketing tool to obtain funding.

Structure of a business plan:

**Executive Summary:** The overall view of a business and its potential. A very important part of the plan. The essence of the plan should be presented in a few short sentences at the start of the plan, to ensure the business objectives and the methods for achieving them are made clear to the reader.

**Background and description of the Business:** Set out the rationale of the business: a clear, unambiguous statement of what the business will make or sell and why this is appropriate at this time.

**Management and Organisational Structure:** Detail how your company will be organised and managed. Link people in the business to objectives set out in the plan. Will it initially be organised and run by one-person, sole trader (you)? If so, state this and provide a summary of your relevant experience, thus establishing your suitability for the business. If a larger company with a management team is planned, provide greater details of the organisation structure, including information about professional advisors or technical experts who will advise you when facing weaknesses and provide on-going advice and assistance.

**Market Research and the Marketing Plan:** Is there market demand for the product/service? After engaging in market research/ customer discovery, entrepreneurs should now be ready to answer the following questions?

1/ Demand: Why is the product/service needed and to what extent? Include evidence of the need and whether the product /service is a repeat item/service to be bought/ used over and over again. Whether the product/service is sustainable or a short-term trend should also be mentioned.

2/ Target market: What is the intended market? The larger the market the better. Is it a growing market?

3/ Competition: Who is the competition?

**Product Range:** What product range will you introduce? What's the unique selling point of your business?

**Pricing:** What will you price your product/service at? Consider pricing carefully as this impacts the way in which your product/ service is perceived (its image).

**Channels of Distribution:** Which geographic area will the product or service be marketed? Is it better to sell it yourself directly or through retail outlets or wholesalers? Is there a unique distribution system you can implement?

**Promoting the product/service:** How will the product/ service be promoted? The promotion of a business is split between: 1/ Advertising: Provide an outline of the places you will promote your business? (TV or radio ads, directories, newspapers, social media sites, etc). The advertising message needs to be carefully planned and consistently repeated for optimum impact; 2/Personal Selling: This type of strategy is effective for products/services which need explaining for potential customers to fully understand; 3/ Sales Promotion: Link promotion to your cash flow. Provide mention of any schemes that will be implemented, such as free samples, introductory offers, competitions.

**Sales Management:** Who will sell the product/service and what qualifications for this do they have? What selling methods will be employed? (for example, cold calling, following up leads from advertising campaigns, etc). Provide details of sales volumes and activity targets. Define the length of the sale process, from the customer becoming aware of the product/service, to making the decision to buy, paying and receiving it? How will customer complaints be handled? Will the product be made by the company or will it be bought ready to sell?

**Sales Forecasts:** A sales forecast needs to be prepared on which monthly cash flows and budgets can be based. Use market research to provide as clear a picture as possible. One of the most crucial factors to business success or failure is the realism of the assumptions behind the sales forecasts.

**The Operations Plan:** How will the product or services' quality be guaranteed? Operations is the general name given to all the activities that require strategy to be implemented. What type and what is the function and capabilities of the equipment that will be bought? What manufacturing process will be used? And if appropriate, how do principal competitors conduct their manufacturing? Provide a drawing of the production unit showing the path of materials and finished goods. Provide procedures for monitoring and controlling the product/service. List the principal suppliers of raw materials. And note the proposed number of employees (if any) and the initial training to be provided.

**The Financial Plan:** Is this business financially viable? Provide the following information: 1/ The total amount of funding required to start the business and where this funding will be obtained, 2/ A detailed set of cash flow forecasts, 3/A projected profit and loss account, 4/Details of the costing and pricing of the product/service.

## **Development Strategy**

**Main idea:** Ambitious objectives and key results to monitor their achievement can be planned strategically through the use of the OKR Framework.

Development strategy should outline how you plan to grow, sustain or pivot your business over time.

For Activity 4, development strategy, see Doerer, J. 2018. *Measure What Matters: The Simple Idea that grows x10 growth*, a handbook for setting, measuring and achieving ambitious goals. Additionally, see Doer's platform: *What Matters* [What Matters: Home: Leadership, goal-setting, and the OKR methodology](#) to learn more about how the goal-setting system of Objectives and Key Results has helped tech giants such as Google to Intel achieve their goals.

**Key points to consider:**

*Mission: What business are we in? Or what business should we be in?*

*Vision: Where do we want to be?*

*How are we doing? What is going well? What is less successful?*

*How did we get to this point? What went well? What went wrong?*

*How can we improve our position?*

What options are open to us?

What might hinder us from getting there?

What do we need to get there?

What should we not do?

**OKR framework (Objectives and Key Results):** Helps create alignment and engagement around measurable goals.

**Objectives:** Memorable, short, concise, inspirational and engaging qualitative descriptions of what you want to achieve. An objective should engage and motivate the team.

**Key results:** Each objective should have a set of 2 to 5 key results – a set of metrics that measure your progress towards the objective.

**Objectives should be ambitious, qualitative and inspiring. And key results should be specific and measurable, time-bound and aligned to the objective.**

Examples can be obtained from John Doerer's website: [What Matters: OKR Examples: How to Write Objectives & Key Results](#)

**Building Strategic Partnerships and Networks**

**Main idea:** Having a network of strategic partners is essential for sustainable growth. Startups can benefit enormously from complementary business partnerships that provide access to new markets, audiences and technologies, accelerating their path far beyond what they can achieve alone.

Having a network of strategic partners is essential for sustainable growth. Startups can benefit enormously from complementary business partnerships that provide access to new markets, audiences and technologies, accelerating their path far beyond what they can achieve alone.

Building a network of strategic partnerships is essential to accelerate market presence and accelerate growth trajectory far beyond what can be achieved alone. Benefits include access to new markets,

audiences and technologies and involve intentional effort, strategic foresight, alignment, mutual benefit and continuous reassessment.

### **KPI for Business Performance Monitoring**

**Main idea:** Dashboard is a tool that can be used to help monitor daily and weekly patterns within a business

To stay on track and as part of a business' strategic planning, key performance indicators (KPIs) can be defined and monitored. These can include financial KPI, Customer KPI and Operational KPI as examples. KPI can be monitored through the implementation of the tool: Dashboard.

**Dashboard** - Daily/weekly KPI (sales today, the number of customers that day or week, daily cash balance, order fulfilment rate) - used for measuring real-time operational management.

Dashboards display various metrics and KPIs through graphical interfaces such as graphs, charts and gauges. They are typically used to track performance for operational monitoring and are customisable to suit users' needs. Ensure that the key metrics and KPI are relevant to the specific needs of users and aligned with business objectives. Avoid monitoring KPI which do not provide an accurate reflection of business performance and actions to take next (avoid vanity metrics).

In comparison, the tool: Balanced Scorecard is used to monitor strategic perspectives, long-term strategy alignment: Profitability, revenue growth, cash flow; Customer: satisfaction, loyalty, market share; Internal Processes – efficiency, quality, innovation cycle; Learning & Growth – employee skills, innovation capacity, culture).

Both tools provide insights through business intelligence that lead to actionable decisions.

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## Practical action points/ Can I have some tips

- Ensure learners have a clear understanding of the Main ideas presented in the theoretical approach
- Support learners to develop their knowledge in a learner-centred, needs-based, supportive, inclusive and engaging learning environment.
- Use the theoretical information to help inform the activities provided in the toolbox.

## Evaluating success/Let's evaluate what I learnt

After each activity, learners should do the following assessment exercises to assess what they've learnt:

### Activity 1:

1. It is vital to validate a business idea during the initial stages to ensure there is a real demand for their product or service before significant money and time is invested. **T/ F**
2. Integral to the Lean Startup methodology is its focus on customer feedback during the final stages of the development of the product or services. **T/F (during the initial stages).**
3. The Lean Startup concept and its main principles are:
  - a. Minimum Viable product, Assessment and Split Testing
  - b. Actionable metrics vs vanity metrics, Recycling and Pivot
  - c. Minimum Viable product, Split Testing, Actionable metrics vs vanity metrics, Build-Measure-Learn.**
4. Market Research is the process of validating the assumptions and hypotheses about the customer's problems, needs and desires through direct interactions and feedback. **T/F**
5. Customer Delivery is the process of gathering and analysing data about size, trends, needs, and preferences of a specific market segment. **T/F**

### Activity 2:

1. Name the tool which is used to structure a business idea:
  - a. The Lean Startup
  - b. The Business Model Canvas**
  - c. The Business Startup Model
2. What elements are not part of the Business Model Canvas?
  - a. Customer segment, value propositions and channels
  - b. Customer revenue, Revenue Streams, Key Resources and Key Activities
  - c. Key partnerships and Cost Structure
  - d. Time Management and KPI Monitoring**
3. Which guiding question is used to analyse Customer Segment?
  - a. Why would they buy from us?
  - b. Who are we serving?**
  - c. What must we do to deliver value?

### Activity 3:

1. The Value Proposition Canvas is a tool that helps entrepreneurs shape the product or goal to the customers' requirements. **T/ F**
2. It consists of a Customer Profile section and a Values Map. **T/F**
3. The Customer Profile section consists of 2 parts: Jobs and Pains. **T/ F (and gains)**
4. The Values Map is made up of 2 parts: Products/ Services and Pain relievers **T/F (and Gain creators)**
5. It is recommended to fill out both sides of the Value Proposition Canvas (Customer Profile and Values Map) simultaneously. **T/F (start with the Customer Profile).**
6. Use arrows to link up aspects which address each side (e.g. pains – pain relievers). **T/F**

### Activity 4:

1. A business plan should start with an executive summary. **T/F**
2. The last section of a Business Plan is the Background and Description of the Business. (The Financial Plan) **T/F**

3. The OKR tool is used by organisations to set ambitious objectives and define measurable key results to track progress. **T/F**
4. The OKR tool defines the vision of a company. **T/F (the objectives and key results)**

#### **Activity 5:**

1. Startups can achieve more by working alone than in partnership with complementary businesses. **T/F (in partnership)**
2. Identifying, approaching and negotiating strategic partnerships can support entrepreneurial ventures. **T/F**
3. Benefits of forming partnerships include access to new markets, audiences and technologies and involve intentional effort, strategic foresight, alignment, mutual benefit and continuous reassessment. **T/F**

#### **Activity 6:**

1. It isn't necessary to define and monitor key performance indicators to stay on track and as part of a business' strategic planning. **T/F**
2. Balanced Scorecard is a tool for measuring long-term strategy alignment. **T/F**.
3. Dashboard is a tool for measuring real-time operational management. **T/F**
4. Both tools support entrepreneurial decision-making but serve different purposes. **T/F**.

#### **Reflection**

- Which concepts and tools do you feel most confident in teaching to entrepreneurship education learners after having engaged with this learning unit?
- Which tools do you feel you need to read more about?
- What teaching methodologies and approaches will you use to transfer knowledge and skills for the entrepreneurial journey to your entrepreneurship learners?

## Tool n°1: Validating your business idea – The Lean Startup

### AIM

Every entrepreneurial journey begins with an idea, but how do you know if it has the potential to become a valid business?

The aim of this activity is to demonstrate to trainers how to support entrepreneurship learners to validate their business idea during the initial stages to ensure there is a real demand for their product or service before significant money and time is invested.

At the end of the lesson, trainers will evaluate the teaching methods and activities used with them during the lesson and consider their effectiveness, reflecting on aspects they may adjust/improve when teaching their own entrepreneurship learners.

### LEARNING OUTCOMES

Participants will be equipped with the knowledge and skills to teach entrepreneurship learners to validate their business ideas by utilising aspects of the Lean Startup Methodology.

### DURATION

90 minutes.

### MATERIALS

PowerPoints slide (See process step 2).

### METHODOLOGY

Participants in this activity engage in experiential learning and reflection, developing their collaboration and communication skills. It also aligns with EntreComp dimensions: Ideas and Opportunities.

### PROCESS

1. Introduce the concept – that it is vital to validate a business idea from the very start to ensure the product or service meets the needs of customers, thus reducing market risks and the loss of time and finances.
2. Ask learners (trainers) if they know of an effective tool for validating a business idea? And if they do, ask them to share what they know.  
Confirm their points or introduce the Lean Startup using the information in the Theoretical Approach to create PowerPoint slides.
3. Focus learners' attention on the main principles of the Lean Startup. If they already know about this model, ask them to discuss what they know about each principle. If not, ask them to try to predict what each principle is about.
4. Obtain feedback and put learners into groups of 4. Give each learner in the group a different principle to read about. Next, learners summarise this principle to their group members.  
Obtain feedback (a summary of each principle) and conclude that validation involves testing assumptions about the problems your idea solves, identifying your target customers and confirming whether your solution meets their needs. Entrepreneurs should ask themselves 3 key questions (What problem does your idea solve? Who are your target customers? What existing solutions do customers currently use?)
5. Ask learners to brainstorm activities that entrepreneurs can engage in to obtain early feedback about and from their potential customers? (Customer Delivery and Market Research) Review the difference between these methods and elicit example activities for each.
6. Group work and presentation:

Ask learners to think of a problem they've faced recently and how a product or service could have helped solve it. Ask them to write down their ideas and form small groups and share their thoughts.

Provide learners with different startup ideas in small groups: for example, an online learning website, a wellness app, pet services (grooming, pet-sitting, etc), and so on.. Or let them decide for themselves (using their idea from the intro to this activity).

Ask learners to:

- a. answer the 3 questions above (What problem does your idea solve? Who are your target customers? What existing solutions do customers currently use?),
- b. decide that their Minimal Viable Product could look like,
- c. decide on what market research and customer discovery they would engage in to validate the idea,
- d. what might their split testing involve?

Groups will present their ideas and test one of their chosen methods for customer discovery/ market research on the other class members.

7. Learners share their thoughts and feedback on each groups' presentation and proposed methods. How effective was the market research method used on class members?

8. Reflection:

Next, ask learners to reflect on the activities they have just engaged in during the course of this lesson think back to the way the trainer introduced the theory behind the Lean Startup and main principles, and the practical exercise.

- Outline the key concepts regarding the validation of a business idea that the activity covered.
- Were the activities used (jigsaw reading, practical exercise: roleplay scenario, group discussion, PowerPoint presentation) effective to introduce the key concepts. Main principles and practice validating a business idea? How could they have been improved? How would you do it differently? Why?

9. Finish with the assessment questions provided in the introduction to this unit.

## TIPS FOR TRAINERS

- Create visually appealing PowerPoint slides that are succinct and engaging.
- Jigsaw reading can be made into an active activity by taping the sections to the wall. Learners have to get up and go to their assigned text before joining their group to summarise.
- For process step 8, support learners to create one of their research methods (e.g. a survey, interview, etc) to test on their peers. Don't only focus on this in theory, provide a space to practice it.
- Create a student-centred, needs-based, supportive and inclusive learning environment
- The Process Steps are a guide. Adapt the process as necessary to suit learners' needs.
- Process step 8: Encourage learners to reflect on the different teaching activities used within the lesson and share how they might adapt these to suit their learners' needs.

## ASSESSMENT

- Learning can be assessed according to the following criteria:
- Contribution to discussions, group presentation (use of MVP and split testing) and market research/ customer discovery tool created.

## REFERENCES

Ries, E, 2011. The Lean Startup: How Today's Entrepreneurs Use Continuous Innovation to Create Radically Successful Businesses.

## Tool n°2: Structuring your business idea – The Business Model Canvas

### AIM

The aim of this lesson is to train trainers in how to deliver training to entrepreneurship learners in how to structure their business ideas using a trusted visual framework.

At the end of the lesson, trainers will evaluate the teaching methods and activities used with them during the lesson and consider their effectiveness, reflecting on aspects they may adjust/improve when teaching their own entrepreneurship learners.

### LEARNING OUTCOMES

Participants will be equipped with the knowledge and skills to teach entrepreneurship learners to structure their business ideas using the Business Model Canvas, a visual framework that outlines the fundamentals of a business.

### DURATION

105 minutes.

### MATERIALS

Handouts of the official BMC template.

### METHODOLOGY

This exercise is based on experiential and visual learning. It uses the Business Model Canvas as a hands-on framework that supports conceptual thinking, creativity, and collaboration. It also aligns with EntreComp dimensions: Ideas and Opportunities and Resources.

### PROCESS

1. Ask learners to think of a new business they've seen recently and were impressed by. Maybe they bought their product or used the service? Ask them to consider what made it work, why did they buy it?
2. Ask learners to name a business tool that helps businesses create, deliver and capture value? – the Business Model Canvas (BMC). Explain that today they'll learn about it through a practical activity: structuring a business idea using the model.
3. Give learners the Business Model Canvas template listing and ask them to discuss in pairs what each element could be about? Discuss one together, customer segment together as a whole class to start them off (Who are we serving? / Who is our product for?)
4. Play the short video available on the Strategyzer website about the BMC, available here to confirm answers: [Business Model Canvas – Download the Official Template](#)
5. Put the learners into groups and give each group a different business idea, for example, an app that connects freelancers with last-minute jobs, a boutique fitness studio in a busy city, local farm to table meal kit subscription, mobile bicycle repair service, wellness weekend retreat for professionals, etc.  
Give each group a blank BMC template handout to structure their idea.  
Set a time limit (30 mins). Learners should work together to complete the template with their group.
6. Once the Business Model Canvas is complete, trainers should stress how simple and effective the process was – and all in one page!
7. Group work – group work and presentation.

Put the learners into groups and give each group a different business idea, for example, an app that connects freelancers with last-minute jobs, a boutique fitness studio in a busy city, local farm to table meal kit subscription, mobile bicycle repair service, wellness weekend retreat for professionals, etc.

Give each group a blank BMC template handout to structure their idea.

Set a time limit (25 mins). Learners should work together to complete the template with their group.

Learners present their ideas to the class. To enhance motivation and add some fun – turn it into a competition. Learners vote at the end for the best pitch!

8. Reflection: Next, ask learners to reflect on the activities they have engaged in during the course of this lesson -
  - Outline the key concepts regarding the Business Canvas Model that the activity covered.
  - Were the activities used (video, practical exercise: roleplay scenario, group discussion, reflection) effective to introduce the key concepts of structuring a business idea? How could they have been improved? How would you do it differently? Why?
9. Finish with the assessment questions provided in the introduction to this unit.

### TIPS FOR TRAINERS

- To enhance motivation and add some fun – turn Process Step 7 into a competition. Learners vote at the end for the best pitch.
- Move around the groups as the learners engage in the group work task, offering guidance and support where needed.
- Encourage learners to provide respectful feedback on each groups' business idea/presentation.
- The Process Steps are a guide. Adapt the process as necessary to suit learners' needs.
- Process step 8: Encourage learners to reflect on the different teaching activities used within the lesson and share how they might adapt these to suit their learners' needs.

### ASSESSMENT

- Learning can be assessed according to the following criteria:
- Learner's ability to apply the Business Canvas Model to the business idea given during the set task.

### REFERENCES

- Strategyzer, 2025. The Business Model Canvas. [Business Model Canvas – Download the Official Template](#)
- Masterclass, 2021, Business Model Canvas Explained: Definition and Components. [Business Model Canvas Explained: Definition and Components - 2025 - MasterClass](#)
- Strategic Management Insights, 2025. Business Model Canvas (BMC). [Business Model Canvas \(BMC\): The Ultimate Guide - SM Insight](#)

## Tool n°3: Aligning your product or service with customer needs and values – Value Proposition Canvas

### AIM

You've validated and structured your business idea. But, how do you ensure it has value for your customers?

The aim of this lesson is to train trainers to deliver training to their entrepreneurship learners in how to ensure their product or service is aligned with customer needs and values.

At the end of the lesson, trainers will evaluate the teaching methods and activities used with them during the lesson and consider their effectiveness, reflecting on aspects they may adjust/improve when teaching their own entrepreneurship learners.

### LEARNING OUTCOMES

Participants will be equipped with knowledge and tools to deliver entrepreneurship training in business idea validation using the Value Proposition Canvas, a business tool for exploring customer needs more deeply and aligning solutions more precisely with those needs.

### DURATION

75 minutes.

### MATERIALS

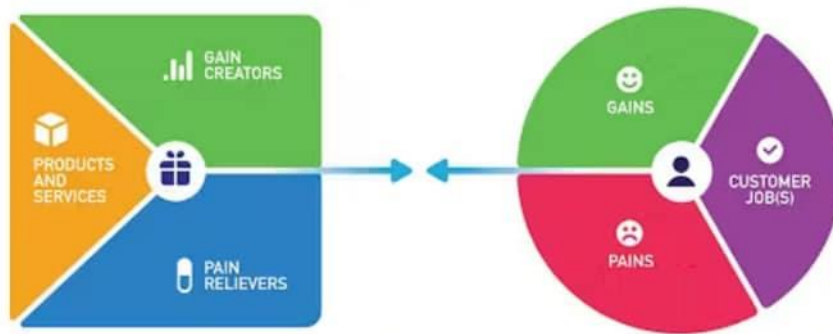
- The Value Proposition Canvas official template: [Value Proposition Canvas – Download the Official Template](#)
- A handout using content from this blog: [Value proposition canvas: comprehensive guide with examples](#) which outlines the steps involved when using a Value Proposition Canvas,
- Whiteboard, board markers.

### METHODOLOGY

This exercise is based on experiential and visual learning. It uses the Value Proposition Canvas as a hands-on framework that helps users precisely define customer profiles, visualise the value created and achieve product market fit. Case studies will also be used to allow evaluation of real-world practices. This exercise also aligns with EntreComp dimensions: Ideas and Opportunities and Resources.

### PROCESS

1. Elicit learners' knowledge of the Value Proposition Canvas.
2. Play the video 'The Value Proposition Canvas explained' by Strategyzer: [Value Proposition Canvas – Download the Official Template](#) and provide learners with a copy of the template, downloadable on the same page as the link provided and have this image up on a screen:



Source: [Value proposition canvas: comprehensive guide with examples](#)

Editable version for translating: [edit.org/edit/all/2qturz74gusk4kk8](https://edit.org/edit/all/2qturz74gusk4kk8)

3. Present the information to learners or provide a handout of the key aspects and steps involved when using the Value Proposition Canvas using content from this source: [Value proposition canvas: comprehensive guide with examples](#) After reading, learners can summarise the main points in pairs.
4. Role Play: Learners are given a real product or service per pair. One acts as a customer, the other as an interviewer to discover the gains and pains.
5. Group work and presentation:  
Learners use the information from the role play to fill out first, the Customer Profile and then the Value Map.  
They should identify jobs, pains, gains and then identify corresponding pain relievers and gain creators. Each group presents their canvas.  
The group provides feedback: Are the gain creators aligned with the biggest gains? Are the pain relievers directly addressing real pains? Any gaps / mismatches?
6. Reflection:
  - Value Proposition Canvas: Where could you apply the VPC in your own work/ projects? What challenges might you face when trying to fill in a real customer's pains / gains?
  - Teaching Methodology Reflection: Encourage reflection on the teaching activities used in this lesson: What worked well? What could be done differently?
7. Finish with the assessment (True/False questions) provided in the introduction to this unit.

## TIPS FOR TRAINERS

- Use simple, relatable case studies to make the analysis engaging and easy to follow.
- Support learners while they work in groups by providing guidance where required.
- Provide a supportive learning environment where learners feel at ease when giving presentations.
- Encourage learners to give respectful feedback to other groups' presentations.
- The Process Steps are a guide. Adapt the process as necessary to suit learners' needs.
- Process step 6: Encourage learners to reflect on the different teaching activities used within the lesson and share how they might adapt these to suit their learners' needs.

## ASSESSMENT

Learning can be assessed according to the following criteria:

Learner's ability to apply the Value Proposition Canvas to the business idea given during the set task.

Learner's ability to evaluate and provide feedback on the Value Proposition Canvasses presented by other groups.

## REFERENCES

Strategyzer, 2025. The Value Proposition Canvas. [Value Proposition Canvas – Download the Official Template](#)

Awware, 2021. Value proposition canvas: comprehensive guide with examples. [Value proposition canvas: comprehensive guide with examples](#)

## Tool n°4: Formalising the Business Plan and Strategic Development

### AIM

You've validated and structured your business idea and ensured it has value for customers. How do you now structure your business plan, providing detailed content for potential funders? And how do you ensure ongoing development strategy?

The aim of this lesson is to show trainers how to support their entrepreneurship learners with writing a business plan. Which content should be included and how should it be structured? Secondly, this lesson explores development strategy: the setting of ambitious objectives and key results to measure achievement of these goals.

At the end of the lesson, trainers will evaluate the teaching methods and activities used with them during the lesson and consider their effectiveness, reflecting on aspects they may adjust/improve when teaching their own entrepreneurship learners.

### LEARNING OUTCOMES

Participants will be equipped to support their entrepreneurship learners to develop content and structure it appropriately to create a formal business plan.

Participants will also acquire knowledge and skills to model development strategy to their entrepreneurship learners: the setting of goals and key results to monitor achievement.

### DURATION

90 minutes.

### MATERIALS

- Process Step 2: Provide learners with a handout which features an explanation of what each section of a business plan involves (not in the correct order) and the titles of these sections. For example:
- *Match the definition of what information is included with the correct section title of the business plan and order them as to how they should appear in a business plan.*
- Access relevant materials from your countries' local enterprise office or use the content provided by Ireland's Local Enterprise Office: Business Plan Tools. [Business Plan Tools - Local Enterprise Office - Waterford](#)
- A PowerPoint slide showing the correct order of the sections of a business plan (see Process step 4)
- A PowerPoint slide showing strategic planning considerations (see Process step 5)
- A PowerPoint slide for Process step 6.

### METHODOLOGY

This exercise involves active learning, group discussion and collaboration to work out the content and structure of a business plan and to engage in strategic planning through the use of the OKR framework. This exercise also aligns with EntreComp dimensions: Ideas and Opportunities and Resources.

### PROCESS

1. Ask learners to discuss the purpose and importance of designing a business plan.
2. Ask learners to brainstorm what information a business plan should contain – and in which order this information should be structured?

3. Obtain feedback and provide the task: Handout and group work: Learners work together to match the sections of a business plan with the explanation of what this is and put them in order of how they should appear in a business plan (*See Materials Required*).
4. Discuss the answers together and show the correct order on a PowerPoint slide
5. Inform learners next they will consider the importance of development strategy. Explain that your development strategy should outline how you plan to grow, sustain or pivot your business over time. Ask learners to discuss what questions organisations need to consider to do so? Work in small groups to come up with questions.

Obtain feedback and have the points to be considered included on a PowerPoint slide:

Mission: *What business are we in? Or what business should we be in?*

- *Vision: Where do we want to be?*
- *How are we doing? What is going well? What is less successful?*
- *How did we get to this point? What went well? What went wrong?*
- *How can we improve our position?*
- *What options are open to us?*
- *What might hinder us from getting there?*
- *What do we need to get there?*
- *What should we not do?*

6. Elicit and review what learners know about the OKR framework:

The OKR is used by organisations to set ambitious objectives and define measurable key results to track progress: OKR (Objectives and Key Results). It helps create alignment and engagement around measurable goals.

Show a PowerPoint slide which provides more detail about this:

*Objectives:* Memorable, short, concise, inspirational and engaging qualitative descriptions of what you want to achieve. An objective should engage and motivate the team.

*Key results:* Each objective should have a set of 2 to 5 key results – a set of metrics that measure your progress towards the objective

Slide 2: show some examples taken from John Doerer's website: [What Matters: OKR Examples: How to Write Objectives & Key Results](#)

Emphasise that objectives should be ambitious, qualitative and inspiring.

And key results should be specific and measurable, time-bound and aligned to the objective.

7. Ask learners to think of a business idea in small groups and come up with 2 objectives for this business. Brainstorm 3 – 5 key results which could be used to measure whether this objective was met.  
  
Groups present their business idea, objective and key results to their peers and provide feedback on each group's suggestions.
8. Learners evaluate the effectiveness of the teaching activities experienced during this activity.
9. Finish with the assessment provided in the introduction to this unit.

- Encourage learners to work together to engage with the tasks, using critical thinking and collaborative learning.
- Elicit answers from learners rather than feeding them the answers. Encourage active learning and commitment.
- The Process Steps are a guide. Adapt the process as necessary to suit learners' needs.
- Process step 6: Encourage learners to reflect on the different teaching activities used within the lesson and share how they might adapt these to suit their learners' needs.

## ASSESSMENT

Learning can be assessed according to the following criteria:

Learner's ability to design relevant and suitable Objectives and Key Results.

## REFERENCES

Doer, J. 2018. Measure What Matters: The Simple Idea that grows x10 growth.

Doer, J. 2025. What Matters. Website by John Doer: [What Matters: Home: Leadership, goal-setting, and the OKR methodology](#)

Local Enterprise Ireland. Waterford. Publications-Resources. Business Plan Tools. [Business Plan Tools - Local Enterprise Office - Waterford](#)

CMI, 2020. Developing Strategy. [Developing Strategy - CMI](#)

Sparks, R. Atlassian. What is an OKR? [OKRs: The Ultimate Guide | Atlassian](#)

## Tool n°5: Building Strategic Partnerships and Professional Networks

### AIM

Having a network of strategic partners is essential for sustainable growth. Startups can benefit enormously from complementary business partnerships that provide access to new markets, audiences and technologies, accelerating their path far beyond what they can achieve alone.

The aim of this activity is to guide trainers to deliver training to entrepreneurship educators in how they can teach their entrepreneurship learners to identify, approach and negotiate strategic partnerships that can support their entrepreneurial ventures.

At the end of the lesson, trainers will evaluate the teaching methods and activities used with them during the lesson and consider their effectiveness, reflecting on aspects they may adjust/improve when teaching their own entrepreneurship learners.

### LEARNING OUTCOMES

Participants will be equipped with the knowledge to lead learners to identify, approach and negotiate strategic partnerships that can support their entrepreneurial ventures. They will be able to guide learners to practice pitching and listen actively in networking situations, learn to identify complementary strengths and gaps, explore how to structure mutually beneficial partnerships and build confidence in approaching and negotiating collaborations.

### DURATION

60 minutes.

### MATERIALS

Create a set of business profile cards to hand out: 1 card per 2 learners Each card shows a different business, its strengths, weaknesses, needs and goal. All cards should be interlinked so that learners can identify potential partnerships.

#### CARD 1

<b>Business</b>	FRESHBITE FOODS: Healthy Meal Kit Startup
<b>Strengths</b>	Creativity, strong nutritionist team, healthy ingredients
<b>Weaknesses</b>	Limited distribution and delivery, marketing.
<b>Needs</b>	Logistics/ delivery partner, eco-branding credibility, access to community
<b>Goals</b>	Expand into 3 major cities within 12 months

**Notes for trainer:** Potential partners = GreenMove logistics, Community First, BrightTechSolutions, Circular Fashion

## CARD 2

<b>Business</b>	GREENMOVE LOGISTICS: Eco-friendly Delivery Service
<b>Strengths</b>	Reliable, electric vehicle fleet, sustainability reputation
<b>Weaknesses</b>	Limited clients outside small pilot programmes
<b>Needs</b>	Stable long-term clients, consumer-facing brand visibility
<b>Goals</b>	Sign contracts with 5+ growing startups

**Notes for trainer:** Potential partners = FreshBite Foods, BrightTech Solutions, Circular Fashion

## CARD 3

<b>Business</b>	BRIGHTTECH SOLUTIONS: Eco-friendly Productivity & Lifestyle Mobile App
<b>Strengths</b>	Strong development tech team, customisable features, growing small business
<b>Weaknesses</b>	Weak marketing reach, low visibility with consumers
<b>Needs</b>	Strategic partners with customer access, co-marketing campaigns, a trendy/on-trend revamp
<b>Goals</b>	Double user-base in 6 months

**Notes for trainer:** Potential partners = FreshBite Foods, Community First, Circular Fashion

## CARD 4

<b>Business</b>	COMMUNITY FIRST: Social Enterprise: Skills & Training Hub
<b>Strengths</b>	Deep community trust, volunteer network, NGO/Government support
<b>Weaknesses</b>	Limited funding, weak digital presence, weak branding/ marketing
<b>Needs</b>	Sponsors, scalable solutions, tech platforms for outreach
<b>Goals</b>	Expand training to rural areas while sustaining operations

**Notes for trainer:** Potential partners = BrightTech Solutions, FreshBite Food, Circular Fashion

## CARD 5

<b>Business</b>	CIRCULAR FASHION: ethical clothing company
<b>Strengths</b>	Eco-friendly, on-trend.
<b>Weaknesses</b>	Delivery partner, lack of community involvement, weak branding and marketing
<b>Needs</b>	Community involvement, delivery partner, training programme.

<b>Goals</b>	To establish a training programme in circular fashion for learners with less opportunities
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**Notes for trainer:** Potential partners: CommunityFirst, GreenMove logistics, FirstBite Foods, BrightTech Solutions

## METHODOLOGY

This exercise is based on experiential and collaborative learning through a role-playing scenario that encourages them to identify complementary strengths and gaps and form strategic partnerships with complementary businesses. It also aligns with EntreComp dimensions: Ideas and Opportunities and Resources.

## PROCESS

1. Highlight the importance and benefits of building a network of strategic partnerships.
2. Provide a real-world example to demonstrate, such as IBM whose partner ecosystem spans software providers, consultants and service integrators globally, significantly contributing to its longevity and sustained relevance. Ask learners if they can think of any more examples?
3. Role-play and class discussion.  
Put learners into pairs and give them the same business profile card as their partner. Explain the task and encourage creativity: joint ventures, co-marketing, supplier relationships, resource sharing, support networks, etc.  
Learners move around the room individually and meet other 'businesses.' Their role is to pitch who they are and explore how they could partner with the other business (What value can they exchange?). Learners should make at least two partnerships.  
Learners regroup with their partner and compare the connections they made, and the value gained from each partnership. Encourage learners to create a Partnership map – a visual representation of the partnerships made, and value gained.  
Class discussion: Provide some questions to encourage reflection:
  - What partnerships were the most valuable and why?
  - What strategies worked best when pitching your business?
  - How did you identify a win-win situation?
  - How does this exercise translate to real-world networking?
  - What online tools and platforms can you use to help establish networks and form partnerships?
5. Learners evaluate the effectiveness of the teaching activities experienced during this activity.
6. Finish with the assessment provided in the introduction to this unit.

## TIPS FOR TRAINERS

- Encourage learners to pitch their business clearly and succinctly, in a professional and engaging manner.
- Encourage learners to listen actively to their peers and seek to form partnerships where appropriate, artfully negotiating how they can benefit the other.
- The Process Steps are a guide. Adapt the process as necessary to suit learners' needs.
- Process step 5: Encourage learners to reflect on the different teaching activities used within the lesson and share how they might adapt these to suit their learners' needs.

## ASSESSMENT

Learning can be assessed according to the following criteria:

Learner's ability to engage well with their peers and identify and form complimentary partnerships.

## REFERENCES

- Fan, W, 2025. Entrepreneur. How to Build the Ultimate Partner Network for your Startup. [How to Build the Ultimate Partner Network for Your Startup | Entrepreneur](#)

## Tool n°6: Performance Monitoring and Evaluation – Dashboard and Balanced Scorecard.

### AIM

To stay on track and as part of a business' strategic planning, key performance indicators (KPIs) must be defined and monitored. These can include financial KPI, Customer KPI and Operational KPI as examples.

The aim of this activity is to encourage trainers to review tools for monitoring business performance with educators and explore the difference between a Balanced Scorecard (long-term strategy alignment) and a Dashboard (real-time operational management). It aims to demonstrate how both tools support entrepreneurial decision-making but serve different purposes. After participating in this lesson, educators will be able to deliver training to their entrepreneurship learners in this subject.

At the end of the lesson, trainers will evaluate the teaching methods and activities used with them during the lesson and consider their effectiveness, reflecting on aspects they may adjust/improve when teaching their own entrepreneurship learners.

### LEARNING OUTCOMES

Participants will be equipped to guide entrepreneurship learners to implement KPI business performance monitoring measures in their business to ensure performance is monitored, evaluated and continuously improved.

### DURATION

60 minutes.

### MATERIALS

- 2 blank pieces of paper per small group
- Marker pens.

### METHODOLOGY

This exercise is based on experiential learning. Learners will experience the difference between using a Balanced Scorecard (BSC) and a Dashboard in the context of monitoring business performance and strategic planning for entrepreneurship. Learning is hands-on and team-based, and comparison and reflection are encouraged. It also aligns with EntreComp dimensions: Ideas and Opportunities and Resources.

### PROCESS

1. Tell learners to imagine they are pilots flying their new business (startup) and in the cockpit they have 2 tools: The Dashboard, which tells them what is happening right now (fuel, speed, altitude), and the Balanced Scorecard, aligns their flight path to their ultimate destination and vision.
2. Ask learners how this might relate to entrepreneurship, what might be the equivalent to fuel, speed and altitude and flight path?  
Dashboard = daily/weekly KPI (sales today, sales per week,)  
Balanced Scorecard = strategic perspectives (financial, customer, internal processes and learning and growth).
3. Team simulation

Divide learners into small groups of 3-5 per team. Give each team a business idea (e.g. an online clothing store, a tech app, etc).

First, ask each team to build the Dashboard: choose 5 -7 daily/ weekly KPI it would be important to monitor and write them on a piece of paper. (Some examples: the number of customers that day or week, daily cash balance, order fulfilment rate, etc).

Next, ask learners to build the Balanced Scorecard. They should design a 1-page Balanced Scorecard which details measures across the 4 perspectives: Financial, Customer, Internal Processes and Learning & Growth. (Some examples: Financial- profitability, revenue growth, cash flow; Customer: satisfaction, loyalty, market share; Internal Processes – efficiency, quality, innovation cycle; Learning & Growth – employee skills, innovation capacity, culture).

Ask learners to stick their 2 pieces of paper to the wall and walk around taking a look at their peers' ideas and see what patterns they notice.

Facilitate a discussion with the whole group:

- What differences did you see between the Dashboards and the Balanced Scorecards?
- Discuss the benefits of both tools.
- 4. Learners evaluate the effectiveness of the teaching activity experienced during this activity.
- 5. Finish with the assessment questions provided in the introduction to this learning unit.

#### TIPS FOR TRAINERS

- Encourage learners to collaborate as a team to brainstorm ideas to include in their dashboard and balanced scorecard.
- Encourage learners to compare and reflect on the ideas presented by their peers.
- The Process Steps are a guide. Adapt the process as necessary to suit learners' needs.
- Process step 4: Encourage learners to reflect on the different teaching activities used within the lesson and share how they might adapt these to suit their learners' needs.

#### ASSESSMENT

Learning can be assessed according to the following criteria:

Learner's ability to engage well with their peers and create a Dashboard and Balanced Scorecard for their business idea.

#### REFERENCES

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- West. C. 2024. Achieving Business KPIs: How do Dashboards and Scorecards Drive Business Excellence and Strategic Success? [Achieve Business KPIs with Dashboards and Scorecards](#)

Total Time:

**5** hours

## Learning Unit 3

# The legal status of a company and its impact on the entrepreneur

# Learning Unit 3: The legal status of a company and its impact on the entrepreneur

## Definition/What is this about

In Europe, **the legal status of a company depends on the specific EU Member State** in which it is established or, for cross-border operations, a designated European legal form, such as the *Societas Europaea* (SE). Companies must be registered in a business register within an EU country to be recognized as a distinct legal entity. Common legal statuses include sole proprietorships, partnerships, and various forms of limited liability companies like the [Societas Privata Europaea](#) (SPE). This chapter is essential for equipping entrepreneurship trainers with the knowledge to deliver entrepreneurship training in the importance of choosing the proper legal status of a company and the motivations behind this choice

## Learning Objective / What can I learn?

By the end of this unit, trainers will be able to:

- Conduct a comparative analysis of the legal statuses of various companies.
- Determine the most suitable social security system approach for a company.
- Organise the comparison of various tax regulations in accordance with the specific status of the company.
- Determine the appropriate social economy models for the company's requirements.

## Introduction / What is included?

This unit includes:

- Comparative approach to possible company statuses and associated social security and tax rules
- Choosing the company's tax and social security status
- Choosing the entrepreneur's tax and social security status
- The models of social economy for entrepreneurship

## Theoretical approach

### 1. Key Aspects of a Company's Legal Status

A company's legal status, also known as its legal form, refers to the legal framework under which it operates, defining its identity, rights, obligations, and responsibilities to its owners, third parties, and the state. This status, which can be a sole proprietorship, partnership, or corporation (including limited liability companies (LLCs)), determines its tax regime, personal liability for debts, governance structure, and growth opportunities.

When a company is registered, it becomes a legal entity (separate from its founders or owners) meaning it can enter into contracts, own property, hire employees, be sued or sue in its own name, continue to exist regardless of ownership changes. This concept of separate legal personality is central to European company law and distinguishes formal companies from informal business activities.

Although the European Union (EU) promotes harmonization of company law, each member state retains its own national legal framework and registration system.

EU directives and regulations ensure certain minimum standards, particularly in:

- company formation and disclosure,
- protection of shareholders and creditors,
- accounting and auditing standards,
- cross-border mergers and conversions.

However, the specific company types, registration procedures, and tax implications differ among European countries.

In the next chapter (2. Main Legal Statuses of Companies in Europe) the different statuses will be briefly explained. In order for the young entrepreneurs to fully comprehend their meaning, it is essential that the entrepreneurship trainers introduce the following key concepts.

### **Separate Legal Entity**

In most company structures, the business is recognized by law as a distinct entity from its owners, possessing the rights and duties of a natural person.

### **Personal Liability**

For many company types, the owners' personal assets are protected from the company's debts and legal actions. This means creditors generally cannot pursue owners' personal wealth to satisfy company debts. Unlimited liability applies to sole traders and general partners while Limited liability applies to companies (Ltd, GmbH, SARL, etc.), meaning owners' personal assets are protected.

### **Legal Capacity**

A company with a defined legal status has the authority to engage in legal activities, such as entering into contracts, buying and selling property, and initiating or defending lawsuits in its own name.

### **Taxation**

The legal status determines the company's tax regime. For instance, a corporation may be subject to corporate income tax, while profits from a sole proprietorship are taxed as personal income for the owner.

### **Operational Rules**

The chosen legal status dictates the company's internal rules, governance, and legal framework, influencing its operational procedures and how it manages its activities.

### **Growth and Transferability**

Certain legal statuses, like corporations, offer greater potential for growth and make it easier to sell or transfer ownership of the business.

## 2. Main Legal Statuses of Companies in Europe

The legal structures available for businesses in Europe are somewhat similar across countries but come with different names and specific regulations. Selecting the appropriate entity is crucial for legal compliance and operational efficiency.

### A. Sole Proprietorship (or Sole Trader)

A sole proprietorship is the simplest form of business. It is owned and operated by one individual, with **no legal separation** between the owner and the business.

#### Examples:

- *Einzelunternehmen* (Germany)
- *Entreprise individuelle* (France)
- *Imprenditore individuale* (Italy)
- *Autónomo* (Spain)

Key Characteristics	Typical Use
Easy to establish; minimal bureaucracy.	Freelancers, artisans, small traders, and self-employed professionals
The owner has <b>unlimited personal liability</b> for debts.	
Profits are taxed as personal income.	
The business ceases upon the death or withdrawal of the owner.	

### B. Partnerships

A partnership involves two or more people conducting business together. It does not usually have a separate legal personality (except in some jurisdictions).

#### Examples:

- *Société en Nom Collectif (SNC)* in France
- *Offene Handelsgesellschaft (OHG)* in Germany
- *Società in Nome Collettivo (SNC)* in Italy

Key Characteristics	Variations and typical use
Partners share profits, losses, and management responsibilities	<b>Limited Partnership (LP):</b> one or more partners have limited liability ( <i>Kommanditgesellschaft</i> , <i>Société en Commandite Simple</i> ).
Each partner has <b>joint and several liability</b> for the firm's obligations	
Income is taxed through the partners personally	

**Professional Partnerships:** used by lawyers, accountants, doctors, etc.

### C. Limited Liability Company (Private Company)

This is the most common business structure in Europe. A limited liability company is a distinct legal entity whose owners (shareholders) are only liable up to the amount they invested.

#### Examples:

- *Gesellschaft mit beschränkter Haftung (GmbH)* – Germany, Austria
- *Société à Responsabilité Limitée (SARL)* – France, Luxembourg
- *Società a Responsabilità Limitata (SRL)* – Italy
- *Private Limited Company (Ltd)* – Ireland, Malta
- *Besloten Vennootschap (BV)* – Netherlands
- *Sociedad de Responsabilidad Limitada (SL)* – Spain

Key Characteristics	Typical Use
Separate legal personality	Small and medium-sized enterprises (SMEs), family businesses, and startups
Liability limited to capital contribution	
Minimum share capital requirement (varies — e.g., €1 in some countries, €25,000 in Germany)	
Shares cannot be freely traded on public markets	
Managed by directors appointed by shareholders	
Must file annual accounts and maintain transparency obligations	
Taxed as a corporate entity (subject to corporate income tax)	

### D. Public Limited Company (PLC)

A public limited company is a larger corporate structure designed for businesses that wish to raise capital through public share offerings or operate on a stock exchange.

#### Examples:

- *Société Anonyme (SA)* – France, Belgium, Luxembourg

- *Aktiengesellschaft (AG)* – Germany, Austria, Switzerland
- *Società per Azioni (SpA)* – Italy
- *Public Limited Company (plc)* – Ireland, Malta
- *Naamloze Vennootschap (NV)* – Netherlands
- *Sociedad Anónima (SA)* – Spain

Key Characteristics	Typical Use
Separate legal personality	Large corporations, listed companies, or businesses seeking outside investment
Minimum share capital required (often €25,000–€60,000)	
Shares can be publicly traded	
Subject to strict reporting, audit, and governance rules	
Taxed as a corporation	
Must have a board of directors and possibly a supervisory board	

### E. European Company (*Societas Europaea*, SE)

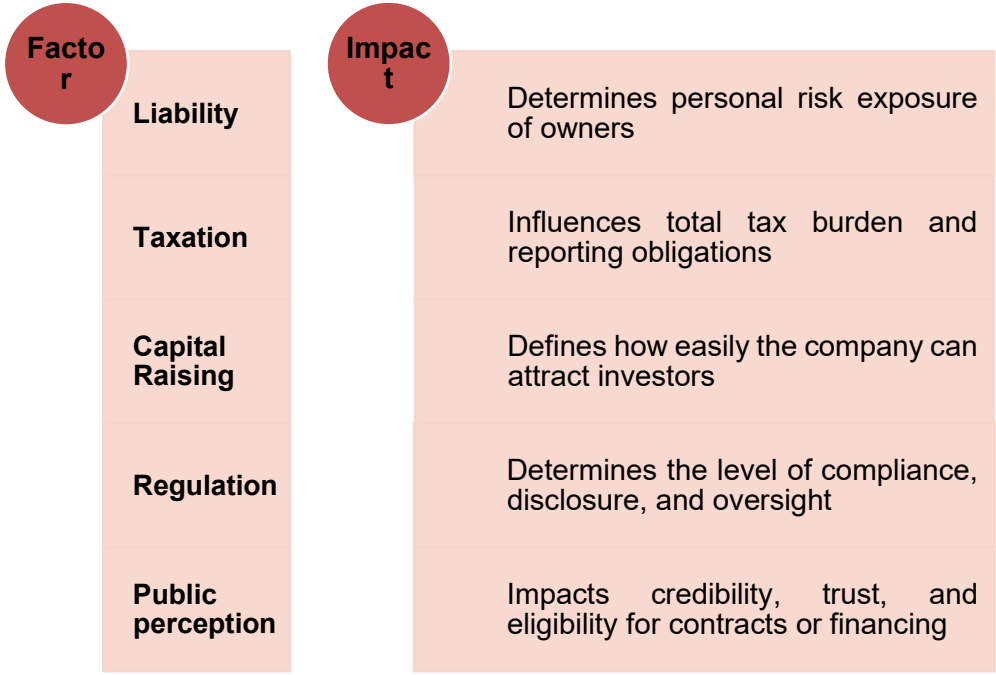
The European Company (SE) is a supranational corporate form introduced by EU Regulation (EC) No 2157/2001. It allows companies to operate across EU member states under a single European legal framework.

Key Characteristics	Typical Use
Can transfer its registered office between EU countries without dissolving.	Multinational corporations and companies operating across several EU states
Must have minimum share capital of €120,000.	
Can be formed by merger, holding, or conversion of existing EU companies.	
Subject to both EU law and the national law of the registered state.	
Promotes cross-border business mobility and integration.	

**Nonprofit Organizations (Associations, Foundations)** exist across Europe to pursue social, charitable, cultural, or educational goals rather than profit. They may receive tax exemptions if they meet certain public-benefit criteria.

**Cooperatives (Co-ops)** are owned and managed democratically by their members (e.g., Société Coopérative, Genossenschaft). Profits are distributed among members or reinvested.

The importance of choosing the right legal status is based on the fact that it affects nearly every aspect of a company's operations. The trainer can use the infographic below to highlight the impacts associated with some key aspects described previously



**3. Steps to Establish a Legal Entity in Europe**

While the specific requirements vary by country, the general process of setting up a legal entity in Europe involves several key steps:

- conduct market research** to validate the demand for your offerings and understand the competitive landscape;
- choose the legal structure** by selecting an entity type that meets your operational and financial needs;
- register the business name** to secure your company name legally;
- prepare legal documentation** by compiling the necessary documents for registration;
- open a bank account** to facilitate financial transactions and meet capital requirements;
- register with tax authorities** to comply with taxation obligations;
- comply with employment laws** to adhere to labour regulations for hiring staff;
- obtain necessary licenses and permits** to ensure legal operation within your industry.

Establishing a legal entity in Europe is a composite process that requires careful planning and execution. The trainer can consult the [guide at this link](#) (written by Inez Vermeulen, expert on entrepreneurial solutions) to have a comprehensive overview of the critical steps and considerations involved.

#### 4. Social Economy Models: What and Which ones?

Social economy models are frameworks for organizations, including cooperatives, mutual societies, associations, foundations, and social enterprises, that **prioritize social and environmental goals alongside financial sustainability**. These models are characterized by values like solidarity, participation, and cooperation, and they operate by reinvesting profits into their mission and community rather than maximizing returns for private shareholders.

Examples include organizations focused on [fair trade](#), the [circular economy](#), and community well-being, forming a sector that complements traditional public and private enterprises.

The social economy encompasses a wide range of legal structures, such as:

- **Cooperatives:** Member-owned and democratically controlled organizations.
- **Mutual Societies:** Organizations focused on providing social services or mutual support, like insurance.
- **Associations and Foundations:** Entities dedicated to social causes, including charities.
- **Social Enterprises:** Businesses that use commercial strategies to achieve social aims.

Examples of social economy models are **fair trade and organic trade** (that focus on ethical sourcing and sustainable production), **circular economy** models (aimed at minimising waste and maximise resource use through closed-loop systems, aligning with the social economy's environmental focus), and **community-based initiatives** (organizations anchored at the local level that foster community participation and solidarity to address specific social and economic needs).

#### 5. Social Security: what are the company obligations?

Social security is an essential aspect to consider when establishing a company. The following points about social security can help the trainer to provide an overview about what to consider in order to comply with the social security regulations:

- an employer has to register with the national social security (SS) system in the country where they operate;
- employer and employee that must pay contributions into that SS system (for pensions, health, unemployment, etc.);
- coordination between countries when employees are cross borders (which system covers them, which country's laws apply);
- each EU country has its own laws (there's no fully unified EU social security system).

The main Social Security rules when establishing a company can be summarised in the table below.

If an employer has employees working in an EU country, he/she must register the company with the social security institution of that country and register the employees there.

The general rule is: only one country's social security legislation applies to an employee at a time (typically the country where they work).

If the employer sends workers temporarily from one country to another ("posted workers"), there are special rules/forms (e.g., A1 certificate) to show they remain covered under the original country's system.

The trainers can use the comprehensive guide of the European Commission "[Paying social security contributions](#)" to explore in more detail the Social Security systems in Europe.

## 6. Conclusions

Identifying the company's requirements and needs is crucial when establishing a business, as this will determine the appropriate company status, the corresponding tax regulations and social security obligations.

The company needs are the foundational resources, capabilities, and goals a business requires to operate, grow, and achieve its objectives.

## Practical action points/Can I have some tips?

- Check prior knowledge or experience of the audience about the topic;
- Adapt the teaching method according to the previous point;
- Make sure to provide a general overview of the legal status of a Europe-based company;
- Customise the information provided according to the country you are (legal statuses and taxations may vary between countries);
- Incorporate case studies, examples, interviews from local actors;
- Engage young entrepreneurs with practical activities, role plays, dynamic settings;
- Do not standardise your teaching method, act upon young entrepreneurs' characteristics/culture/experiences;
- Collect young entrepreneurs' feedback

## Evaluating success /Let's evaluate what I learnt!

### **Multiple-choice quiz**

**Question 1: What does a company's legal status define?**

- A. Only the company's tax obligations
- B. The company's identity, rights, obligations, and responsibilities
- C. Only the ownership structure
- D. Only the company's products and services

**Answer:** B) The company's identity, rights, obligations, and responsibilities

**Question 2: Which key concept refers to a company being recognized as a separate entity from its owners?**

- A. Personal liability
- B. Separate legal entity
- C. Legal capacity
- D. Taxation

**Answer:** B) Separate legal entity

**Question 3: In a partnership, which of the following is true?**

- A. Owners have limited liability for business debts
- B. It is considered a separate legal entity from its owners
- C. Owners share responsibilities and profits, with personal liability for debts
- D. Only one individual owns the business

**Answer:** C) Owners share responsibilities and profits, with personal liability for debts

**Question 4: Which legal entity allows the company to offer shares to the public and is subject to stricter regulations?**

- A. Private Limited Company (LTD / S.r.l.)
- B. Public Limited Company (PLC)
- C. Sole Proprietorship
- D. Branch Office

**Answer:** B) Public Limited Company (PLC)

**Question 5: What is the main difference between a branch office and a subsidiary?**

- A. A branch office is a separate legal entity, a subsidiary is not
- B. A branch office is not a separate legal entity, a subsidiary is a separate legal entity
- C. Both are legally independent from the parent company
- D. Both have the same legal obligations as the parent company

**Answer:** B) A branch office is not a separate legal entity, a subsidiary is a separate legal entity

**Question 6: Which of the following is the first step in establishing a legal entity in Europe?**

- A. Register the business name
- B. Conduct market research
- C. Open a bank account
- D. Prepare legal documentation

**Answer:** B) Conduct market research

**Question 7: Which of the following is a characteristic of social economy models?**

- A. Maximizing returns for private shareholders
- B. Reinventing profits solely into executive bonuses
- C. Prioritizing social and environmental goals alongside financial sustainability
- D. Avoiding community participation

**Answer:** C) Prioritizing social and environmental goals alongside financial sustainability

**Question 8: Which type of organization in the social economy is member-owned and democratically controlled?**

- A. Social enterprise
- B. Cooperative

- C. Mutual society
- D. Foundation

**Answer:** B) Cooperative

### Reflection

- What tools can I use to teach with a student-centred approach?
- What practical activities can I use to engage young entrepreneurs and teach them about the legal status and taxation system in our country?
- How can I gather feedback in a constructive manner for both the young entrepreneurs and myself?

### References & Bibliography

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NordicHQ. List of legal entity types by country in Europe. [Link to the publication](#)

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EuroDev (2024). Social Security Tax Rates in Europe: Employer Guide 2024. [Link to the publication](#)

## Tool n°1: Company tax in the EU – Choose your business status.

### AIM

To help young entrepreneurs research legal forms available in their country (or chosen country) using a digital tool created by the European Union, fostering critical thinking to evaluate information, information literacy to find and assess credible sources, data analysis to interpret findings, problem-solving to address knowledge gaps, and effective communication to share results.

### LEARNING OUTCOMES

Participants will be able to define and present the business legal form according to the objectives and company needs.

### DURATION

90 minutes.

### MATERIALS

- Laptop, tablet, pc or smartphone, internet connection.

### METHODOLOGY

This exercise is based on research analysis. It uses the Company tax in the EU tool created in the framework of Your Europe.

### PROCESS

1. Introducing the concept. (10min)

Provide young entrepreneurs the link to the tool "[Company tax in the EU](#)". Young entrepreneurs have to use it to find the appropriate legal form of the business they want to start in a chosen country, as well as information on the tax regulation.

2. Demonstrate with a research example. (5min)

3. Invite young entrepreneurs to practice individually or in pairs or groups (according to the context). (40min)

4. Invite young entrepreneurs to present their business idea legal status and related tax rules and justify the selection. (15min)

5. Conclude with a peer feedback session and provide your feedback. (15min)

### TIPS FOR TRAINERS

Encourage young entrepreneurs to start by familiarising with the business terminology in order to be more precise in their research.

Make sure young entrepreneurs have clearly in mind the objectives of their business ideas (e.g. social entity? Individual or partnership? Etc.)

Use visual aids or collaborative tools to make the activity engaging and easy to follow.

Assist young entrepreneurs in the early stages of their research and check in with them from time to time to see if they need any help.

## INTERACTIVE LEARNING SEGMENT

Peer feedback forms after pitch presentations.

The peer review after each group presentation will encourage exchange of ideas and debates, enhance acquisition knowledge and knowledge retention

## ASSESSMENT

Completeness, coherence, and presentation of young entrepreneurs' research analysis on how to set up a business in a specific country considering needs, legal status and tax regulation, as well as their ability to explain and justify their choices

## REFERENCES

Your Europe. Company tax in the EU. [Link to the tool.](#)

## Tool n°2: Understanding the Legal Status of a Company.

### AIM

To help young entrepreneurs understand and map out different types of legal statuses of a company and compare them in order to identify the most appropriate one for a given context.

### LEARNING OUTCOMES

Participants will be able to differentiate between main legal forms of business (sole proprietorship, partnership, LLC, corporation, etc.), evaluate the advantages and disadvantages of each form and recommend an appropriate legal status for different business scenarios.

### DURATION

50-60 minutes.

### MATERIALS

Flipchart/whiteboard & markers, scenario cards (printed slips), quiz sheet or online quiz tool (Kahoot, Mentimeter, etc. optional).

### METHODOLOGY

This exercise is based on learning through simulation. It uses the scenario cards that foster critical thinking, creativity, collaboration and generate actionable insights.

### PROCESS

#### 1. Icebreaker (5 minutes)

Ask trainees: *“If you were starting your own business tomorrow, what legal form would you choose and why?”*

- Write their answers on a flipchart/whiteboard.
- Tell them that by the end of the session, they’ll be able to confirm or rethink their choice with more confidence.

#### 2. Mini-Lecture (10 minutes)

Trainer gives a short overview of the common legal statuses:

- Sole proprietorship – simple, cheap, but unlimited liability.
- Partnership – shared responsibility, but disputes/liability risks.
- Limited liability company (LLC / Ltd) – flexible, liability protection.
- Corporation (Inc / PLC) – separate legal entity, can raise capital, but more regulation.
- (Add local variations as needed).
- 

#### 3. Group Activity: Business Scenarios (20 minutes)

Instructions for trainer:

- Divide trainees into small groups (3–4 people).

- Give each group a different scenario card (see examples below).
- Ask them to discuss:
  1. Which legal status would best fit this business?
  2. Why is it the best choice?
  3. What risks/benefits should the owner consider?
- After 10 minutes, each group presents back to the class.

**Example Scenario Cards** (you can print/write down these on slips of paper):

1. *A freelance web designer working alone from home.*
2. *Two chefs opening a new restaurant together.*
3. *A tech startup planning to raise investment from venture capitalists.*
4. *A family opening a small retail store with plans to expand in 5 years.*
5. *A construction company bidding for large government contracts.*

#### **4. Debrief Discussion** (15 minutes)

- Trainer facilitates a whole-class discussion.
- Compare group answers, highlight correct reasoning.
- Summarize the key considerations when choosing legal status: liability, taxation, control, capital needs, compliance.

#### **Correct Answers for Scenario Cards**

**Scenario 1:** A freelance web designer working alone from home

Best legal status: Sole Proprietorship (or Single-Member LLC if liability protection is desired).

- Why:
  - Simple, low-cost to set up.
  - Full control by the individual.
  - Suitable when business risks are low.
  - Risks/benefits: Unlimited personal liability in a sole proprietorship; liability protection if choosing LLC.

**Scenario 2:** Two chefs opening a new restaurant together

Best legal status: Partnership (or LLC to limit liability).

- Why:
  - Multiple owners contributing skills and capital.
  - Flexible management arrangements.
  - Easy to start compared to a corporation.
- Risks/benefits:

- In a general partnership, partners are personally liable.
- An LLC offers liability protection and may be more attractive if business risks are high (like food safety, customer claims).

**Scenario 3:** A tech startup planning to raise investment from venture capitalists

Best legal status: Corporation (Inc / PLC).

Why:

- Preferred structure for attracting outside investors.
- Ability to issue shares, raise equity capital.
- Provides limited liability for founders and investors.
- Risks/benefits: More complex compliance, higher costs, stricter reporting obligations.

**Scenario 4:** A family opening a small retail store with plans to expand in 5 years

Best legal status: Limited Liability Company (LLC / Ltd).

- Why:
  - Provides liability protection (important for retail with customer-facing risks).
  - Flexible ownership structure for family members.
  - Easier to scale than a sole proprietorship.
- Risks/benefits: Slightly higher setup/admin costs than sole proprietorship, but safer for growth.

**Scenario 5:** A construction company bidding for large government contracts

Best legal status: Corporation (Inc / PLC) or LLC (depending on jurisdiction requirements).

- Why:
  - Large contracts often require strong financial credibility and limited liability structures.
  - Corporations are better positioned for bonding, insurance, and compliance with government requirements.
- Risks/benefits: More regulation and higher setup costs, but credibility and liability protection outweigh downsides.

### TIPS FOR TRAINERS

Encourage young entrepreneurs to freely and respectfully share their ideas.

Encourage participation and active involvement.

Be open to feedback and improvements.

Adapt legal statuses/scenarios according to the needs and or your country or check if the given ones correspond to the local requirements.

### INTERACTIVE LEARNING SEGMENT

You can reinforce learning by integrating a final quiz by using online tools as online quiz tool such as Kahoot or Mentimeter.

## ASSESSMENT

Completeness, coherence, and presentation of young entrepreneurs' conclusions on the best legal status for the given scenario, as well as their ability to explain and justify their choices.

## REFERENCES

- Inez Vermeulen. A Guide to Setting Up Legal Entities in Europe. <https://europe-hr-solutions.com/resources/a-guide-to-setting-up-legal-entities-in-europe/>
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Total Time:

**6** hours

**Digital  
Marketing**

**Learning Unit 4**  
**The Basics of  
Marketing**

# Learning Unit 4: The Basics of Marketing

## Definition/What is about?

Marketing is the key of any successful business, as it connects products and services with the needs and desires of customers. This unit introduces the fundamentals of marketing, focusing on the structure of a commercial offer, the principles of a strong marketing strategy, persuasive sales techniques, and the creation of an effective sales action plan. Understanding these elements is essential for trainers who aim to develop entrepreneurial skills, as it equips learners with the ability to identify market opportunities, communicate value effectively, and drive sales. In today's competitive and rapidly changing environment, mastering the basics of marketing empowers entrepreneurs to position their offers strategically, build lasting customer relationships, and remain adaptable in an uncertain labour market.

## Learning Objective / What can I learn?

By the end of this unit, trainers will be able to:

- Define a commercial offering
- Define a marketing strategy
- Build a sales argument
- Draw up a sales action plan

## Introduction / What is included?

This chapter provides a concise overview of the core elements of marketing, designed to help trainers equip learners with practical and adaptable business skills. It covers the components and structure of a commercial offer, the key concepts that underpin an effective marketing strategy, and persuasive techniques for building strong sales arguments. In addition, it explains the purpose and essential components of a sales action plan, enabling learners to translate strategy into concrete steps.

## Theoretical approach

Dr. Philip Kotler, known as the father of marketing, defines marketing as “the science and art of exploring, creating, and delivering value to satisfy the needs of a target market at a profit. Marketing identifies unfulfilled needs and desires. It defines, measures and quantifies the size of the identified market and the profit potential. It pinpoints which segments the company is capable of serving best and it designs and promotes the appropriate products and services.”<sup>1</sup>

According to Kotler (1988), marketing is a societal and managerial process in which individuals and organizations fulfill their needs and wants by creating and exchanging value with others.

Therefore, value means the benefits a customer receives from a product or service compared to the cost or effort they invest to get it. Moreover, creating value means designing a commercial offering that truly meets or exceeds customer needs and expectations. As a result, a commercial offer can be defined as a formal proposal made by a seller or service provider to a potential buyer, outlining the terms and

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<sup>1</sup> Kotler, P., Keller, K. L., & Chernev, A. (2021). Marketing management: Global edition (16th ed.). Pearson Education Limited.

conditions under which goods or services will be supplied. It typically includes details such as product or service specifications, price, quantity, delivery terms, payment conditions, and validity period. The offer serves as an invitation to enter into a contract and forms the basis for negotiation and agreement between the parties. A commercial offering is tailored to meet specific customer needs or solve particular problems and reflects the company's value proposition — that is, what makes the offer attractive and competitive in the market. It is designed and presented in a way that encourages customers to choose it over alternatives. Finally, it involves strategic decisions regarding product design, pricing, promotion, and distribution. For example, a commercial offering from a smartphone company might include:

- The smartphone itself (product)
- A warranty and after-sales service (service benefits)
- Competitive pricing and payment options (price)
- Availability through retail stores and online platforms (distribution)
- Marketing communications that highlight unique features (promotion)

### What is a Commercial Offer?

A commercial offer is made up of three main components:

#### 1. Product

Product is anything that can be offered to a market to satisfy a want or need, including physical goods, services, experiences, events, persons, places, properties, organizations, information, and ideas". In marketing, a product is generally viewed as a combination of attributes, which can be both tangible and intangible. (Kotler and Keller,2009).

Tangible attributes are the physical or measurable aspects of a product that customers can directly perceive and evaluate. These include the physical and measurable characteristics that customers can see, touch and evaluate such as:

- Physical features: size, shape, weight...
- Quality/Performance: durability, accuracy, strength
- Specifications: technical details and measurable criteria
- Other features such as packaging, branding cues, aesthetics, usability, safety depending on the product type and industry

Intangible attributes are non-physical elements that contribute to the overall value and customer experience. These include:

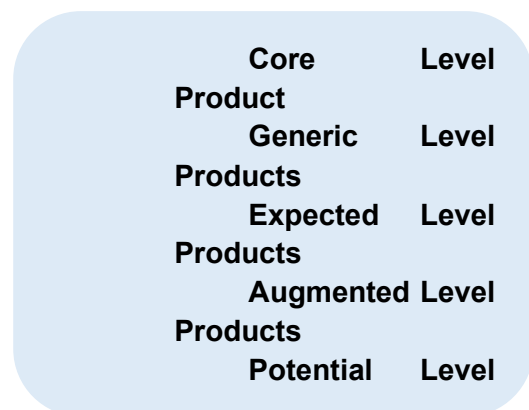
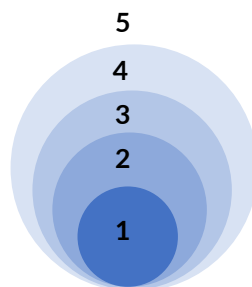
- **Brand Image:** The perceptions and associations customers have with the product's brand.
- **Customer Service:** The support provided before, during, and after the purchase.
- **Warranty and Guarantees:** Promises regarding product performance and quality.
- Emotional and Experiential Benefits: The feelings and experiences customers associate with using the product.
- **Reputation:** The product's standing in the market and among peers.

Every product comprises both tangible attributes — including features, quality, and specifications — and intangible attributes, such as brand image, reputation, and customer experience. In practice, a product should be understood as a combination of these tangible and intangible elements.

- Kotler’s Five Product Levels Model (1967) is a valuable framework for understanding how consumers perceive and derive value from products. By considering all five levels, marketers can design products and services that effectively address the needs and expectations of their target audience.
- **Core Level Product:** The fundamental benefit or need that the product addresses. Explains why the customer is buying.
- **Generic Level Products:** The tangible components and features that deliver the core benefit, such as design, features, packaging, and branding. Represents the standard version of the product that fulfills the need.
- **Expected Level Products:** The set of attributes and conditions that buyers normally expect when they purchase a product. Meets basic customer expectations.
- **Augmented Level Products:** Additional services or benefits that exceed customer expectations and differentiate the product from competitors. Enhances value and creates competitive advantage.
- **Potential Level Products:** All the augmentations and transformations the product might undergo in the future. Represents innovation and long-term value creation.

**Fig1- Five Product Levels- Philip Kotler**

Adapted from [GeeksforGeeks](https://www.geeksforgeeks.org/kotlers-five-product-levels/)



**Example: Nike Air Zoom Pegasus**

1. Core Level Product:

A running shoe that allows you to run comfortably and protect your feet.

2. Generic Level Products:

A running shoe available in different sizes, colors, and designs.

3. Expected Level Products:

A running shoe that is lightweight, cushioned, durable, and provides good traction.

#### 4. Augmented Level Products:

A running shoe that is lightweight, cushioned, durable, provides good traction, and comes with access to the Nike Run Club app for tracking workouts and personalized coaching.

#### 5. Potential Level Products:

A running shoe that adapts to your running style in real-time, tracks biometrics, connects to wearable devices, and offers guided virtual running experiences.

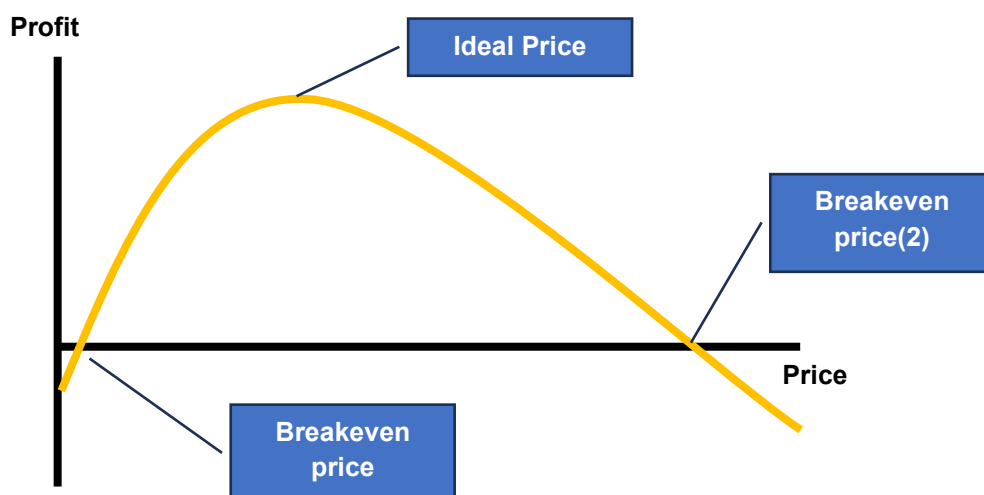
Kotler's Model offers a range of advantages:

- It enables marketers to gain insights into how consumers decide on purchases.
- It guides the development of products and services that align with customer needs and expectations.
- It supports effective market segmentation and targeting strategies.
- It assists in positioning products and services competitively in the marketplace.
- It delivers a structured framework for analysing the customer journey from initial awareness to the final purchase.

## 2. Price

Price is the monetary value assigned to a product or service, reflecting the cost to the customer for acquiring the benefits offered. In a commercial offer, price is not just a number, but a communication of value, positioning, and market competitiveness.

To ensure the commercial success of an offer and the long-term sustainability of the business, it is essential to adopt a pricing strategy that balances customer value, competitive positioning, and company objectives. Increasing the price can initially enhance profitability; however, beyond a certain point, higher prices reduce sales volumes, which in turn diminishes overall profitability.



**Note:** A breakeven price is the price at which a seller neither makes a profit nor incurs a loss on a product or investment. In other words, it's the minimum price needed to cover all costs.

Although to identify the appropriate price range that customers perceive as acceptable, it is necessary to apply a well-defined pricing strategy.

A pricing strategy considers factors such as customer segments, purchasing power, market conditions, competitor behaviour, trade margins, and input costs. It is designed with a specific target audience in mind and positioned relative to competing offers. The main approaches include:

- **Cost-plus pricing:** This strategy is based on all direct and indirect costs linked to producing or delivering the product or service. The selling price is determined by calculating the total cost and then adding a predetermined margin to ensure profitability.

Example:

If the total cost of producing a product is €100 and the desired profit margin is 20%, the selling price would be calculated as:

$$\text{Selling Price} = \text{Cost} + (\text{Cost} \times \text{Profit Margin}) = 100 + (100 \times 0.2) = 120\text{€}.$$

This approach ensures that all costs are covered while securing a consistent profit.

- **Competitive pricing:** This strategy involves constantly adjusting prices to adapt to the competition. When choosing this pricing strategy, you can take one of the following three approaches:
  - **Co-operative pricing:** With this approach, the price of your product or service is aligned with that of your competitors. If a competitor raises their price, you adjust yours upward accordingly; if they lower their price, you reduce yours to match. This strategy helps maintain market parity and stability. A common example of this approach is found in service stations, where fuel prices often mirror those of nearby competitors.
  - **Aggressive pricing:** It is a competitive strategy in which a business sets prices deliberately to challenge competitors and gain market share. Typically, the firm maintains lower prices than competitors or reduces prices more sharply when competitors decrease theirs, aiming to create a significant competitive advantage. This strategy signals to rivals that maintaining price leadership against the firm may be costly.

Aggressive pricing is most effective for businesses that have sufficient profit margins to absorb short-term reductions in price while pursuing market share growth. However, it carries financial risks if sales volumes decline, and it requires careful management to avoid eroding profitability over time

- **Dismissive pricing:** It is a strategy typically employed by market leaders offering high-end products or services. Under this approach, the business sets prices independently of competitors, focusing instead on the value perceived by its customers. By disregarding competitors' pricing, the firm may reinforce its market positioning and increase differentiation.

This strategy is effective when the business has a deep understanding of its customers, ensures that prices reflect the intrinsic value of the product or service, and relies on accurate market information. However, dismissive pricing carries the risk of overconfidence; ignoring competitive actions may leave the firm vulnerable to unexpected market shifts.

**Price skimming:** A strategy used when launching innovative or unique products with little or no competition. The business initially sets a high price to target early adopters, capturing maximum value from customers willing to pay a premium and recovering development costs. Over time, as the market becomes more saturated or early adopters are exhausted, the price is gradually lowered to attract more price-sensitive segments. This approach relies on the assumption that the product will maintain sufficient

demand to support initial high prices. Key risks include the challenge of convincing early adopters of the product's value, potential entry of competitors offering similar products at lower prices, and limitations on applying the strategy to follow-up products that have already reached the early adopter market.

- **Penetration pricing:** A strategy applied in markets with numerous similar products or services, particularly when customers are highly price-sensitive. The business sets an initially low price to quickly attract a large customer base, encourage brand switching, and stimulate demand. Increased sales volume can lead to economies of scale, reducing the cost per unit and potentially establishing a market or technology standard.

This approach is strategically used to gain rapid market share, as seen in industries like video game consoles, where companies such as Nintendo, PlayStation, and Xbox offer consoles at lower prices to drive adoption, while generating profits from complementary products such as games.

- **Value-based pricing:** A strategy in which prices are determined primarily by the perceived value of a product or service to the customer, rather than solely by costs or competitive prices. The approach focuses on aligning the price with the benefits and differentiation that the customer recognizes, thereby enhancing profitability and supporting business growth.

Price is both an economic and a psychological variable. It communicates product positioning, quality expectations, and brand image. Customers often use price as a proxy for quality, especially when other information is limited (Kotler & Keller, 2016). A very low price may raise doubts about the quality, durability, or legitimacy of the product. Customers may associate “cheap” with “low value.” Conversely, a higher price can act as an indicator of superior quality, exclusivity, or prestige. This is particularly relevant in markets for luxury goods or high-involvement purchases (e.g., cars, watches, or professional services). The pricing strategies discussed above underscore the central role of price in determining market accessibility. When a price is perceived as disproportionately high in relation to consumers' income levels or to competitive alternatives, demand is likely to decline, thereby restricting access to wider market segments (Zeithaml, 1988; Kotler & Keller, 2016). To mitigate this risk, firms employ structured pricing strategies that allow them to align price with both the core features of the offering and the expectations of the target market. By doing so, businesses can enhance perceived value, improve market fit, and increase the likelihood of commercial success (Monroe, 2003; Nagle, Hogan & Zale, 2016).

### 3. Service

Service refers to all complementary and supporting elements that accompany a product or solution, aimed at ensuring its proper functioning, facilitating its use, and enhancing the overall customer experience. In marketing theory, services are often considered an integral part of the augmented product (Kotler & Keller, 2016), as they provide additional value that goes beyond the core features of the tangible or intangible offering.

The role of service in a commercial offer is twofold: (1) it acts as a differentiator in competitive markets where product features and prices may be similar, and (2) it sustains long-term customer satisfaction and loyalty by ensuring continuous value delivery (Parasuraman, Zeithaml & Berry, 1988). High-quality service can significantly influence customer perceptions of value, reduce post-purchase risk, and encourage repeat business.

Services may include a variety of dimensions depending on the nature of the offer:

- **Logistics and Delivery:** Ensuring timely and reliable delivery of products to the customer. It refers to the processes and activities involved in moving a product from the producer or supplier to the end consumer, ensuring that it is available at the right time, in the right place and in the right condition (Christopher, 2016).

- **Installation and Training:** Assisting clients in the initial implementation of the product and providing knowledge for its effective use. Installation and training refer to the set of activities designed to ensure that customers can successfully implement and use a product or service to its full potential. It includes the technical support and setup of a product.
- **Customer Support and After-Sales Service:** Offering help desks, technical assistance, or repair and maintenance services to guarantee continuous functionality. It encompasses all activities that assist customers after the purchase of a product or service. This includes technical assistance, troubleshooting, maintenance, and problem resolution. Effective support ensures that customers continue to derive value from the product over time, reducing frustration and enhancing user experience. Customers who receive timely and effective support are more likely to become repeat buyers and recommend the brand to others. Prompt assistance reduces perceived risk and builds trust, especially for complex or high-value products (Parasuraman, Zeithaml & Berry, 1988).
- **Warranties and Guarantees:** They are formal promises regarding product performance, quality, or durability, provided by the seller to the buyer. By assuring customers that defects or failures will be addressed, warranties reduce perceived purchase risk. Guarantees signal reliability and commitment to quality, reinforcing the brand's reputation. Strong warranty policies can be a competitive advantage in markets with similar product features and pricing. However, in most jurisdictions, warranties and guarantees are not purely optional; businesses are often legally required to comply with minimum standards. In the European Union, consumers have a legal right to a 2-year minimum warranty on all goods (Directive 1999/44/EC). Then, businesses can decide whether to augment these with additional guarantees as part of the value proposition.
- **Customization and Consulting:** Tailoring the offer to meet specific customer requirements or providing expert guidance to optimize outcomes. Developing personalized solutions align the offering more closely with customer objectives, increasing satisfaction and loyalty. Customization helps to differentiate the offer as it allows the business to stand out in markets where standard products may be commoditized.

In contemporary markets, where product features may quickly be imitated and prices are subject to competitive pressure, service increasingly becomes the critical differentiator (Grönroos, 1997). The quality of accompanying services shapes customer satisfaction and loyalty, which in turn affects long-term profitability (Zeithaml, Berry & Parasuraman, 1996). Thus, service should be regarded not merely as an add-on but as a strategic component of the commercial offer that enhances perceived value, reduces customer churn, and strengthens competitive positioning.

Service should not be viewed as an add-on or secondary element in a commercial offer. Rather, it forms a core part of the overall value proposition. According to Kotler and Keller (2016), services are a key element of the augmented product, enhancing the tangible or intangible offering by ensuring usability, satisfaction, and long-term utility. Neglecting service components can reduce the effectiveness of an otherwise strong product or competitive pricing strategy.

Commercial offers can take different forms depending on the business model and the client's needs:

- **Standardized offers:** These are fixed packages with the same terms, prices, and conditions for all customers. They are common in industries with high volumes and low customization, such as telecommunications or subscription services.
- **Customized offers:** These are tailored to the specific requirements of an individual client, often after a needs analysis or negotiation. They are typical in B2B markets, consulting services, or large-scale equipment sales.

## Marketing strategies

Marketing strategies have evolved from mass marketing to more differentiated and customized approaches, with an emphasis on tailoring offers to specific segments or individual customers to increase satisfaction and loyalty by better addressing their needs (Kotler and Keller, 2016). Customization can involve modifying product features, pricing structures, delivery terms, or after-sales services, reflecting the dynamic nature of customer demands. In contrast, mass marketing creates a single, standardized product aimed at a broad audience to maximize efficiency and reach, but it may not meet the specific needs of individual customers or segments. A good commercial offering is adaptable and its flexibility ensures that the offer continues to meet client expectations and supports long-term customer relationships.

A marketing strategy is the approach a company uses to deliver value to customers while building profitable relationships. It involves deciding which customers to focus on and how to meet their needs effectively. The process typically includes four key steps:

1. **Market segmentation:** Breaking the market into distinct groups of consumers who share similar needs, characteristics, or behaviours, and who may require tailored products or marketing approaches. A market segment is a set of customers that respond in comparable ways to specific marketing actions.
2. **Market targeting** is assessing the potential of each segment and choosing one or more to focus on, based on attractiveness and alignment with the company's capabilities.
3. **Positioning** is designing the product or service to occupy a unique and desirable place in the minds of the target customers compared to competing offerings.
4. **Differentiation** is actually shaping the product, service, or overall market offering to provide superior value and stand out from competitors.

The commercial offering is the result of the marketing mix often represented by the 4Ps (Product, Price, Place, Promotion) framework put into action. McCarthy<sup>2</sup> described the marketing mix as a set of controllable variables that a company can manage to satisfy customers and achieve its objectives. These variables are:

- **Product:** What you offer to meet customer needs — goods, services, ideas.
- **Price:** How much the customer pays — includes discounts, payment terms.
- **Place:** Where and how the product is distributed and sold.
- **Promotion:** All the activities to communicate and persuade customers

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<sup>2</sup> McCarthy, E. J. (1960). Basic marketing: A managerial approach. Homewood, IL: Richard D. Irwin



**Figure SEQ Figure \\* ARABIC 1 4Ps of Marketing Mix Diagram**

While the original 4 Ps remain central, modern adaptations like the 5 Ps (adding people), 7 Ps (adding process and physical evidence), and the 4 Cs (consumer, cost, convenience, communication) have evolved to address the complexities of today's customer-centric and digital marketplace.

Managing marketing effectively involves four key functions.

The first is marketing analysis, which often begins with a SWOT assessment. This evaluates a company's strengths (internal capabilities), weaknesses (internal limitations), opportunities (external factors that could be advantageous), and threats (external factors that could pose challenges). In addition, this process may also involve to detail and profile the competitive strengths and weaknesses of each competitor in the market.



Figure SEQ Figure \\* ARABIC 2  
Source: [Wikipedia](#)

Internal factors may include<sup>3</sup>:

- Human resources—staff, volunteers, board members, stakeholders
- Physical resources—location, building, equipment, plant
- Financial—revenue, grants, investments, other sources of income
- Activities and processes—projects, programs, systems
- Past experiences—reputation, knowledge

External factors may include<sup>3</sup>:

- Future trends in the organization's field or society at large (e.g. macroeconomics, technological change)
- The economy—local, national, or international
- Funding sources—investors, foundations, donors, legislatures
- Demographics—changes in the age, race, gender, culture of those in the organization serviceable area
- Physical environment—growth of location in which organisation is situated, access to location
- Legislation
- Local, national, or international events

The second function is marketing planning, where appropriate strategies are selected to achieve business goals. Third is marketing implementation, which involves putting these strategies and plans into action to reach marketing objectives. The fourth function, marketing control, focuses on assessing the results of marketing efforts and making adjustments as needed. Operational control tracks performance against annual plans, while strategic control ensures that chosen strategies remain aligned with market opportunities.

Today, marketers are expected to justify expenditures with measurable outcomes. Marketing ROI (return on marketing investment) calculates the net returns generated by marketing activities relative to their

<sup>3</sup> Berkowitz, B. (n.d.). Section 14. SWOT analysis: Strengths, weaknesses, opportunities, and threats. Community Tool Box. University of Kansas. from <https://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/swot-analysis/main>

costs. While marketing ROI provides insights into the effectiveness of marketing investments, accurately measuring it can be challenging.

### Persuasive Techniques used in constructed sales arguments

Persuasion is a symbolic process in which communicators try to convince other people to change their attitudes or behaviour regarding an issue through the transmission of a message in an atmosphere of free choice. (Perloff,2003). Persuasive techniques in sales are the deliberate strategies and methods employed by salepeople to influence potential customers' attitudes, emotions, and decision-making processes in order to encourage them to purchase a product or service.

They draw on principles from communication, psychology, and marketing—such as appeals to needs, credibility, emotion, logic, scarcity, and social proof—to make a sales argument more compelling.

#### 1. Appeal to needs

Persuasion in sales often works best when it appeals directly to a customer's hierarchy of needs, as outlined by psychologist Abraham Maslow (1943). Maslow's theory explains that people are motivated by different levels of needs, beginning with the most basic physiological and safety requirements, and advancing toward psychological needs and ultimately self-actualization. In sales arguments, this framework provides a roadmap for tailoring messages that align with customers' underlying motivations. By matching the product or service to the customer's stage of need, the salesperson creates relevance and strengthens the persuasive impact.

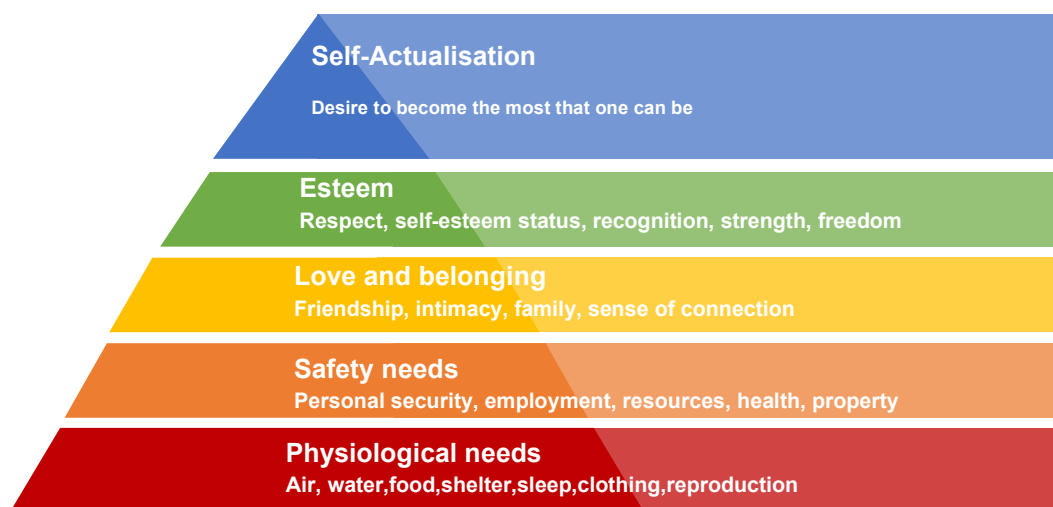


Figure SEQ Figure \\* ARABIC 3 Maslow's Hierarchy of Needs

#### a) Basic Needs (Physiological & Safety Needs)

These needs form the foundation of the hierarchy and are linked to survival, security, and stability. In sales, customers motivated at this level prioritize practicality, affordability, and protection over luxury or prestige.

#### Sales Strategy:

Focus on demonstrating how the product ensures safety, reliability, and cost-effectiveness. Emphasize durability, risk reduction, and long-term savings.

**Example Arguments:**

“This insurance guarantees your family’s financial security, giving you peace of mind even in unexpected circumstances.”

“Our energy-efficient refrigerator not only preserves your food safely but also lowers monthly electricity bills, helping you save money in the long run.”

“This car is equipped with cutting-edge safety features, ensuring maximum protection for your loved ones on every journey.”

Meeting these fundamental needs helps sales arguments overcome hesitation by appealing to universal priorities of safety and affordability

**b) Psychological Needs (Belonging & Esteem Needs)**

Once basic needs are secured, customers are often motivated by the desire for connection, recognition, and self-esteem. Here, purchasing decisions are shaped by identity, social belonging, and the pursuit of respect from others.

**Sales Strategy:**

Stress the role of the product in enhancing social status, boosting confidence, and fostering a sense of community. Position the product as not only useful but also as a reflection of the buyer’s identity and values.

**Example Arguments:**

“Wearing this brand signals professionalism and confidence, helping you stand out in competitive environments.”

“Join over 10,000 members who already trust our platform and become part of a growing community of achievers.”

“This premium watch is more than a timepiece—it’s a symbol of success, respect, and refined taste.”

At this stage, persuasion taps into emotional triggers and social validation, making buyers feel that their purchase elevates their status or connects them to something larger than themselves

**c) Self-Actualisation Needs**

At the peak of the hierarchy, customers are motivated by personal growth, creativity, and the pursuit of meaning. Purchases are not just about utility or image, but about achieving aspirations and realizing one’s full potential.

**Sales Strategy:**

Inspire customers by framing the product as a pathway to transformation, self-expression, and purpose. Highlight the ways it helps them achieve goals, innovate, or leave a lasting impact.

### **Example Arguments:**

“This online course equips you with the skills to unlock your full potential and achieve the career you’ve always dreamed of.”

“Our travel packages aren’t just holidays—they are transformative journeys that enrich your perspective and broaden your horizons.”

“With this creative tool, you can design, innovate, and make a lasting contribution to your field.”

Persuasion at this level is aspirational: it positions the product as a vehicle for self-fulfilment and meaningful life experiences, which can create strong emotional bonds with the brand

## **2. Ethos, Pathos, Logos**

The classical modes of persuasion, first identified by Aristotle in *Rhetoric*, a collection of his student’s notes from his lectures that later became a book, remain central to sales communication today. They explain how messages persuade by appealing to credibility (ethos), emotions (pathos), and logic (logos). Effective sales arguments often combine all three, but depending on the customer and context, one appeal may dominate.

### **a) Ethos (authority, credibility, reliability)**

Customers are more likely to trust and buy from a source that appears credible, competent, and ethical. Ethos is built by demonstrating expertise, reliability, and integrity.

#### **Sales Strategy:**

Use endorsements, professional qualifications, case studies, or brand reputation to reassure the customer that they are making a trustworthy choice.

#### **Example Arguments:**

- “Our company has over 30 years of industry experience and is trusted by leading global brands.”
- “This skincare product is dermatologist-recommended and clinically tested.”
- “Here are testimonials from clients who achieved real results using our service.”

Through the establishment of credibility, sales messages diminish customer scepticism and enhance trust, resulting in greater confidence in the purchasing decision

### **b) Pathos (emotion, sympathy, imagination)**

Pathos appeals to feelings, values, and desires. In sales, emotion can spark urgency, create connection, or inspire aspiration. Stories, vivid imagery, and empathetic language are powerful tools here.

#### **Sales Strategy:**

Use storytelling, emotional triggers, and scenarios that resonate with the customer’s hopes, fears, or values. Create urgency through appeals to loss, pride, or belonging.

### Example Arguments:

- “Imagine the peace of mind you’ll feel knowing your family is protected no matter what happens.”
- “Don’t miss out—your dream holiday is waiting for you, but spots are filling fast.”
- “This gift isn’t just jewellery—it’s a symbol of love that your partner will treasure forever.”

Emotional engagement in sales communication encourages behaviour that extends beyond rational evaluation, creating a perception of personal significance and immediacy

### c) Logos (logic, rationality, reason)

Logos appeals to reason through facts, evidence, and clear explanations of value. Customers motivated by logic want reassurance that their decision is sensible and well-informed.

### Sales Strategy:

Provide statistics, comparisons, demonstrations, or cost–benefit analyses. Highlight efficiency, durability, and measurable results.

### Example Arguments:

- “This laptop delivers 40% faster performance than its competitors, saving you hours each week.”
- “With a five-year warranty, this option gives you long-term reliability at a lower overall cost.”
- “Studies show that our solution reduces energy usage by up to 25% annually.”

Through the presentation of logical evidence, sales messages engage rational decision-making processes and lessen the perceived uncertainty of purchase

In sales communication, the integration of ethos, pathos, and logos creates a powerful and well-rounded persuasive appeal. Each element targets a different aspect of customer motivation—ethos builds trust and authority, pathos engages emotions and personal values, and logos provides logical justification for the purchase. When used together, these appeals ensure that the message resonates with both the heart and the mind, encouraging confident decision-making. Overreliance on just one dimension can weaken persuasion; for instance, emotional appeals without supporting facts may appear manipulative or insincere, while logic presented without credibility or empathy can seem cold and unrelatable. The most effective sales arguments therefore balance credibility, emotion, and reason to create a message that feels trustworthy, meaningful, and convincing to diverse audiences.

## 3. Other relevant techniques

### a) Scarcity and urgency

The principle of scarcity is based on the idea that people assign higher value to opportunities or products that appear limited or time-sensitive. When something is scarce, customers fear missing out, which creates urgency and motivates quicker decision-making. This technique relies on the psychological concept known as loss aversion—the tendency for people to prefer avoiding losses rather than acquiring equivalent gains.

### **Sales Strategy:**

Emphasize limited availability, exclusive offers, or deadlines to encourage immediate action. Use language that conveys time sensitivity (“today only,” “limited stock”) or exclusivity (“for members only,” “exclusive release”). The key is to create urgency ethically—without deception—so customers feel motivated but not misled.

### **Example Arguments:**

- “Only a few seats left for this weekend’s workshop—reserve yours now before they’re gone.”
- “This special discount expires at midnight—don’t miss your chance to save 30%.”
- “This limited-edition item is available exclusively to our early subscribers.”

Emphasizing scarcity and urgency activates a fear of missing out, encouraging quicker purchasing decisions by creating a sense of exclusivity and time sensitivity

### **b) Social Proof**

Social proof refers to the human tendency to look to others for cues on how to behave, especially in uncertain situations. In sales, it means that customers are more likely to trust and purchase products that others have already endorsed or bought. Testimonials, reviews, ratings, and case studies all act as validation, building confidence in the buyer’s decision.

### **Sales Strategy:**

Use evidence of customer satisfaction—such as testimonials, success stories, or user statistics—to demonstrate widespread approval. Highlight recognizable clients, endorsements from influencers, or high review scores to reinforce trust and credibility.

### **Example Arguments:**

- “Join over 20,000 satisfied customers who have transformed their workflow with our software.”
- “Rated 4.9 out of 5 stars by professionals worldwide.”
- “See how companies like Nike and Google use our platform to streamline their operations.”

Demonstrating social approval through others’ experiences reduces perceived risk and enhances credibility, reinforcing the customer’s confidence in their purchasing decision

### **c) Authority**

The authority principle is rooted in the psychological finding that people tend to follow or trust figures who appear knowledgeable, credible, or experienced. In sales, establishing authority means positioning the product or company as an expert or leader in its field. This increases customer confidence, as buyers are more inclined to accept advice or recommendations from perceived experts.

### **Sales Strategy:**

Build authority by referencing credentials, awards, certifications, or expert endorsements. Use authoritative language and professional presentation to project confidence. Highlight partnerships with reputable organizations or compliance with recognized standards.

### Example Arguments:

- “Our skincare line is developed in collaboration with leading dermatologists and backed by clinical studies.”
- “As an ISO-certified manufacturer with over 25 years in the industry, we guarantee top-tier quality.”
- “Endorsed by financial experts as one of the most reliable investment platforms of 2025.”

When sales messages convey genuine expertise and trustworthiness, they boost customer confidence and reinforce the brand’s role as a reliable authority.

## Create a Sales Plan

A sales plan is a structured roadmap that outlines the steps, strategies, and resources needed to achieve specific sales objectives within a set timeframe. It turns sales goals into measurable actions—defining who does what, when, and how. This plan helps sales professionals stay focused, track progress, and align daily activities with broader business targets.

### 1. What are the goals of an effective sales plan ?

The main goals of an effective sales plan are:

- To communicate company goals and objectives
- To provide strategic direction
- To outline roles and responsibilities
- To monitor the sales team’s progress

**Communicate your company’s goals and objectives:** Goals and objectives are the foundation of any successful sales effort. Without them, it’s impossible to know what you are working toward or to measure meaningful progress.

Sales representatives need a clear understanding of what is expected. Simply telling a team to “sell” is not enough; it’s essential to establish benchmarks that are clear, practical, and ambitious.

As goals evolve—which they inevitably will—it’s important to communicate these changes consistently, along with any strategic adjustments, so the team stays aligned and focused.

**Provide strategic direction:** Your sales strategy is what keeps your sales process effective and productive. It provides actionable steps that your team can follow to achieve your vision and reach the goals you’ve set. Communicating this strategy clearly is essential, and a well-structured sales plan serves as a key resource for doing so.

**Outline roles and responsibilities:** An effective sales organization operates like a well-oiled machine, where every component has a distinct function that must be performed in a precise manner. Each team member needs a clear understanding of how their role contributes to the company’s broader sales strategy.

Defining roles and responsibilities during the sales planning process promotes efficient task delegation, reduces overlap, and increases accountability. Together, these factors lead to smoother operations and more successful sales outcomes.

**Monitor your team’s progress:** Sales planning provides the framework for measuring how effectively your team executes your sales strategy. It establishes the benchmarks and milestones that help reps evaluate their performance against defined goals and expectations.

Additionally, it gives sales leadership a comprehensive view of the organization's overall performance, offering the perspective needed to determine whether the team has the right people, processes, and tools to succeed.

## **2. Sales planning process**

### **STEP 1: Define your Sales Goals**

Set goals using SMART (Specific, Measurable, Achievable, Relevant, Time-bound)

### **STEP 2: Identify your target Market**

Determine who your ideal customers are—consider demographics, needs, and buying behaviours.

Analyse your offerings, conduct market research, use market segmentation and assess the competition in your market.

### **STEP 3: Analyse customer Needs**

Use insights from previous sales or customer feedback to understand key pain points. Collect sales data and search for trends in your industry.

### **STEP 4: Assess the Competition**

Evaluate competitors' offerings, strengths, and weaknesses to identify opportunities.

### **STEP 5: Define Sales Strategies and Tactics**

Determine which persuasive techniques, channels, and messaging will be used to reach targets

### **STEP 6: Assign Roles and Responsibilities**

Clarify which team members handle specific tasks to ensure accountability and efficiency.

### **STEP 7: Develop an Outreach plan**

Create a schedule for contacting leads and following up (calls, emails, meetings, events).

### **STEP 8: Plan Awareness and Branding Activities**

Build visibility through personal branding, social media, networking, or marketing campaigns.

### **STEP 9: Set Metrics and KPIs**

Define how success will be measured (e.g., conversion rates, number of demos, revenue growth).

### **STEP 10: Monitor, Review, and Adjust**

Track progress regularly, analyse results, and adjust strategies as needed.

## **3. Simplified Sales Action Plan Template**

Use this Sales Action Plan template as a structured guide to organize your objectives, target customers, outreach activities, and performance tracking

## SALES ACTION PLAN<sup>4</sup>

FOR: \_\_\_\_\_

### Establish your Objective

*What is the primary goal of your business you want to achieve? Use the **SMART** method*

### Identify Top Customer Segments

*List your top 5 customer segments you want to grow relationships with. Targeting the most profitable or promising segments ensures that your efforts generate maximum ROI.*

- 1.
- 2.
- 3.
- 4.
- 5.

### Identify Top Prospects

*List your top 5 prospects to increase market share, focusing on untapped opportunities or niches in your community. Prioritizing prospects helps you allocate resources effectively and avoid chasing low-value leads. Look for industries similar to your current top customers or emerging markets with growth potential.*

- 1.
- 2.
- 3.
- 4.
- 5.

### Define Key Employees and Roles

*Identify team members who will support your sales efforts and clarify their responsibilities. Clear roles reduce overlap, increase accountability, and ensure smooth execution.*

- 1.
- 2.
- 3.
- 4.
- 5.

<sup>4</sup> Adapted from CreativeTemplate.net. (2016, October). Sales plan template. CreativeTemplate.net. <https://images.creativetemplate.net/wp-content/uploads/2016/10/sales-plan-template-doc.pdf>

### Create Your Outreach Plan

*Develop a weekly plan for reaching out to customers and prospects through calls, emails, visits, or direct mail. Schedule daily tasks for calls, emails, or face-to-face visits and track follow-ups.*

	WEEK 1	WEEK 2	WEEK 3	WEEK 4
MONDAY				
TUESDAY				
WEDNESDAY				
THURSDAY				
FRIDAY				
WEEKEND				

Will you

Call them?	See them?
Mail them?	E-mail them?

### Outreach and Awareness

*List ways to get your message out so people know who you are and what you offer. Include online tools, direct mail, email campaigns, and social media. Maintain consistent messaging across all channels for a professional and trustworthy presence.*

- 1.
- 2.
- 3.
- 4.
- 5.

### Develop Your Personal Brand

*Identify five actions to strengthen your personal credibility and visibility. A strong personal brand builds trust, differentiates you from competitors, and attracts customers. Examples include LinkedIn updates, professional articles, speaking at events, or sharing success stories.*

- 1.
- 2.
- 3.
- 4.

5.

**Networking Plan**

*Outline activities to increase “face time” with customers and prospects monthly. Networking creates opportunities, strengthens relationships, and uncovers new business. Attend local events, join industry groups, or organize customer appreciation meetings.*

1.

2.

3.

4.

5.

**Educate Yourself**

*Dedicate time weekly to improve knowledge through books, industry journals, podcasts, webinars, or training seminars. Continuous learning keeps you competitive and better equipped to solve customer problems.*

1.

2.

3.

4.

5.

**Review and Adjust**

*Regularly evaluate your sales plan and make adjustments based on results, market changes, or feedback. Conduct monthly reviews, track KPIs, and refine your actions to improve outcomes.*

1.

2.

3.

4.

5.

**Engagement**

*Identify methods to maintain focus and enthusiasm, such as reward systems, mentorship, or personal goals. Motivation drives persistence and resilience, especially in challenging sales periods. Celebrate small wins, set personal milestones, and seek peer support to maintain momentum.*

1.

2.

3.

4.

5.

**Notes**

## Practical Action Points/ Can I have some tips?

1. Define your commercial offering clearly: Write down what problem you solve, for whom, and what makes your product or service unique.
2. Segment your market: Identify 2–3 customer groups with distinct needs and tailor your approach to them.
3. Position your product effectively: Craft a short value proposition statement that highlights why customers should choose you over competitors.
4. Build a sales argument: Use evidence (testimonials, case studies, statistics) to make your offer more persuasive.
5. Draw up a sales action plan: Set clear goals, assign responsibilities, and define timelines for marketing and sales activities.
6. Use digital tools: Leverage social media, e-commerce platforms, and email campaigns to reach audiences cost-effectively.
7. Track results and adapt: Monitor your marketing ROI regularly and adjust strategies when needed

## Evaluating success /Let's evaluate what I learnt!

### Activity 1

#### Multiple Choice Questionnaire (1 correct answer each)

1. According to Kotler, what is the main goal of marketing?

- A. To explore, create, and deliver value that satisfies customer needs profitably
- B. To reduce production costs
- C. To advertise products through mass media
- D. To focus only on sales growth

**2. What are the three main components of a commercial offer?**

A. Price, Distribution, Communication

B. Product, Service, Promotion

**C. Product, Price, Service**

D. Product, People, Process

**3. What does “value-based pricing” primarily depend on?**

A. Competitors’ price levels

**B. The perceived value by the customer**

C. The company’s production costs

D. Government regulations

**4. Which persuasive appeal focuses on logic and evidence in sales communication?**

A. Ethos

B. Pathos

**C. Logos**

D. Mythos

**5. In a sales action plan, what is the main purpose of assigning roles and responsibilities?**

A. To increase competition between salespeople

**B. To clarify accountability and improve efficiency**

C. To replace management control

D. To reduce the need for monitoring

**Activity 2**

**True or False**

**1. Marketing is only about promoting and selling products. (T/F)**

**False** — It also involves understanding needs, creating value, and building customer relationships.

**2. A commercial offering includes both tangible and intangible attributes. (T/F)**

**True** — Tangible (features, quality) and intangible (brand, reputation, service) aspects form the total product.

**3. The pricing strategy known as “penetration pricing” involves setting a high initial price to recover costs quickly. (T/F)**

**False** — That describes price skimming; penetration pricing uses a low initial price to gain market share.

**4. Customer service is a key differentiator that enhances perceived value and loyalty. (T/F)**

**True** — Service quality sustains satisfaction and repeat business.

**5. In persuasive communication, relying only on emotional appeal (pathos) is the most effective strategy. (T/F)**

**False** — The most effective sales arguments balance ethos, pathos, and logos.

### Reflection

1. How can cultural differences shape the way a marketing strategy is received in different countries?
2. In what ways can small entrepreneurs compete with larger players by being more creative and agile in their marketing approaches?
3. How can an entrepreneur balance standardization (one global message) with customization (local adaptation) in cross-border marketing?

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## Tool n°1: Design Your Own Commercial Offer.

### AIM

To help learners understand and apply the three main components of a commercial offer — Product, Price, and Service — by designing one for a real or fictional business idea.

### LEARNING OUTCOMES

By the end of this activity, learners will be able to:

- Identify tangible and intangible product attributes.
- Select an appropriate pricing strategy.
- Define supporting services to enhance customer value.
- Integrate these elements into a coherent commercial offer.

### DURATION

45-60 minutes.

### MATERIALS

- Commercial Offer Template
- Pen/paper or digital device
- **Optional:** Internet access for quick research

### METHODOLOGY

Individual or small-group work, followed by presentation and peer feedback.

### PROCESS

1. Introduce the three main components of a commercial offer.
2. Learners select or invent a business idea.
3. They complete the Learner Template for their commercial offer.
4. Learners present their offer to the class or small groups.
5. Peers and trainer provide constructive feedback on clarity, coherence, and value proposition.

### TIPS FOR TRAINERS

- Encourage learners to think like a customer: Ask them “Would you buy this product/service? Why?”
- Facilitate discussion on how product, price, and service interact to create value.
- Offer examples of well-known brands to show real-world applications.
- Prompt learners to justify choices logically (e.g., “Why this price? Why this service?”).
- During presentations, guide learners to give positive, constructive peer feedback emphasizing clarity and persuasiveness.
- Encourage creativity and innovation, reminding learners that hypothetical scenarios are welcome

## ASSESSMENT

- Completeness of template (all sections filled)
- Logical coherence between product, price, and service
- Ability to justify marketing choices
- Creativity and feasibility of the commercial offer.

## REFERENCES

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## ANNEX

### Template: Commercial Offer

Section	Action Steps
Business/Product Name	<i>What is your product/service?</i>
Target Customer	<i>Who is your ideal customer?</i>
Product-Tangible Attributes	<i>List physical features, specifications, and quality.</i>
Product Intangible Attributes	<i>List brand, reputation, emotional/experiential benefits.</i>
Price Strategy	<i>Which pricing strategy will you use? Why?</i>
Service Support	<i>What services or guarantees accompany the product?</i>
Unique Selling Proposition	<i>What makes your offer stand out from competitors?</i>
Coherence Check	<i>How do Product, Price, and Service support each other?</i>

## Tool n°2: Build a persuasive Sales Argument.

### AIM

To help learners construct a structured and persuasive sales argument using recognized persuasive techniques and marketing principles.

### LEARNING OUTCOMES

By the end of this activity, learners will be able to:

- Identify target customer needs and motivations.
- Apply persuasive techniques such as ethos, pathos, and logos.
- Incorporate psychological triggers (scarcity, social proof, authority) in their sales pitch.
- Create a coherent and convincing sales argument tailored to their commercial offer.

### DURATION

45-60 minutes.

### MATERIALS

- Persuasive Sales Argument Template
- Pen/paper or digital device
- Optional: Previous Tool 1 – Commercial Offer

### METHODOLOGY

Individual or small-group work, followed by peer or trainer feedback.

### PROCESS

1. Introduce the three classical modes of persuasion (ethos, pathos, logos) and additional techniques (scarcity, social proof, authority).
2. Learners review their commercial offer from Tool 1 or create a new product/service for the exercise.
3. Learners complete the Persuasive Sales Argument Template, identifying their target audience, main selling points, and techniques.
4. Learners present their arguments in class or small groups.
5. Trainer and peers provide constructive feedback on clarity, persuasiveness, and alignment with customer needs.

### TIPS FOR TRAINERS

- Encourage learners to focus on the customer's perspective, not just the product.
- Guide learners to justify each persuasive element with evidence or examples.
- Use real-world examples to illustrate effective sales arguments.
- Encourage peer discussion and feedback to improve communication skills.
- Highlight ethical considerations in using persuasive techniques, avoiding manipulation.

### ASSESSMENT

- Completeness of the template

- Appropriateness and integration of persuasive techniques
- Clarity, logic, and persuasiveness of the argument
- Creativity and customer-focus of the pitch.

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## ANNEX

### Template: Commercial Offer

Section	Action Steps
Product/Service	<i>What are you selling?</i>
Target Customer	<i>Who are you trying to persuade?</i>
Core Customer Need	<i>What problem does your product/service solve?</i>
Persuasive Technique – Ethos	<i>How will you establish credibility and authority?</i>
Persuasive Technique – Pathos	<i>How will you appeal to emotions?</i>
Persuasive Technique – Logos	<i>How will you use logic and evidence?</i>
Additional Techniques	<i>Scarcity, social proof, or authority?</i>
Sales Message	<i>Write your persuasive argument in 2–3 sentences</i>
Coherence Check	<i>How do your techniques align with the customer’s needs?</i>

## Tool n°3: Marketing Strategy Evaluation Template.

### AIM

To help learners assess the effectiveness, coherence, and alignment of their marketing strategy with business objectives and target audience needs.

### LEARNING OUTCOMES

By completing this tool, learners will be able to:

- Evaluate the alignment of marketing actions with business goals.
- Assess the effectiveness of persuasive techniques and communication strategies.
- Identify gaps or areas for improvement in the marketing plan.
- Make informed adjustments to enhance the commercial offer and sales outcomes.

### DURATION

30-45 minutes.

### MATERIALS

- Learner's commercial offer and sales plan (from Tools 1 & 2)
- Pen/pencil or digital device
- Evaluation checklist

### METHODOLOGY

- Self-assessment and reflection
- Structured evaluation using a checklist.
- Peer or mentor feedback.

### PROCESS

1. Review Marketing Plan: Examine the commercial offer, sales arguments, and marketing action steps.
2. Assess Alignment: Check if all marketing actions support the business goals.
3. Evaluate Persuasive Techniques: Identify which techniques (ethos, pathos, logos, scarcity, social proof, etc.) are used and how effectively.
4. Identify Gaps or Weaknesses: Look for missing elements, inconsistencies, or areas for improvement.
5. Propose Adjustments: Suggest modifications to strengthen the marketing strategy

### TIPS FOR TRAINERS

- Be honest and critical—this is about improving your strategy, not just documenting it.
- Use evidence from market research, previous sales data, or competitor analysis.
- Focus on actionable adjustments rather than vague observations.
- Peer review can provide fresh insights

### ASSESSMENT

- Completeness: All sections evaluated and adjustments proposed.
- Insight: Depth of analysis and understanding of marketing principles.
- Feasibility: Adjustments are realistic and actionable.

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## ANNEX


### Template: Commercial Offer

Marketing Component	Evaluation Notes	Proposed Adjustments	Action Priority (High/Medium/Low)
Target Market Alignment	<i>How well does your strategy address your audience's needs?</i>	<i>What will you change or improve?</i>	
Product / Service Fit	<i>Does your commercial offer meet customer expectations?</i>		
Pricing Strategy	<i>Is the pricing competitive and value-based?</i>		
Communication & Persuasive Techniques	<i>Are ethos, pathos, logos, scarcity, social proof effectively used?</i>		
Sales Actions / Outreach	<i>Are your marketing and sales steps realistic and actionable?</i>		
Overall Coherence	<i>Does your marketing plan flow logically and consistently?</i>		

<b>Expected Impact on Customers</b>	<i>Will your strategy create measurable results and customer engagement?</i>		
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Total Time:

**5** hours



**Learning Unit 5**  
**Supporting the  
communication  
strategy**

# Learning Unit 5: Supporting the communication strategy

## Definition/What is this about?

This unit supports participants in designing and enhancing their communication strategy by identifying their target group, analysing its needs, and tailoring their approach. Learners will explore methods for researching and defining the right audience, creating profiles to capture their characteristics, and crafting messages that address specific challenges or goals. The unit emphasizes selecting the most suitable channels, from digital tools to traditional methods, to ensure effective outreach. It also introduces the use of timelines, showing how short-, medium-, and long-term planning helps participants implement, monitor, and refine their actions, ensuring meaningful engagement and the successful development of their strategy.

## Learning Objective / What can I learn?

By the end of this unit, trainers will be able to:

- Effectively teach and support others in developing and implementing communication strategies.
- Guide learners in identifying and analysing target audiences.
- Assist learners in crafting clear, impactful messages tailored to audience needs.
- Advise on selecting the most appropriate communication channels, including traditional, digital, and emerging platforms.
- Enhance learners' ability to improve business visibility and engagement through strategic outreach.

## Introduction / What is included?

By the end of this unit, trainers will be able to:

- Apply communication principles and plan campaigns.
- Learn methods to identify target audiences and select appropriate channels and tools.
- Mentor on how to attract, engage, and retain customers.
- Leverage digital tools and AI.
- Support strong internal communication.
- Manage crisis communication effectively.
- Monitor and evaluate communication impact for continuous improvement

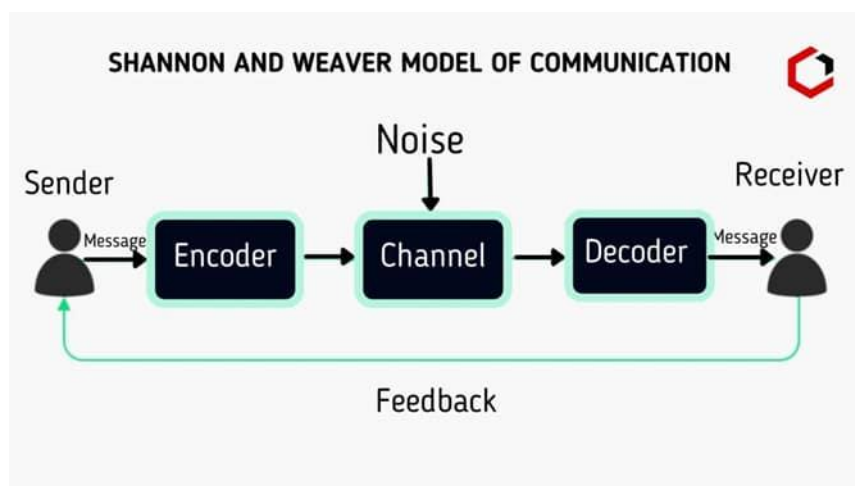
## Contextualization / Why do I need to invest my time on this?

Many businesses face challenges in communicating effectively with both internal teams and external customers. Common struggles include understanding and engaging target audiences, managing crises, and measuring the impact of communication efforts. In today's fast-changing market, organizations must be adaptable and proactive, leveraging both traditional and digital tools to maintain clarity, build trust, and stay competitive. Developing these skills not only improves operational efficiency but also strengthens stakeholder relationships and positions the organization for long-term success.

## Theoretical approach

### 1. Apply communication principles and plan campaigns.

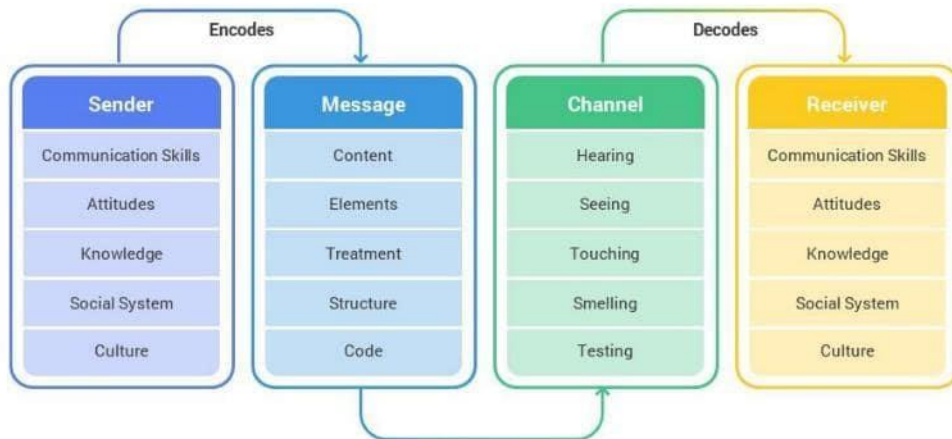
First of all, this unit will help learners develop a strong understanding of the key principles of communication and the theories that explain how messages are created and interpreted. Foundational models such as Shannon and Weaver's Linear Model of Communication (1949) describe communication as a one-way process where a sender encodes a message, transmits it through a channel, and the receiver decodes it. While acknowledging the impact of "noise" that can distort understanding.



Source: [The Shannon-Weaver Model](#)

Berlo's SMCR Model (**S**ource, **M**essage, **C**hannel, **R**eceiver) expands on this by emphasizing the importance of the communicator's skills, attitudes, knowledge, and cultural background in shaping how messages are formed and understood. In contrast, the Transactional Model of Communication presents communication as a two-way, dynamic process in which both participants are simultaneously senders and receivers, constantly providing feedback and adapting messages in real time. Together, these models highlight how effective communication depends on clarity, context, appropriate channel selection, and active feedback loops.

## Berlo's SMCR Model of Communication

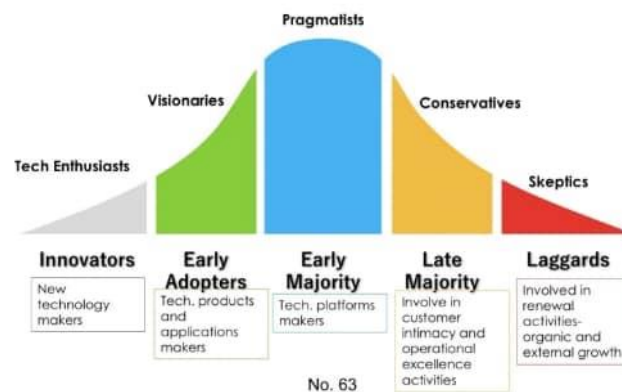


Source: [Berlo's SMCR Model](#)

Learners will also explore audience-focused theories that explain how people process and respond to information. The Elaboration Likelihood Model (ELM), developed by Petty and Cacioppo (1986), suggests that individuals process persuasive messages through two routes, the central route, where they think critically about the message content, and the peripheral route, where they rely on external cues such as credibility or attractiveness of the communicator. Understanding these routes helps communicators tailor messages based on audience motivation and involvement.

The Diffusion of Innovations Theory, proposed by Everett Rogers (1962), explains how new ideas, products, or practices spread within a community through stages such as awareness, interest, evaluation, trial, and adoption. It highlights the roles of innovators, early adopters, and opinion leaders in influencing others, which is crucial for designing campaigns that encourage behavioural change. For instance, the adoption of reusable water bottles or electric vehicles often begins with innovators who value sustainability, followed by wider public acceptance as awareness and social proof increase.

## Rogers's Innovation Adoption Curve



Source: [What is the adoption curve of innovation, and how does it work?](#)

To support persuasive and effective message design, learners will also study classical and modern communication frameworks. Aristotle's Rhetorical Theory identifies three essential appeals in persuasive communication: ethos (credibility or trust), pathos (emotional connection), and logos (logical reasoning). Framing Theory explains how the way information is presented—what aspects are

emphasized or downplayed—can influence how audiences interpret issues or events. Similarly, Agenda-Setting Theory shows how media and communicators can shape public priorities by deciding which topics receive the most attention. Together, these theories guide learners in constructing messages that are strategically framed, credible, emotionally engaging, and intellectually persuasive.

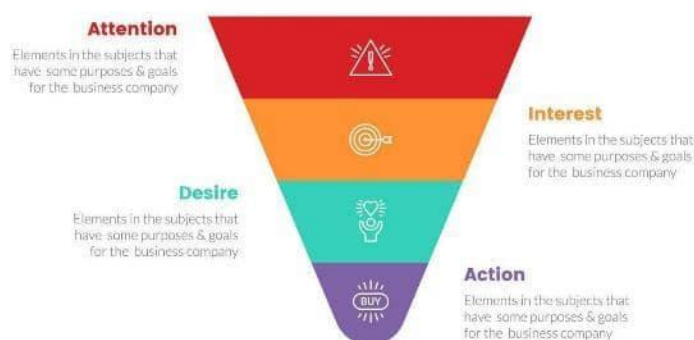
Once learners understand these principles, the unit moves into the practical application of theory in campaign planning and execution. AIDA (Attention, Interest, Desire, Action) framework outlines the psychological steps audiences take before responding to a message or making a decision. It describes how communication must first capture attention through engaging visuals or headlines, then generate interest with relevant and appealing information, create desire by emphasizing benefits or value, and finally prompt action, such as signing up, purchasing, or adopting a behaviour. For example, a company launching a new software tool might grab attention with an eye-catching demo video, generate interest by explaining its unique features, create desire by showing how it improves productivity, and prompt action by offering a free trial or download link. The AIDA model helps learners design campaigns that move audiences systematically from awareness to engagement and ultimately to measurable outcomes.

Also, the RACE Model (Research, Action, Communication, Evaluation) provides a structured process for planning communication strategies—from gathering insights and setting goals to executing messages and measuring outcomes. The Integrated Marketing Communication (IMC) approach emphasizes consistency and coordination across different channels—advertising, public relations, digital media, and social platforms—to ensure that all messages reinforce a unified brand identity and objective.

Finally, learners will explore evaluation tools and feedback mechanisms that measure campaign effectiveness. Communication audits assess whether messages are reaching their intended audiences and achieving strategic goals, while Kirkpatrick's Four-Level Evaluation Model examines campaign success through four stages: reaction (audience response), learning (knowledge gained), behaviour (changes in actions), and results (overall impact or outcomes). These evaluation techniques help practitioners refine future campaigns, ensuring they remain audience-centered, impactful, and adaptable to changing communication environments.

## AIDA MODEL

The AIDA model is just one of a class of models known as hierarchy of effects models, all of which imply that consumers move through steps or stages when they make purchase decisions



## Kirkpatrick's Four-Level Training Evaluation Model



Source: [Measuring Training Effectiveness: A Practical Guide](#)

By the end of the unit, learners will not only understand how communication works in theory but will also have the practical skills to design, implement, and evaluate effective communication strategies that engage audiences and drive meaningful results.

### 2. Learn methods to identify target audiences and select appropriate channels and tools.

A successful campaign begins with a deep understanding of the people you are trying to reach. Entrepreneurs need to understand who their **target audience** is, what drives their decisions, and how they prefer to interact with products or services. This chapter helps learners identify and understand their customers by examining their characteristics, preferences, and behaviours.

**Customer characteristics** include measurable traits such as age, gender, income, education, and location, as well as lifestyle, values, interests, and purchasing habits ([Demographic and Psychographic Segmentation](#)). By analyzing these traits, entrepreneurs can group customers with similar profiles and tailor products, services, and marketing messages to meet their specific needs.

**Stakeholder analysis** (Source: <https://amoeboids.com/blog/stakeholder-analysis/>) is a method for identifying all individuals or groups who influence or are affected by a business. For entrepreneurs, stakeholders can include customers, suppliers, partners, investors, and even competitors.

Here are some common methods for Stakeholder analysis:

- 1. Identify the stakeholders:** The first step is to make a list of all your internal and external stakeholders. Ensure you include everyone who will impact your project or be affected by it. The more comprehensive your list, the better you will be prepared.
- 2. Classify the stakeholders:** Each stakeholder in your list will have a different level of influence and interest in the project. Now, categorize your stakeholders into these categories to prioritize the high-power stakeholders. This will ensure that your focus on stakeholder analysis and communication is clear.
- 3. Analyse the expectations:** Talk to each stakeholder and understand their expectations. Conduct interviews and meetings to understand which stakeholders support your project and which will create roadblocks for you.

4. **Build a communication plan:** Analyse the frequency at which you need to communicate with your stakeholders. Some expect regular communication, while others only demand updates on major developments. The communication channel with each stakeholder must be decided along with the frequency.
5. **Monitor engagement:** The last step in stakeholder analysis is to monitor if the stakeholder requirements are met continuously. This is crucial because the requirements might change with time, and you must address them. Monitor the engagement and make changes whenever necessary.

**Source:** [The Intricacies of Stakeholders: Who Holds the Real Power in Business?](#)



By combining direct engagement, survey data, and broader insights from studies like the [Eurobarometer](#), entrepreneurs can develop a more informed, evidence-based strategy for managing stakeholder relationships effectively.

Techniques such as audience segmentation, stakeholder analysis, and audience profiling give entrepreneurs insights that make their offerings and marketing more relevant and appealing. Equally important is knowing **how to communicate with each group**. This includes choosing the right channel, determining the best time to reach them, deciding how to deliver the message, and selecting the appropriate tone. For example, a business selling children’s board games might run a radio advertisement in early December to promote popular games for Christmas. The advertisement could feature a cheerful and festive tone, highlighting the fun and educational value of the games. Scheduling the advertisement during early morning hours, when parents are stuck in traffic while taking their children to school, can effectively reach the target audience and increase the likelihood of engagement and holiday purchases

**3. Mentor on how to attract, engage, and retain customers.**

Reaching an audience is only the first step in a successful campaign. To create lasting impact, entrepreneurs must focus on attracting attention, engaging customers meaningfully, and retaining their loyalty over time. Attracting customers begins with clearly communicating value. Businesses should present solutions that meet specific needs or desires, using concise and simple language that is easy to understand. Promotions, limited-time offers, free trials, and high-quality content can draw initial interest, while creative messaging or playful wording can make campaigns more memorable.

Once attention is captured, the focus shifts to engagement. Engagement requires ongoing, two-way communication that builds trust and strengthens relationships. Responding promptly to questions or comments, encouraging participation through polls, contests, or interactive content, and maintaining a consistent tone across all channels are critical elements. Feedback should be actively sought and

incorporated, demonstrating that the customer's voice is valued. Messages should remain short, clear, and audience-centered, making it easy for customers to absorb information and act on it.

Finally, retaining customers ensures long-term success and fosters loyalty. Providing exceptional service, resolving issues quickly, and exceeding expectations strengthens the customer relationship. Loyalty programs, exclusive benefits, and personalized communication further incentivize repeat engagement. Businesses must continue to deliver value, whether through informative content, product updates, or entertaining experiences, reinforcing why customers should remain committed to the brand. Throughout all stages, monitoring engagement, satisfaction, and repeat behaviour allows entrepreneurs to refine strategies and maintain campaign effectiveness.



#### 4. Leverage digital tools and AI.

As we are living in a **technology-driven world**, digital tools and **artificial intelligence (AI)** have become essential for effective communication, engagement, and campaign management. Modern campaigns rely on technology not only to reach audiences but also to understand them, personalize interactions, and evaluate outcomes.

- **Customer Relationship Management (CRM)**

CRM platforms track customer interactions across touchpoints, from website visits to purchases and service inquiries. They allow businesses to store valuable customer information, segment audiences based on behavior, and send targeted communications. This ensures that campaigns are not generic but tailored to the needs, preferences, and engagement history of each customer, enhancing satisfaction and loyalty. Examples of CRM tools include Salesforce, HubSpot, Zoho CRM, Pipedrive, and Microsoft Dynamics 365. Other popular options are Zendesk, Insightly, and [monday.com](https://www.monday.com), which serve a range of business needs, from marketing and sales to customer service and project management.

- **AI-Powered Tools**

AI technologies enhance campaign effectiveness by providing capabilities beyond manual efforts. Chatbots can handle routine inquiries instantly, freeing human resources for complex tasks. Predictive analytics use past data to forecast customer behavior, such as likely purchases or churn risk. AI can also generate content suggestions, personalize offers, and identify emerging trends, helping businesses act proactively. These capabilities allow campaigns to be responsive, adaptive, and audience-centered. Examples include **chatbots** like Drift and Intercom for instant customer support, **predictive analytics** like Salesforce Einstein to forecast behaviour, and **content tools** like Jasper for generating personalized marketing messages.

- **Measurement and Optimization**

Digital tools and AI provide robust analytics to track campaign performance in real time. Dashboards display engagement metrics, conversion rates, and customer behavior, while AI can uncover patterns

that humans may overlook. This allows entrepreneurs to continuously optimize campaigns, adjust messaging, and allocate resources efficiently, ensuring campaigns remain effective even in changing environments.

- **Response Strategy**

It is also essential to have a clear strategy for handling responses on each channel or tool. AI chatbots can manage basic or routine inquiries, providing instant replies, while more complex questions should be directed to the appropriate human team—such as HR for personnel issues, customer service for support requests, or communications officers for public inquiries. Defining responsibility ensures timely, accurate, and consistent communication.

By integrating digital tools and AI, entrepreneurs can design smarter campaigns that are efficient, personalized, and measurable, reducing manual work while enhancing audience engagement and overall results.

## 5. Support strong internal communication and manage crisis.

Strong internal communication and crisis management are grounded in **organizational communication theory** and **strategic communication principles** ([Defining Strategic Communication](#)). Effective internal communication aligns employees with organizational goals, builds trust, and fosters engagement.

### Key Principles of Internal Communication:

- **Clarity and Consistency:** Messages should be clear, unambiguous, and consistently aligned with organizational objectives. Conflicting information can create confusion and reduce trust
- **Two-Way Communication:** Employees should have opportunities to provide feedback, ask questions, and participate in decision-making. Surveys, suggestion boxes, and interactive platforms can support this.
- **Timeliness:** Information must be shared promptly to ensure employees can act on it effectively, especially during organizational changes or critical projects.
- **Audience-Centered Approach:** Communication should consider the audience's needs, role, and level of understanding, tailoring messages accordingly.

Crisis communication involves preparation, rapid response, and transparency to mitigate risks and protect the organization's reputation. Crises can range from product recalls and operational disruptions to reputational issues or emergencies affecting employees.

### Key components include:

- **Crisis Preparedness:** Develop a crisis communication plan that identifies potential scenarios, designates spokespersons, and establishes protocols for internal and external messaging.
- **Rapid and Accurate Messaging:** Provide timely, factual updates to prevent misinformation and reduce uncertainty. This often involves using multiple channels such as email, intranet, internal messaging apps, or video briefings.
- **Role Clarity and Coordination:** Ensure all employees understand their responsibilities during a crisis, which reduces confusion and supports coordinated action.
- **Feedback and Monitoring:** Maintain open channels for employee feedback, monitor sentiment, and adjust messages as the situation evolves.

Practical tools and strategies can help strengthen internal communication and support effective crisis management. Organizations can **use internal newsletters or bulletins** to provide regular updates and reinforce key priorities, while **collaboration platforms** such as Slack, Microsoft Teams, or Workplace by Meta enable real-time communication and teamwork. Pre-prepared crisis communication templates allow for rapid and consistent dissemination of information during urgent situations. Additionally,

**employee training and simulations** help staff practice responses to potential crises, ensuring they understand their roles and can act confidently when challenges arise.

## 6. Monitor and evaluate communication impact for continuous improvement.

**Effective communication** is not a one-time effort; it requires continuous **monitoring and evaluation**. Learners will explore practical methods to track performance, including audience engagement, feedback, and response rates across different communication channels.

Learners will also discover how to measure message effectiveness using a variety of tools and techniques. These include surveys and questionnaires to collect feedback from customers, clients, or employees and gauge clarity, relevance, and overall satisfaction; analytics platforms to track website or email metrics such as open rates, click-through rates, conversions, and time spent on content; social media insights to monitor likes, shares, comments, reach, and follower growth on platforms like Facebook, Instagram, LinkedIn, and Twitter; key performance indicators (KPIs) to define measurable benchmarks such as customer response time, lead generation, webinar attendance, or newsletter subscriptions; A/B testing to compare different versions of messages, emails, or posts to determine which generates better engagement; focus groups or interviews to gather qualitative insights on perceptions, clarity, and emotional impact of messages; sentiment analysis to evaluate the tone of feedback or social media mentions and gauge audience attitudes; and engagement heatmaps to track how users interact with websites or digital content to assess message placement and effectiveness.

To make monitoring and evaluation more focused and actionable, learners will apply SMART goals, which are Specific, Measurable, Achievable, Relevant, and Time-bound. For example, a SMART goal could be: “Increase customer inquiries through the website by 15% within two months by adding clear call-to-action buttons and follow-up messages.”

Evaluation on the other hand, is not only about measuring results but also about identifying strengths, weaknesses, and opportunities for improvement. Learners may assess whether a campaign message was clear, timely, and persuasive, or whether internal communications helped employees stay informed and motivated. They can examine factors such as the consistency of messaging across different channels, the relevance of content to the target audience, and the overall alignment with business objectives. Evaluation also includes understanding audience behaviour and preferences, such as which messages prompted action, which generated engagement, and which were ignored. Learners can identify gaps in communication, areas where misunderstandings occurred, or points where the intended message failed to resonate. By reflecting on these insights, learners can develop strategies for improvement, adjust messaging, optimize timing, and select the most effective communication channels. Ultimately, this process enables auto-entrepreneurs to create more impactful, efficient, and audience-centered communication that drives business growth and strengthens relationships.

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20 proven customer retention strategies for 2024 <https://www.outreach.io/resources/blog/customer-retention-strategies>

CMI, 2020. Developing Strategy. [Developing Strategy - CMI](#)

Your ultimate guide to building customer loyalty in 10 easy ways <https://www.sprinklr.com/blog/building-customer-loyalty/>

## Practical action points / Can I have some tips?

### Practical key actions:

- **Analyse your product/service and audience**  
Conduct thorough research to understand your offering and target audience. Identify their needs, preferences, and communication channels.
- **Study competitors and differentiate**  
Examine competitors' strategies and identify opportunities to stand out. Focus on unique value propositions and messaging that sets you apart.
- **Create or strengthen your branding**  
Define your brand identity, voice, and messaging. Ensure consistency across all channels and touchpoints to build recognition, trust, and a clear market position.
- **Plan with a Gantt chart and regular check-ins**  
Use a Gantt chart to schedule tasks, milestones, and deadlines.
- **Monitor campaign KPIs**  
Track key performance indicators (KPIs) such as engagement rates, conversions, reach, and feedback to evaluate the effectiveness of campaigns. Use insights to optimize strategies and improve outcomes continuously.
- **Incorporate real-life, recent case studies and examples**  
Integrate up-to-date examples from actual events to illustrate effective and ineffective communication strategies, helping learners apply theory to practical situations

## Evaluating success /Let's evaluate what I learnt!

### Multiple-Choice Quiz

**1.Which of the following is NOT a key principle of effective communication?**

- a) Clarity
- b) Consistency
- c) Assumption of understanding**
- d) Audience awareness

**2.The most important factor in choosing a communication channel is:**

- a) Popularity of the channel
- b) Cost of using the channel
- c) How effectively it reaches and engages the target audience
- d) Ease of use for the sender

**3.Stakeholder analysis is primarily used to:**

- a) Identify individuals or groups who can influence or be impacted by communication efforts
- b) Segment customers by spending habits
- c) Evaluate campaign KPIs
- d) Profile competitors' audiences

**4.Which of the following is least likely to be included in audience profiling?**

- a) Preferred communication channels
- b) Buying motivations
- c) Personal values and beliefs
- d) Competitors' profit margins

**5.A company notices that repeat purchases have dropped among its most loyal customers. Which strategy would be most effective to re-engage this segment?**

- a) Launch a generic discount campaign for all customers
- b) Analyse previous interactions and send personalized offers or content
- c) Reduce customer service touchpoints to save costs
- d) Focus entirely on acquiring new customers

**6. Which metric would best indicate long-term customer loyalty in a retention strategy?**

- a) Number of new website visitors
- b) Customer Lifetime Value (CLV)
- c) Total ad impressions
- d) Employee engagement scores

**7. A company wants to improve engagement on its digital channels using AI. Which approach best leverages AI's capabilities?**

- a) Automatically posting the same content across all channels
- b) Using AI to generate personalized content, optimize posting times, and recommend topics based on audience behaviour
- c) Using AI only for grammar and spell-checking
- d) Avoid AI to maintain "human-only" content creation

**8. During a departmental reorganization, employees report confusion about their roles and responsibilities. What is the most effective internal communication approach?**

- a) Send a long email detailing the changes without follow-up
- b) Conduct interactive workshops and provide Q&A channels to clarify roles
- c) Rely solely on team leaders to inform employees verbally
- d) Post a brief notice on the company intranet and wait for questions

**9. Which internal communication practice most strongly drives employee engagement?**

- a) Top-down announcements without feedback
- b) Two-way communication with clear goals, recognition, and transparency
- c) Limiting information sharing to senior management
- d) Using only automated messaging tools

**10. Which of the following is the most advanced way to test crisis readiness in an organization?**

- a) Conduct tabletop exercises simulating realistic scenarios with real-time decision-making
- b) Provide a written manual on crisis procedures
- c) Ask staff to read previous press releases
- d) Watch online tutorials on crisis management

## Reflection

Add 2–3 thought-provoking questions for learners to reflect upon

Encourage deeper thinking on motivation, challenges, and opportunities in transnational entrepreneurship

- What are the potential risks of miscommunication or unclear communication in a transnational business environment, and how can you proactively prevent them?
- Why is it important to assess KPIs and continuously update the communication strategy?
- How can using ideas and connections from different countries help your business grow and stay ahead?

## References & Bibliography

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## Tool n°1: Communication Planning Workshop.

### AIM

Learners develop a strategic communication plan under competitive and real-world constraints, integrating audience insights, messaging, digital tools, and crisis readiness.

### LEARNING OUTCOMES

Participants will be able to design and implement strategic communication plans that effectively target audiences, leverage digital tools and AI, manage internal communication, and respond to crises. They will also evaluate outcomes using KPIs and feedback to continuously refine strategies for maximum impact.

### DURATION

90 minutes.

### MATERIALS

#### 1. Scenario briefs

Example:

##### Product Launch – Online Bookstore

- **Company:** BookHive  
**Product:** A bookstore offering both new and second-hand books, with curated categories, personalized recommendations, and easy delivery.  
**Target Audience:** Students seeking affordable textbooks, avid readers looking for novels, bestsellers, or rare editions, and eco-conscious consumers interested in sustainable shopping and second-hand books.
- **Challenge:** Segment the target audience, design tailored messages for each group, select the most effective communication channels, and define measurable KPIs to drive engagement, sales, and customer retention for the online bookstore.

#### 2. Audience segmentation table templates

Example:

##### Audience Segmentation table for Online Bookstore BookHive

Audience Segment	Age	Interests / Values	Behavior / Habits	Preferred Channels	Notes / Messaging Focus
Students	18 – 25	Affordable textbooks, budget-friendly	Search online for course books, comparison shop	Instagram, TikTok, Email	Highlight discounts, availability, and quick delivery
Avid Readers	20 – 40	Reading for leisure, collecting books	Browse bestsellers, book blogs, reviews	Social media, Blog, Email	Emphasize curated selections, recommendations, and rare finds

<b>Eco-Conscious Consumers</b>	20 – 45	Sustainability, reducing waste	Prefer second-hand books and eco-friendly products	Instagram, Facebook, Email	Focus on eco-friendly benefits of second-hand options
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### 3. Stakeholder mapping templates

Example

#### Stakeholder Mapping – BookHive Online Bookstore

Stakeholder	Influence	Interest	Communication Needs	Priority
<b>Students (Primary Buyers)</b>	Medium	High	Information on discounts, new arrivals, course materials	1
<b>Avid Readers</b>	Medium	Medium	Updates on bestsellers, rare finds, recommendations	2
<b>Eco-Conscious Consumers</b>	Low	Medium	Sustainability initiatives, second-hand book options	3
<b>Suppliers / Publishers</b>	High	High	Inventory updates, partnership terms, order forecasts	1
<b>Marketing Team</b>	High	High	Campaign planning, audience insights, KPI updates	1
<b>Customer Support Team</b>	Medium	High	Updates on customer queries, FAQs, order handling	2
<b>Investors / Stakeholders</b>	High	Medium	Business performance updates, growth metrics	1

### 4. KPI tracking & analytics

Using an Excel template to have all the details in one place and to track the performance of the campaigns.

### 5. Whiteboards, flip charts, markers, sticky notes

For brainstorming, mapping audience segments, visualizing messaging, and team collaboration.

## METHODOLOGY

The methodology combines:

- **Experiential Learning:** Hands-on exercises where participants apply communication planning concepts to realistic scenarios.
- **Collaborative Problem-Solving:** Team-based activities to segment audiences, map stakeholders, and design messages and channels.

- **Scenario-Based Practice:** Real-world challenges that simulate competitive and organizational constraints.
- **Guided Reflection & Feedback:** Trainer-led evaluation and discussion to identify strengths, gaps, and improvements.
- **Iterative Strategy Development:** Use of KPIs and analytics to refine and optimize communication plans continuously

## PROCESS

1. **Introduction (10 min)** – Trainer briefly introduces key concepts: audience segmentation, messaging, channels, crisis readiness, and KPIs.
2. **Scenario Briefing & Example Presentation (10 min)** – Trainer presents one scenario and explains the business goals, target audience, and challenges.
3. **Group Work: Communication Plan Development (40 min)** – Learners work on:
  - Audience segmentation
  - Stakeholder mapping
  - Message creation
  - Channel selection
  - KPI tracker template and use sticky notes and visual aids for collaborative planning.
4. **Team Presentations & Discussion (25 min)** – Each team presents their communication plan. Trainer facilitates discussion on choices, rationale, and effectiveness of strategies, providing feedback and encouraging peer learning.
5. **Wrap-up (5 min)** – Trainer summarizes lessons learned, best practices, and encourages reflection on real-world application.

## TIPS FOR TRAINERS

- **Encourage Collaboration:** Ensure all participants actively contribute and take on roles during group exercises.
- **Use Visual Aids:** Whiteboards, sticky notes, and charts help teams map audiences, stakeholders, and messages clearly.
- **Guide, Don't Solve:** Let teams make decisions on segmentation, messaging, channels, and KPIs, stepping in only when needed.

**Facilitate Reflection:** During presentations, prompt teams to explain their rationale and consider improvements.

## ASSESSMENT

To evaluate the workshop, participants' communication plans can be assessed based on the **completeness of audience segmentation** and the **clarity of stakeholder mapping**, ensuring all key audiences and their relationships are accurately identified. During team presentations, participants can **vote on each plan** according to the effectiveness of messaging, appropriateness of chosen channels, and realism of KPIs.

## REFERENCES

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## Tool n°2: Crisis Simulation & Response Workshop.

### AIM

Prepare learners to respond to unexpected communication crises effectively.

### LEARNING OUTCOMES

- Handle high-pressure communication scenarios.
- Apply crisis communication frameworks.
- Use digital tools to monitor and respond to stakeholder concerns.
- Evaluate response effectiveness using KPIs and feedback loops.

### DURATION

75 minutes.

### MATERIALS

- Crisis scenario briefs (e.g., social media backlash, product recall, negative press).
- Stakeholder mapping templates.
- Messaging templates, action steps and role assignment.

Example

Role	Person Assigned	Main Task	Output/Deliverable
Spokesperson		Prepare and deliver press briefing	Draft statement
Social Media Lead		Draft and publish online response	Posts/threads
Stakeholder Liaison		Coordinate with partners/authorities	Emails/briefings
Monitoring Officer		Track sentiment and media coverage	Dashboard report

## KPI tracking sheets to define KPI's.

Example

Crisis Response KPI Tracking Template

Team \_\_\_\_\_ Name \_\_\_\_\_ / \_\_\_\_\_ Scenario: \_\_\_\_\_  
 Date: \_\_\_\_\_

KPI	Definition / Measurement	Target / Benchmark	Actual Result	Notes / Observations
Response Speed	Time taken from awareness of crisis to first public statement	e.g., <2 hours		
Stakeholder Coverage	% of key stakeholders reached (customers, retailers, regulators, staff)	e.g., 90% within 24h		
Message Clarity	Level of understanding and engagement (feedback, questions, social media comments)	e.g., <10% queries for clarification		
Sentiment Analysis	Positive vs negative mentions online and in media	e.g., >70% neutral/positive		
Optional Additional KPI	_____	_____		

- Whiteboards, sticky notes, flip charts, markers.

## METHODOLOGY

The methodology combines:

- **Experiential Learning:** Realistic crisis scenarios and practical application of crisis communication concepts.
- **Team-based Decision making:** Participants work together to assess the crisis, identify key stakeholders, and develop a coordinated response.
- **Scenario-Based Practice:** Real-world challenges where learners practice navigating multiple audience needs simultaneously.
- **Guided Reflection & Feedback:** Trainer-led evaluation and discussion to identify strengths, gaps, and improvements.
- **Evaluation Using KPIs and Analytics:** After the simulation, learners assess the effectiveness of their crisis response using predefined metrics. Reflection on what worked, what could improve, and how performance could be measured in a real-world scenario.

## PROCESS

1. **Introduction (10 min)** – Trainer briefly introduces key concepts such as crisis communication principles, stakeholder identification, messaging, etc

2. **Scenario Briefing & Example Presentation (5 min)** – Trainer presents one crisis scenario.
3. **Group Work: Crisis Response Development (30 min)** – Learners work in teams to assess the crisis, map stakeholders, craft internal and external messages, and define action steps. Teams assign roles (e.g., spokesperson, social media lead) and plan digital communication responses using templates and sticky notes for collaborative planning.
4. **Team Presentations & Discussion (20 min)** – Each team presents its crisis response strategy. Trainer facilitates discussion on decisions, rationale, response speed, message clarity, and stakeholder coverage, providing feedback and encouraging peer learning.
5. **Reflection & KPI Evaluation (10 min)** – Trainer guides reflection on lessons learned and best practices. Teams evaluate their performance using predefined KPIs, considering what worked, what could improve, and how these insights apply to real-world crises

## TIPS FOR TRAINERS

- **Simulate Real Pressure:** Keep strict time limits to mimic the urgency of real-world crises.
- **Encourage Role Distribution:** Assign roles such as spokesperson, social media manager, and stakeholder liaison to make the exercise realistic and ensure equal participation.
- **Guide, Don't Direct:** Step back and let teams make their own crisis decisions, intervening only when clarification is needed.
- **Highlight Multiple Perspectives:** Prompt learners to consider how different stakeholders (e.g., customers, media, internal staff) may perceive messages.

## ASSESSMENT

The effectiveness of the workshop can be assessed through the **quality of each team's crisis response**. Key criteria include the completeness of stakeholder mapping, the clarity and appropriateness of internal and external messaging, and the speed and coordination of the overall response strategy. In addition, participants are evaluated on their ability to reflect on their performance using predefined KPIs.

## REFERENCES

- Coombs, W.T. (2021). *Ongoing Crisis Communication: Planning, Managing, and Responding*. Sage Publications

## Tool n°3: Digital Channel Optimization Workshop.

### AIM

Help learners select and optimize digital communication channels for maximum engagement.

### LEARNING OUTCOMES

- Identify the best communication channels for different audiences.
- Create digital messaging that maximizes reach and engagement.
- Use analytics tools to assess and refine campaigns.

### DURATION

75-90 minutes.

### MATERIALS

- Laptops or tablets with internet access
- Scenario cards including a campaign goal, target audience and key challenges
- Whiteboard or digital collaboration tool (e.g., Miro, Jamboard, or Google Slides)
- Analytics tools access (Google Analytics demo account or screenshots if live access is not possible)

### METHODOLOGY

An experiential and visual learning approach, combining hands-on exercises with conceptual understanding to help learners select and optimize digital communication channels. Participants engage in audience analysis, channel mapping, and messaging design while collaborating in pairs or small groups. They then use analytics tools to evaluate engagement and refine their strategies, fostering data-driven decision-making.

### PROCESS

1. **Introduction & Context (10 min)** – Trainer introduces the concept of digital channel optimization, emphasizing audience fit, reach, and engagement. Shares a couple of quick case studies showing how channels can succeed or fail.
2. **Scenario Assignment (10 min)** – Participants are divided into small teams (2–3 people) and trainer hands out scenario cards to each team.
3. **Group Work: Channel Showdown & Messaging (30 min)** – Teams analyse their scenario to identify all potential digital channels and select the top 2–3 channels and draft sample messages for each channel (tone, format, call-to-action).
4. **Peer Review & Discussion (20 min)** – Instead of each team presenting to the whole group, teams rotate to review another team's channel plan and messages. Each team spends 2–3 minutes reviewing a peer team's work, leaving sticky notes or digital comments with feedback, suggestions, or questions.
5. **Wrap-up (10 min)** – Trainer summarizes key insights from the activity and explains how these strategies can be applied in real-world campaigns.

## TIPS FOR TRAINERS

- **Prepare scenarios carefully:** Ensure each scenario card has a clear goal, target audience, and relevant constraints to make the exercise realistic and engaging.
- **Encourage creativity:** Remind participants that multiple channels and messaging approaches can work; focus on reasoning and engagement rather than “right answers.”
- **Facilitate, do not dominate:** Circulate among teams, ask probing questions, and give examples when participants are stuck, but let them drive the discussion.

## ASSESSMENT

Assessment focuses on participants' ability to select appropriate digital channels for a given audience and craft clear, engaging messages for each channel. Trainers evaluate how well participants justify their choices, demonstrate creativity, and consider audience needs and campaign objectives. Active participation in team discussions, collaboration during the Peer Review Carousel, and the quality of insights shared during reflection are also assessed, emphasizing practical application and strategic thinking rather than “right” or “wrong” answers.

## REFERENCES

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## Tool n°4: Crafting Messages that Captivate.

### AIM

Empower learners to craft compelling, imaginative messages that capture audience attention, evoke emotion, and leave a memorable impact by blending practical communication with creative storytelling.

### LEARNING OUTCOMES

By the end of this workshop, participants will be able to:

- Transform ordinary communication into engaging narratives.
- Apply creative storytelling frameworks to real-world scenarios.
- Adapt messages for different audiences and channels using imaginative approaches.
- Evaluate message impact using feedback and simple KPIs.

### DURATION

70 minutes.

### MATERIALS

- Storytelling frameworks/templates (e.g., Problem–Solution, Hero’s Journey).
- Audience segmentation tables
- Messaging templates (short messages, posts, or press releases).
- Whiteboards, flip charts, markers, sticky notes

### METHODOLOGY

The methodology combines experiential learning, team-based narrative design, and scenario-driven practice to help participants create compelling, audience-focused messages. Learners work in teams to craft stories using structured frameworks such as the Hero’s Journey or Problem–Solution model, while assigning creative roles to encourage collaboration and engagement. Scenarios are designed to challenge participants to adapt messaging for different audiences, channels, and contexts, blending imaginative thinking with practical communication goals. Trainers facilitate guided reflection and feedback, helping teams evaluate the clarity, emotional impact, and persuasiveness of their messages. Simple KPIs and audience feedback are used to assess effectiveness, linking creative storytelling techniques to measurable communication outcomes.

### PROCESS

- 1. Introduction (10 min)** – Trainer introduces storytelling frameworks and imaginative narrative techniques. Emphasize how even ordinary messages can become magical.
- 2. Scenario Briefing & Example Presentation (10 min)** – Trainer presents a whimsical scenario and demonstrates a creative story/message using a storytelling framework.
- 3. Group Work: Narrative Development (30min)** – Teams: Assign creative roles, selection of communication channel, develop internal and external messages using fantasy personas and apply storytelling frameworks, tone of messaging, duration/length of the message.

4. **Team Presentations & Discussion (10 min)** – Each team presents its story-driven messages. Trainer facilitates discussion on clarity, creativity, engagement, and alignment with audience personas.
5. **Wrap-Up & Reflection (10 min)** – Trainer highlights best practices, imaginative techniques, and encourages reflection on applying creativity to real-world messaging

#### TIPS FOR TRAINERS

- Encourage imaginative thinking while maintaining message clarity.
- Promote role-playing to make message creation engaging.
- Guide teams to consider how fantastical storytelling principles can translate into professional communication

#### ASSESSMENT

Trainers can use a “**Story Impact Score**”, rating each team on criteria such as originality, emotional resonance, clarity of message, and alignment with audience needs. Peer feedback is incorporated, allowing teams to vote on the most compelling stories, fostering a playful, competitive, and reflective learning environment.

#### REFERENCES

- Simmons, A. (2007). *The Story Factor: Inspiration, Influence, and Persuasion through the Art of Storytelling*.
- Fog, K., Budtz, C., Munch, P., & Blanchette, S. (2010). *Storytelling: Branding in Practice*. Springer.

Total Time:

**7** hours

# Learning Unit 6

# Business accounting and financial management

# Learning Unit 6: Business accounting and financial management

## Definition / What is this about?

Business accounting and financial management refer to the systematic recording, analysing, and managing of financial information to make informed business decisions. Mastery of these skills is crucial for entrepreneurs to ensure business sustainability, monitor profitability, and secure financing. Investing time in this unit equips trainers to help learners navigate financial uncertainty and develop structured, data-driven decision-making skills.

## Learning Objective / What can I learn?

By the end of this unit, trainers will be able to:

- Explain key accounting principles and interpret financial statements.
- Draw up a provisional budget and apply cost/revenue estimation techniques.
- Develop and use basic financial management tools to monitor business performance.
- Analyse profitability, cash flow, and viability.
- Identify financial partners and support learners in fundraising.

## Introduction / What is included?

This learning unit provides a comprehensive overview of key financial and accounting concepts essential for effective business management. It includes the principles of accounting and the preparation and interpretation of financial statements, laying the groundwork for informed decision-making. Students will explore budgeting techniques, including the creation of provisional budgets, to plan and control organizational resources efficiently. The course also examines financial ratios and management indicators, equipping learners with tools to assess performance and operational efficiency. The unit addresses profitability analysis, cash flow management, and financial viability, enabling participants to evaluate and sustain the financial health of a business. Finally, the unit covers strategies for identifying financial partners and securing funding, providing practical guidance for fundraising and investment development.

## Theoretical approach

### Principles of budgeting

#### Business Accounting

Business accounting is often described as the language of business because it translates day-to-day activities into financial information that owners, managers, investors, and regulators can use to make decisions. At its core, it is the process of identifying, measuring, and communicating economic information in order to permit informed judgments and effective decision-making by its users. Accounting

is a fundamental component of business management, and inadequate financial practices can significantly undermine an organization's stability and long-term viability. Accounting may be defined as "the process of analysing, classifying, recording, summarizing, and interpreting business transactions. One of the key aspects of the process is keeping 'running totals' of 'things'" (University of North Georgia, n.d., p. 1)

## Forecasting

Forecasting is the process of predicting future financial outcomes based on historical data, market trends, and informed assumptions. For entrepreneurs, forecasting helps estimate revenues, costs, and cash flows over a defined period, providing a roadmap for decision-making. Accurate forecasts support strategic planning, highlight funding needs in advance, and allow businesses to prepare for risks and opportunities. While forecasts are not exact predictions, they offer valuable insights that help entrepreneurs adapt to uncertainty, especially in cross-border ventures where market fluctuations and exchange rate risks can impact results.

## Financial Management

Financial management goes beyond recording day-to-day transactions—it is the process of planning, monitoring, and controlling resources to ensure a business can grow sustainably. In line with the learning objectives, entrepreneurs must first be able to interpret financial statements to understand their current position, then use this information to draw up provisional budgets and estimate future revenues and costs. Through profitability analysis, they can evaluate whether their products or services are generating sufficient returns, while liquidity and cash-flow monitoring allow them to anticipate and prevent shortages that could jeopardize operations. Solvency checks—using tools like ratio analysis—help assess the long-term viability of the business. Techniques such as break-even analysis also guide decision-making by clarifying the minimum sales volume required to cover costs.

Crucially, financial management is not just about internal monitoring but also about building external credibility. Entrepreneurs who can present clear, reliable budgets and performance indicators are better positioned to engage with financial partners and attract funding. By developing these skills, trainers can support learners in managing their ventures effectively, analysing risks and opportunities, and securing the resources needed for cross-border entrepreneurship.

## Cost Estimation

Cost estimation is the systematic process of predicting the total expenditure associated with a business activity, project, or operation, based on available data, historical records, and expert judgment, to support decision-making, budgeting, and financial planning.

Four fundamental principles underpin cost estimation:

- 1- **The theory of cost estimation:** In business management, cost estimation is the process of forecasting the quantity, cost, and price of resources required to execute a project or business initiative. A project, in this context, can be any planned set of activities aimed at achieving strategic objectives, such as launching a new product, implementing a system, or developing organizational capabilities. The accuracy of the cost estimate depends on how clearly the scope and objectives of the project are defined. As the details of the project—including tasks, resources, and operational conditions—become better specified, the estimates become more precise, enabling more effective budgeting, planning, and decision-making

- 2- **Cost estimation for budgeting and informed decision making:** Cost estimation is a critical tool in business management, enabling decision-makers to evaluate investment options, compare alternatives, and establish budgets during the early stages of projects or initiatives. For external stakeholders, such as clients, cost estimates also provide a means to validate proposals from vendors or contractors. As projects progress, the initial budget serves as a baseline for monitoring performance and assessing whether objectives are being met.
- 3- **Project scope visualized in various reporting structures:** Estimating in business management involves decomposing the overall scope of a project into smaller, manageable components, allocating the necessary resources, and calculating the associated costs. This approach allows organizations to create structured breakdowns that effectively communicate estimates to stakeholders. Common standardized methods include the Work Breakdown Structure (WBS), the Cost Breakdown Structure (CBS), and the Resource Breakdown Structure (RBS). In practice, project teams and external stakeholders often use multiple breakdown structures simultaneously to ensure cost data is accurately reported, shared, and aligned with the diverse needs of all parties involved.
- 4- **The role of a Detailed Basis of Estimate (BOE):** A cost estimate is more than just a compilation of numbers; it should be accompanied by a detailed Basis of Estimate (BOE) report. The BOE outlines the assumptions, inclusions, exclusions, level of accuracy, and other critical factors needed to interpret the total cost of a project or initiative. Without this context, the estimate alone provides little meaningful insight. The BOE is essential for effectively communicating estimates to decision-makers and stakeholders. It also serves as a valuable reference during project closeout, enabling comparisons with other projects and supporting organizational learning.



**Figure SEQ Figure \ \* ARABIC 4-** Four Principles of Cost Estimation- Adapted from [Cleopatra](#)

### Cost of Revenue

“The term cost of revenue refers to the total cost of manufacturing and delivering a product or service to consumers. Cost of revenue information is found in a company's income statement. It is designed to represent the direct costs associated with the goods and services the company provides. The service industry often favours using the cost of revenue metric because it is a more comprehensive account of the various costs associated with selling a good or service” (Investopedia, 2025).<sup>5</sup>

<sup>5</sup> Investopedia. (2025). Cost of revenue. Investopedia. <https://www.investopedia.com/terms/c/cost-of-revenue.asp>

Cost of Revenue (CoR) refers to the total cost directly associated with delivering a product or service to customers. It includes all expenses necessary to generate revenue, such as:

- Production costs (materials, manufacturing, or service delivery)
- Direct labour costs
- Distribution and shipping costs
- Fees related to sales platforms or digital services

The formula for the cost of revenue is:

$$\text{CoR} = \text{Direct Production Costs} + \text{Direct Labor Costs} + \text{Distribution/Delivery Costs} + \text{Other direct costs}$$

**Where:**

**Direct Production Costs** = Materials, manufacturing, or service production expenses.

**Direct Labor Costs** = Salaries/wages for employees directly involved in producing or delivering the product/service.

**Distribution/Delivery Costs** = Shipping, handling, or platform fees.

**Other Direct Costs** = Licensing fees, customer support for service delivery, or other costs directly tied to generating revenue.

It is important in business management as:

- Helps calculate gross profit: Revenue – Cost of Revenue = Gross Profit
- Guides pricing decisions to ensure profitability
- Supports budgeting and financial planning
- Evaluates operational efficiency in delivering products or services

### Accrual method of accounting vs Cash method of accounting

	ACCRUAL ACCOUNTING	CASH ACCOUNTING
<b>DEFINITION</b>	Records revenues when earned and expenses when incurred, regardless of when cash is actually received or paid	Records revenues when cash is received and expenses when cash is paid
<b>FEATURES:</b>		
<b>Timing of Revenue Recognition</b>	When the sale or service occurs (earned)	When cash is received
<b>Timing of Expense Recognition</b>	When the expense is incurred (obligation arises)	When cash is paid
<b>Matching Principle</b>	Yes, matches revenues with related expenses in the same period	No, timing depends on cash flow

<b>Complexity</b>	More complex; requires adjusting entries	Simpler and easier to maintain
<b>Accuracy of Financial Position</b>	More accurate, shows true performance and obligations	Less accurate, can distort profits if cash flow timing differs
<b>Suitable for</b>	Larger businesses, corporations, those needing audited statements	Small businesses, sole proprietors, or those focused on cash flow
<b>GAAP / IFRS Compliance</b>	Required under GAAP and IFRS	Not accepted under GAAP/IFRS (except for very small entities)
<b>PROS/CONS</b>		
<b>Advantages</b>	<ul style="list-style-type: none"> <li>- Provides a more accurate financial picture</li> <li>- Matches income and expenses properly</li> <li>- Required for investors and audits</li> </ul>	<ul style="list-style-type: none"> <li>- Simple and easy to manage</li> <li>- Clear view of cash flow</li> <li>- Good for small cash-based businesses</li> </ul>
<b>Disadvantages</b>	<ul style="list-style-type: none"> <li>- More complex bookkeeping</li> <li>- Doesn't show real-time cash availability</li> <li>- Requires adjustments and estimates</li> </ul>	<ul style="list-style-type: none"> <li>- Can misrepresent profitability</li> <li>- Not GAAP/IFRS compliant</li> <li>- Unsuitable for complex organizations</li> </ul>

## Structure and key components of financial statements

Financial statements are key sources of information for making informed business decisions. Each component of a financial statement plays an essential role, as together they form the foundation of a company's financial reporting. These components can be viewed as the building blocks of the financial statement, representing — in both words and figures — the organization's resources, the claims against those resources, and the transactions that cause changes in them<sup>6</sup>.

The key components of financial statements are intended to give a transparent and accurate view of an organization's financial position, performance, and cash flows. These components are structured according to standardized accounting frameworks, such as the International Financial Reporting Standards (IFRS) or Generally Accepted Accounting Principles (GAAP). The main components include the following:

### 1. Balance Sheet

A balance sheet is a financial statement that provides a snapshot of a company's assets, liabilities, and shareholder equity at a specific point in time. It includes the key components below:

- **Assets:** An asset is any resource owned or controlled by a business or economic entity that has present economic value and can generate future monetary benefits. Assets can be tangible,

<sup>6</sup> Johnson, R. (2022, November 9). Essential components of financial statements explained. Invensis. <https://www.invensis.net/blog/essential-components-of-financial-statement>

such as cash, inventory, property, plant, and equipment, or intangible, like patents, trademarks, and goodwill. Tangible assets are further categorized as current assets, including inventory, accounts receivable, and other short-term investments, or fixed assets, such as buildings, equipment, and other long-term physical resources. Intangible assets comprise non-physical resources that provide value to the business, including goodwill, copyrights, trademarks, patents, and similar right.

- **Liabilities:** Liabilities are a business's legal debts or obligations that arise during its operations. They represent claims others have on the company's resources and are usually settled over time by transferring economic benefits such as cash, goods, or services.

Liabilities can be categorized into two main types:

- Current liabilities: Obligations that are due within one year, such as accounts payable, salaries or wages payable, interest due, customer deposits, and other short-term obligations.
- Long-term liabilities: Obligations that are due after more than one year, including long-term bonds, notes payable, leases, pension obligations, and long-term product warranties.

In essence, liabilities reflect what a business owes to third parties and help assess the company's financial obligations and stability.

- **Equity or owner's equity:** Equity (or Owner's Equity) represents the residual interest in the assets of a business after deducting liabilities. In other words, it is the portion of the company that belongs to its owners or shareholders. Equity reflects the owners' claim on the company's resources and can increase through profits or additional investments, and decrease through losses or withdrawals.

Key components of equity often include:

- Share capital or contributed capital (funds invested by owners)
- Retained earnings (profits reinvested in the business)
- Reserves (funds set aside for specific purposes)

Balance sheets are essential for securing loans or attracting investors, as they indicate creditworthiness and overall financial health. Managers can use balance sheet data to calculate financial ratios for liquidity, profitability, and solvency, and employees can gauge job security and company stability. Despite its usefulness, a balance sheet has limitations. It reflects only a single moment in time, so it may not show trends or ongoing performance. Figures can vary based on accounting methods, depreciation, and inventory valuation, potentially allowing manipulation. Professional judgments, such as estimating uncollectible receivables, introduce subjectivity. To get a full picture, the balance sheet should be analysed alongside income statements, cash flow statements, and comparative data over time.

## Example of balance sheet:

Apple Inc.  
CONSOLIDATED BALANCE SHEETS  
(In millions, except number of shares which are reflected in thousands and par value)

	September 26, 2020	September 28, 2019
<b>ASSETS:</b>		
<b>Current assets:</b>		
Cash and cash equivalents	\$ 38,016	\$ 48,844
Marketable securities	52,927	51,713
Accounts receivable, net	16,120	22,926
Inventories	4,061	4,106
Vendor non-trade receivables	21,325	22,878
Other current assets	11,264	12,352
<b>Total current assets</b>	<b>143,713</b>	<b>162,819</b>
<b>Non-current assets:</b>		
Marketable securities	100,887	105,341
Property, plant and equipment, net	36,766	37,378
Other non-current assets	42,522	32,978
<b>Total non-current assets</b>	<b>180,175</b>	<b>175,697</b>
<b>Total assets</b>	<b>\$ 323,888</b>	<b>\$ 338,516</b>
<b>LIABILITIES AND SHAREHOLDERS' EQUITY:</b>		
<b>Current liabilities:</b>		
Accounts payable	\$ 42,296	\$ 46,236
Other current liabilities	42,684	37,720
Deferred revenue	6,643	5,522
Commercial paper	4,996	5,980
Term debt	8,773	10,260
<b>Total current liabilities</b>	<b>105,392</b>	<b>105,718</b>
<b>Non-current liabilities:</b>		
Term debt	98,667	91,807
Other non-current liabilities	54,490	50,503
<b>Total non-current liabilities</b>	<b>153,157</b>	<b>142,310</b>
<b>Total liabilities</b>	<b>258,549</b>	<b>248,028</b>
<b>Commitments and contingencies</b>		
<b>Shareholders' equity:</b>		
Common stock and additional paid-in capital, \$0.00001 par value: 50,400,000 shares authorized; 16,976,763 and 17,772,945 shares issued and outstanding, respectively		
	50,779	45,174
Retained earnings	14,966	45,898
Accumulated other comprehensive income(loss)	(406)	(584)
<b>Total shareholders' equity</b>	<b>65,339</b>	<b>90,488</b>
<b>Total liabilities and shareholders' equity</b>	<b>\$ 323,888</b>	<b>\$ 338,516</b>

See accompanying Notes to Consolidated Financial Statements.  
Apple Inc. | 2020 Form 10-K

**Figure SEQ Figure \ \* ARABIC 5** Apple's balance sheet  
Source: [Investopedia](#)

## 2. Profit and Loss Statement

The income statement provides a summary of a business's financial performance over a specific period, typically prepared quarterly or annually. Key components of this statement include:

- **Revenues:** Revenues represent the total cash or receivables a business earns during a specific period from its core operations, such as the sale of goods or services. This figure includes adjustments for discounts, returns, or allowances and may also incorporate income generated from the use of the company's assets or capital in the course of business operations. Revenues are often referred to as the "top line" or "gross income", as they form the starting point for calculating profit after deducting expenses.
- **Expenses:** Expenses are the economic costs a business incurs in the process of generating revenue through its operations. According to the International Financial Reporting Standards (IFRS), expenses are "decreases in economic benefits during the accounting period in the form of outflows or depletions of assets or incurrences of liabilities that result in decreases in equity, other than those relating to distributions to equity participants" (IFRS Conceptual Framework, 2018). Expenses encompass costs such as salaries and wages, rent, utilities, cost of goods sold, depreciation, interest, and taxes. Accounting theorists like Horngren et al. (2013) emphasize that expenses are recorded in the period in which they are incurred, following the matching principle, to ensure that the costs associated with earning revenue are properly aligned with that revenue, providing an accurate measurement of net profit or loss. To illustrate this concept, if a business sells a product in June, the cost of producing that product (materials, labour, etc.) should also be recorded in June, even if the cash was paid earlier or later.
- **Gains:** Gains are increases in a company's equity from peripheral or incidental transactions that are not part of its main business operations. Unlike revenue, which arises from primary activities like sales of goods or services, gains result from events such as the sale of an asset

above its book value, settlement of a liability for less than its recorded amount, or foreign exchange gains. Gains represent positive changes in net assets that enhance the financial position of a business but are distinct from operational income.

- **Losses:** A loss occurs when a company's expenses exceed its revenues during a specific period, meaning the business has spent more money than it earned. Losses reduce the company's net income and, therefore, decrease owners' equity. They are the opposite of profits. Types of losses:
  - Operating loss: Happens when the costs of running the business (like salaries, rent, and materials) are higher than the income from sales. Example: A business earns 10,000€ in sales but spends €12,000 on expenses → Operating loss = 2,000€
    - Non-operating loss: Results from activities not related to the core business, such as losing money on an investment or from exchange rate differences.
    - Example: Selling old equipment for less than its book value
    - Capital loss: Occurs when a long-term asset (like property or stocks) is sold for less than its purchase price. Example: Bought equipment for €5,000, sold it for €3,500 → Capital loss = €1,500.

The Profit and Loss Statement is a fundamental tool for understanding a company's financial health, guiding management decisions, meeting regulatory requirements, and communicating performance to stakeholders. It supports:

- Measuring financial performance
- Supporting the decision-making process
- Tracking trends over time
- Helping to secure financing
- Complying with legal and tax reporting requirements

# Income Statement

Cascadia Wikimedians User Group

For the period September 1, 2014 to December 13, 2015

Income	Sep 1, 2014-Dec 13, 2015
Individual donation	198.00
Membership Dues: Individual	69.00
Nonprofit Organization Grant	7,208.00
<b>Total Income</b>	<b>7,475.00</b>
<b>Gross Profit</b>	<b>7,475.00</b>
<b>Operating Expenses</b>	
Accounting Fees	134.94
Food, drinks, meal supplies, and meals	153.66
Government licenses and fees	248.46
Insurance, Non-Employee	250.00
Postage, Shipping, Delivery	4.12
Rent and Other Occupancy	359.00
Sales & use tax-custom	14.81
Supplies	103.67
<b>Total Operating Expenses</b>	<b>1,268.66</b>
<b>Operating Income</b>	<b>6,206.34</b>
<b>Net Income</b>	<b>6,206.34</b>

*Source: Example of Income Statement Source: [Wikimedia Commons](#)*

### 3. Cash-Flow Statement

A cash-flow statement is a financial report that shows how cash moves in and out of a business over a specific period. Unlike the balance sheet, which provides a snapshot of assets and liabilities at a point in time, or the profit and loss statement, which measures profitability, the cash-flow statement focuses specifically on liquidity—the company’s ability to generate and use cash.<sup>7</sup>

It is divided into three main sections:

1. **Operating Activities:** Cash generated or used by the core business operations (e.g., cash received from sales, cash paid to suppliers and employees).
2. **Investing Activities:** Cash flows related to buying or selling long-term assets, such as equipment, property, or investments.
3. **Financing Activities:** Cash flows from borrowing, repaying loans, issuing shares, or paying dividends.

Cash-flow statement is important as it:

- Shows whether the company can cover short-term obligations.

<sup>7</sup> Collins, M. (2018, March 28). Cash flow statements: How to prepare and read one. Investopedia. <https://www.investopedia.com/investing/what-is-a-cash-flow-statement/>

- Helps in planning and managing cash to avoid liquidity problems
- Provides insight into how operations, investments, and financing affect cash availability.

In short, it answers the question: “Where did the cash come from, and where did it go?”. It helps to show if the business can pay its bill and invest in growth. It also helps to track liquidity and future spending.

Company ABC					
	January	February	March	April	May
<b>CASH BALANCE</b>					
Opening Cash Balance	\$1,000.00	\$2,220.00	\$3,139.00	\$3,524.00	\$6,423.00
<b>REVENUES</b>					
In-store sales	\$500.00	\$1,000.00	\$700.00	\$3,800.00	\$1,000.00
Online sales	\$3,000.00	\$2,000.00	\$1,700.00	\$2,000.00	\$2,500.00
Other revenues	\$200.00	\$300.00	\$300.00	\$250.00	\$400.00
<b>Total Revenues</b>	<b>\$3,700.00</b>	<b>\$3,300.00</b>	<b>\$2,700.00</b>	<b>\$6,050.00</b>	<b>\$3,900.00</b>
<b>GROSS PROFITS</b>					
Cost of goods sold	\$900.00	\$830.00	\$750.00	\$1,600.00	\$950.00
<b>Gross Profits</b>	<b>\$2,800.00</b>	<b>\$2,470.00</b>	<b>\$1,950.00</b>	<b>\$4,450.00</b>	<b>\$2,950.00</b>
<b>Gross Profit Margins</b>	<b>75.7%</b>	<b>74.8%</b>	<b>72.2%</b>	<b>73.6%</b>	<b>75.6%</b>
<b>EXPENSES</b>					
<b>Fixed costs</b>					
Rent	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00
Insurance	\$100.00	\$100.00	\$100.00	\$100.00	\$100.00
Fees (banking, licenses, etc.)	\$35.00	\$35.00	\$35.00	\$35.00	\$35.00
<b>Total Fixed Costs</b>	<b>\$635.00</b>	<b>\$635.00</b>	<b>\$635.00</b>	<b>\$635.00</b>	<b>\$635.00</b>
<b>Variable costs</b>					
Payroll	\$800.00	\$800.00	\$800.00	\$800.00	\$800.00
Shipping costs	\$75.00	\$46.00	\$60.00	\$46.00	\$65.00
Utilities	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00
Equipment and supplies	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00
Marketing spend	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total Variable Costs</b>	<b>\$945.00</b>	<b>\$916.00</b>	<b>\$930.00</b>	<b>\$916.00</b>	<b>\$935.00</b>
<b>Total Expenses</b>	<b>\$1,580.00</b>	<b>\$1,551.00</b>	<b>\$1,565.00</b>	<b>\$1,551.00</b>	<b>\$1,570.00</b>
<b>NET PROFIT MARGINS</b>					
<b>EBITDA</b> Earnings Before Interest, Taxes, Depreciation, and Amortization	\$1,220.00	\$919.00	\$385.00	\$2,899.00	\$1,380.00
Interest					
Taxes					
<b>Net Profit / Losses</b>	<b>\$1,220.00</b>	<b>\$919.00</b>	<b>\$385.00</b>	<b>\$2,899.00</b>	<b>\$1,380.00</b>
<b>Net Profit Margins</b>	<b>33.0%</b>	<b>27.8%</b>	<b>14.3%</b>	<b>47.9%</b>	<b>35.4%</b>
<b>CLOSING CASH BALANCE</b>					
Closing Cash Balance	\$2,220.00	\$3,139.00	\$3,524.00	\$6,423.00	\$7,803.00

#### 4. Statement of Changes in Equity

The Statement of Changes in Equity (or Statement of Retained Earnings) provides detailed information about the evolution of a company’s equity over an accounting period. It bridges the opening and closing equity balances, highlighting factors such as profits, losses, and shareholder transactions.<sup>8</sup>

The primary components include:

- **Share Capital Transactions:** Issuance or buyback of shares that increase or decrease equity.
- **Retained Earnings:** Changes resulting from profits, losses, or dividend payments.

<sup>8</sup> Collins, M. (2018, March 28). Statement of retained earnings. Investopedia. <https://www.investopedia.com/terms/s/statement-of-retained-earnings.asp>

- **Reserves and Other Comprehensive Income (OCI):** Gains or losses transferred directly to equity without affecting the profit and loss statement (e.g., revaluation surplus, foreign currency translation adjustments).

This statement helps investors and stakeholders understand how equity changes due to operational performance, capital management, and strategic decisions. It shows how profits, losses and shareholder actions change the company's value. It helps understand how the business grows, how dividends affect equity, and how owner decisions impact net worth.

## 5. Notes to the Financial Statements

Notes to the Financial Statements are an integral part of a company's financial reporting. They provide additional context, explanations, and details that help users understand the numbers presented in the main financial statements (balance sheet, income statement, cash flow statement, and statement of changes in equity).

They aim to clarify accounting policies, assumptions, and estimates used in preparing the financial statements.

They include:

- **Accounting Policies:** Disclosure of methods (e.g., depreciation, inventory valuation) and any changes made during the period.
- **Contingent Liabilities and Commitments:** Details of obligations that are not yet realized but could impact the company's finances.
- **Breakdown of Revenue and Expenses:** Clarifications on major revenue streams or expense categories.
- **Related Party Transactions:** Disclosure of transactions with entities or individuals connected to the business.

The notes to the financial statements help make sense of accounting rules, unusual transactions and risks for better decision-making.

## Basic Financial Ratios and Management indicators for business monitoring

Financial ratios and management indicators are essential tools for monitoring the financial health of a business. They condense complex financial statements into understandable metrics, allowing entrepreneurs and managers to assess performance quickly and make informed decisions. Using these tools helps answer key questions like:

Can the business pay its short-term obligations?

Are resources being used efficiently?

Is the business profitable?

Is the business financially stable in the long term?

### 1. Key Financial Ratios

There are four types of financial ratios to assess your business performance<sup>9</sup>:

<sup>9</sup> Business Development Bank of Canada. (n.d.). Financial ratios: 4 ways to assess your business. <https://www.bdc.ca/en/articles-tools/money-finance/manage-finances/financial-ratios-4-ways-assess-business>

- **Liquidity ratios:** Liquidity ratios act as an early warning system for a business, showing whether it has enough readily available resources to meet short-term obligations. They measure cash and other easily converted assets, giving a quick overview of the company's ability to pay its debts and maintain financial stability.

Examples of liquidity ratios:

- Current ratio: it measures your ability to generate cash to meet your short-term financial commitments. **Formula:  $\text{Current Assets} \div \text{Current Liabilities}$  (Ideal:  $\geq 1.5$ )**
- Quick ratio: Like the current ratio it measures the ability to access cash quickly to support immediate demands. However, the quick ratio excludes inventory. **Formula:  $\text{Quick assets (cash+ accounts+ short-term investments)} \div \text{Current Liabilities}$  (Ideal:  $\geq 1$ )**

For both the current ratio and the quick ratio, a value of 1.0 or higher is usually considered satisfactory, though this benchmark can differ between industries.

A lower ratio may indicate potential challenges in covering short-term obligations and could limit the company's ability to respond quickly to opportunities requiring immediate funds. Low liquidity indicates risk of not being able to pay bills; high liquidity might indicate underutilized resources.

- **Efficiency ratios:** Measure how effectively a business uses its assets and resources.
  - Inventory Turnover ratio: It tells you how fast your goods are selling. It allows to see how long it takes for inventory to be sold and replaced during the year. **Formula:  $\text{Cost of Goods Sold} \div \text{Average Inventory}$**
  - *Accounts Receivable Turnover:* Its purpose is to measure how efficiently a business collects payments from its customers after making credit sales

**Formula:  $\text{Net Credit Sales} \div \text{Average Accounts Receivable}$**

- **Leverage ratios:** The main goal of leverage or solvency ratios is to assess financial risk — that is, how dependent the company is on borrowed funds and whether it can continue to meet its debt obligations even if profits decline.
  - Debt-to-Equity ratio: Indicates how much debt the company uses for every unit of equity. High ratio, higher financial risk; Low ratio, conservative financing, lower risk.

**Formula:  $\text{Total Liabilities} \div \text{Shareholders' Equity}$**

- Debt ratio: Shows the proportion of assets financed by debt

**Formula:  $\text{Total Liabilities} \div \text{Total Assets}$**

- **Profitability ratios:** Measure the ability of a business to generate profit relative to sales, assets, or equity. They are used to evaluate how much money your business is making or losing.
  - Gross Profit Margin: It represents the money that remains after a company deducts all direct expenses related to producing or acquiring the goods or services it sells. **Formula:  $(\text{Net Revenue} - \text{Direct Expenses}) \div \text{Net Revenue} \times 100\%$**
  - Net Profit Margin: The net profit margin shows how much profit a company retains from its total sales after covering all expenses, including taxes. It indicates overall profitability and efficiency. A higher net profit margin compared to competitors often reflects better cost control, operational flexibility, and capacity for growth.

**Formula:  $\text{Net Profit} \div \text{Revenue} \times 100\%$**

## Profitability, Break-even-Point and Financial Viability

Profitability, break-even analysis, and financial viability represent three interrelated dimensions of financial performance that together determine the sustainability and strategic direction of any enterprise. While profitability reflects a firm's ability to generate returns from its operations, the break-even point identifies the level of activity at which total revenues equal total costs, indicating the threshold for financial equilibrium. Financial viability, in turn, extends beyond short-term profitability to assess whether the business can sustain operations, meet its financial obligations, and grow over the long term (Atrill & McLaney, 2022).

### 1. Profitability vs Profit

Profitability measures a company's ability to generate profit relative to its size and operations. It shows whether revenue exceeds expenses and indicates the company's financial health, growth potential, and sustainability. Profitability is often expressed through financial ratios which help management and stakeholders assess efficiency and decision-making capacity.

Profitability measures how efficiently a company generates profit relative to its size and operations. Profit, in contrast, is the absolute amount of money earned after subtracting expenses from revenue:

$$\text{Profit} = \text{Total Revenue} - \text{Total Expenses}$$

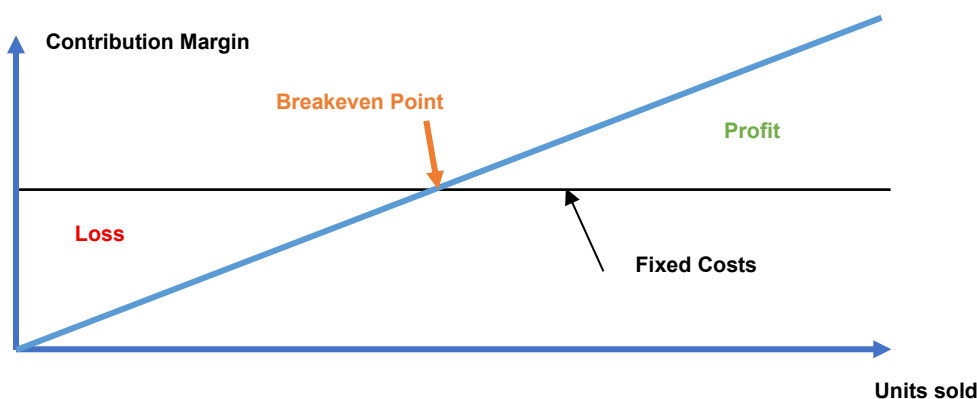
### 2. Break-even Point

The break-even point<sup>10</sup> is the level of sales at which a company's total revenue equals its total expenses, meaning there is no profit or loss. It marks the threshold between operating at a loss and generating profit.

Understanding the break-even point helps businesses plan pricing, forecast sales targets, and manage costs effectively. It is a key tool for financial planning, showing how much must be sold to cover all expenses and start earning profit.

The formula is:

$$\text{Break-Even Point (Units)} = \text{Fixed Costs} \div (\text{Selling Price per Unit} - \text{Variable Cost per Unit})$$



## Financial Viability

<sup>10</sup> Ita, D-A. (2025, March 19). Breakeven point: Definition, examples, and how to calculate. Investopedia. <https://www.investopedia.com/terms/b/breakevenpoint.asp>

Financial viability<sup>11</sup> refers to a company's ability to generate sufficient income (cash flow) to meet its obligations, sustain operations, and grow over time. It answers the question: Can this business survive and thrive financially in the long term?

Assessing financial viability involves looking at profitability, cash flow, break-even points, and access to funding. A financially viable business can cover costs, invest in growth, withstand financial challenges, and create value for stakeholders.

Financial viability is essential for ensuring a business can grow sustainably, maintain operations, and achieve long-term success. It allows companies to manage cash flow effectively, assess the profitability of products and services, and make informed decisions about investments and customer targeting. A financially viable business can secure funding more easily, optimize resource use, and maintain operational continuity.

Key factors influencing financial viability include:

- Cash Flow Management: Ensuring sufficient cash is available for day-to-day operations.
- Profitability of Products and Services: Evaluating which offerings generate sustainable returns.
- Debt and Asset Management: Monitoring liabilities and leveraging assets effectively.
- Market and Project Analysis: Assessing whether new initiatives or products will provide adequate returns.

Best practices for maintaining financial viability include:

- Prioritizing cash flow through careful planning and monitoring.
- Maintaining multiple lines of credit to support operations.
- Regularly reviewing and managing debts.
- Controlling costs and optimizing spending.
- Implementing effective credit management for customers.
- Using financial management tools and software to enhance visibility and efficiency.

## Main Sources of financing and characteristics of financial partners

### 1. The Main Sources of financing

There are 5 main sources of financing, as follows:

#### A. Equity Financing

Equity financing involves raising capital by selling shares of the company. This can come from founders, friends and family, or external investors such as angel investors or venture capitalists. Equity investors become part-owners of the business and expect a return on their investment through dividends or capital appreciation. While it does not require repayment like loans, equity financing may dilute the ownership and control of the original founders.

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<sup>11</sup> OneAdvanced. (2022, August 13). The importance of financial viability for businesses. <https://www.oneadvanced.com/resources/the-importance-of-financial-viability-for-businesses/>

## **B. Debt Financing**

Debt financing includes loans, lines of credit, or bonds that the business must repay with interest over a specified period. Banks, credit unions, or other financial institutions typically provide these funds. Debt allows the business to retain ownership, but it also requires consistent cash flow to meet interest and principal repayments. Mismanagement of debt can affect creditworthiness and the ability to secure future financing.

## **C. Grants and Subsidies**

Grants are non-repayable funds provided by governments, non-profits, or international organizations to support specific business activities such as research, innovation, or sustainability initiatives. While grants reduce financial burden, they usually come with strict eligibility criteria and reporting requirements to ensure proper use of funds.

## **D. Crowdfunding**

Crowdfunding allows businesses to raise small amounts of capital from a large group of people, often via online platforms. This method is particularly useful for product-based ventures or community-supported initiatives. Beyond funding, crowdfunding can also validate market interest and create a base of early adopters.

## **E. Venture Capital and Angel Investors**

Venture capital (VC) and angel investors provide funding to businesses with high growth potential in exchange for equity. These investors often bring strategic guidance, industry expertise, and networks in addition to capital. They expect significant returns on investment, typically through the eventual sale of the company or public offering.

### **Pro and Cons<sup>12</sup>**

<b>Sources of financing</b>	<b>Pros</b>	<b>Cons</b>
<b>Equity financing</b>	<ul style="list-style-type: none"><li>• No repayment required</li><li>• Access to investor expertise and networks</li><li>• Shared financial risk</li></ul>	<ul style="list-style-type: none"><li>• Dilution of ownership and control</li><li>• Investors may influence business decisions</li><li>• Potential pressure to deliver high returns</li></ul>
<b>Debt financing</b>	<ul style="list-style-type: none"><li>• Ownership remains with founders</li><li>• Interest payments are tax-deductible</li><li>• Predictable repayment schedule</li></ul>	<ul style="list-style-type: none"><li>• Requires regular repayments</li><li>• Risk of default can affect credit rating</li><li>• Interest costs may be high</li></ul>

<sup>12</sup> Investopedia Team. (2024, October 17). What are the sources of funding available for companies? Investopedia. <https://www.investopedia.com/ask/answers/03/062003.asp>

<b>Grants &amp; Subsidies</b>	<ul style="list-style-type: none"> <li>• Non-repayable funding</li> <li>• Encourages innovation and growth</li> <li>• Can improve credibility</li> </ul>	<ul style="list-style-type: none"> <li>• Strict eligibility and reporting requirements</li> <li>• Limited availability</li> <li>• Competitive application process</li> </ul>
<b>Crowdfunding</b>	<ul style="list-style-type: none"> <li>• Can validate market interest</li> <li>• Builds a base of early supporters</li> <li>• Flexible fundraising without large investors</li> </ul>	<ul style="list-style-type: none"> <li>• May require significant marketing effort</li> <li>• Limited funding compared to traditional investors</li> <li>• Obligations to reward contributors</li> </ul>
<b>Venture Capital &amp; Angel Investors</b>	<ul style="list-style-type: none"> <li>• Access to large capital quickly</li> <li>• Strategic guidance and mentorship</li> <li>• Networking opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Partial loss of control</li> <li>• High expectations for rapid growth</li> <li>• Pressure to exit or achieve returns</li> </ul>

## 2. Characteristics of financial partners

### A. Banks and Lenders

Traditional lenders focus on the financial stability of the business. They evaluate creditworthiness, collateral, and the ability to repay loans. Terms are structured, with fixed or variable interest rates, repayment schedules, and often covenants that regulate certain business decisions. Banks are generally less involved in operational decisions but provide predictable funding.

### B. Investors (Angels and Venture Capitalists)

These partners bring both capital and expertise. They usually expect an equity share and a voice in strategic decision-making. Angels tend to invest in early-stage ventures, often providing mentorship, while venture capitalists typically invest larger sums in businesses with proven growth potential. Their involvement can accelerate growth but may influence company direction.

### C. Government Bodies

Government financial partners provide support aligned with public policy objectives, such as job creation, innovation, or regional development. Grants, low-interest loans, and tax incentives can support specific projects. Businesses must comply with reporting requirements and project milestones to maintain eligibility.

### D. Crowd Investors

Individual investors through crowdfunding platforms usually seek engagement with the product or community rather than formal influence over business decisions. This form of financing can create a committed customer base but requires careful management of expectations and transparent communication regarding progress and returns

## European Perspective: Funding tools for Entrepreneurs

Entrepreneurs in the European Union have access to several key EU-level funding instruments designed to promote innovation, competitiveness, and sustainable growth. The following programmes are among the most important for startups and small and medium-sized enterprises (SMEs):

### 1. COSME

COSME (Competitiveness of Enterprises and Small and Medium-sized Enterprises) is an EU programme that helps SMEs to grow, access finance, and expand their presence in international markets. It ran from 2014–2020 and many of its activities now continue under the Single Market Programme (SMP).

It aims to:

- Facilitate access to finance for SMEs through loan guarantees and equity facilities.
- Improve access to markets inside and outside the EU.
- Create better conditions for business competitiveness and sustainable growth.
- Encourage an entrepreneurial culture and support new business creation

**Applicants:** SMEs, entrepreneurs, and intermediary financial institutions (through which the funds are channelled)

**More info:** <https://single-market-economy.ec.europa.eu/smp>

### 2. InvestEU

The **InvestEU Programme** (2021–2027) builds on the success of the previous **European Fund for Strategic Investments (EFSI)**. It aims to mobilize **public and private investment** through EU guarantees that reduce risk for investors.

It aims to:

- Support **sustainable investment**, innovation, and job creation.
- Mobilize **private capital** for strategic EU priorities such as green transition, digitalization, and social inclusion.
- Simplify access to EU finance by combining multiple instruments under one framework.

**Applicants:** Businesses (especially SMEs and startups), public authorities, and project promoters through financial intermediaries or the EIB/EIF network.

**More info:** <https://investeu.europa.eu>

### 3. EIC Accelerator

The **EIC Accelerator**, part of the **European Innovation Council (EIC)** under **Horizon Europe**, supports **high-risk, high-impact innovations** developed by startups and SMEs. It focuses on breakthrough technologies and disruptive business models with strong market potential.

**Main Objectives:**

- Help innovative SMEs **develop and scale up** new technologies.
- Bridge the gap between **research and market**.
- Support deep-tech innovations contributing to EU priorities like the **Green Deal** and **Digital Transformation**.

**Applicants:** Startups and SMEs with disruptive, scalable innovations and strong commercialization potential.

**More info:** <https://eic.ec.europa.eu>

## Practical action points / Can I have some tips?

1. Set up simple accounting records using spreadsheets or accounting software
2. Prepare a provisional budget including fixed costs (rent, salaries) and variable costs (production, logistics).
3. Estimate revenues realistically using market research and sensitivity analysis to account for uncertainty.
4. Monitor performance monthly by comparing actual results with the budget.
5. Use key financial ratios (profit margin, liquidity ratio, break-even point) to track health and growth.
6. Plan for cash flow by projecting inflows and outflows; ensure a cash buffer for emergencies.
7. Identify financing sources (banks, investors, EU grants, crowdfunding) and align funding strategies with business goals.
8. Prepare financial documents (business plan, cash-flow forecasts, profit projections) before approaching partners

## Evaluating success /Let's evaluate what I learnt!

### Activity 1-Multiple-Choice Questionnaire

**What is the main purpose of business accounting?**

- a) To provide financial information for decision-making
- b) To track employee performance
- c) To create marketing strategies
- d) To plan office operations

**Which financial statement provides a snapshot of a company's assets, liabilities, and equity at a specific point in time?**

- a) Cash-Flow Statement
- b) Balance Sheet
- c) Profit and Loss Statement**
- d) Statement of Changes in Equity

**Which ratio measures a company's ability to cover short-term obligations with easily available assets?**

- a) Debt-to-Equity Ratio
- b) Quick Ratio**
- c) Gross Profit Margin
- d) Return on Equity

**What does the break-even point indicate?**

- a) The total revenue in a year
- b) The level of sales where revenue equals total expenses**
- c) The maximum possible profit
- d) The company's cash reserves

**Which source of financing typically does not require repayment but may dilute ownership?**

- a) Bank Loan
- b) Bond Issuance
- c) Debt Financing
- d) Equity Financing**

#### **Activity 2- True or false**

1. The break-even point is the level of sales where a business starts making a profit. – **False**
2. Cost of revenue includes direct production, labour, and distribution costs. – **True**
3. Equity financing requires repayment like a traditional loan. – **False**
4. Liquidity ratios help determine if a business can meet its short-term obligations. – **True**
5. The Statement of Changes in Equity shows how profits, losses, and shareholder actions affect company value. – **True**

## Reflection

How do financial management practices differ when operating in multiple countries, and what strategies can entrepreneurs adopt to adapt?

What are the main risks of poor financial planning for startups, and how can entrepreneurs mitigate them?

Beyond securing funding, how can financial transparency and accountability build long-term trust with international partners?

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## Tool n°1: Provisional Budget Planner.

### AIM

To help learners build a clear and realistic provisional budget for their business idea, incorporating cost estimation, resource planning, and revenue forecasting.

### LEARNING OUTCOMES

By completing this tool, learners will be able to:

- Identify and categorize fixed and variable costs.
- Estimate revenue streams and break-even points.
- Construct a simple but realistic budget for their business.
- Interpret how expenses and revenues affect overall profitability and viability.

### DURATION

45-60 minutes.

### MATERIALS

- Calculator or spreadsheet software (Excel, Google Sheets)
- Business idea description
- Cost and revenue assumptions

**Note:** The Provisional Budget Planner can be completed in Excel (recommended for automatic calculations)

### METHODOLOGY

Individual or small-group practical exercise supported by discussion and feedback.

### PROCESS

1. **Introduction**– The trainer explains the purpose of a provisional budget and introduces key terms (fixed/variable costs, revenues, profit).
2. Learners receive and review the Provisional Budget Planner template, ensuring they understand each section
3. Learners complete the expenses section of the template, listing and estimating fixed and variable costs. The trainer provides guidance and checks completeness.
4. Learners estimate and record expected revenues, noting assumptions and sales projections
5. Learners calculate total costs, total revenues, and projected profit or loss directly in the template.
6. Learners interpret their results to assess financial viability. The trainer leads a short group discussion on findings and improvements.
7. Learners adjust their budgets based on trainer or peer feedback and finalize their provisional budget

## TIPS FOR TRAINERS

- Base estimates on real data whenever possible.
- Always plan for a contingency buffer (5–10%).
- Be honest about costs you might overlook (licenses, utilities, taxes).
- Revise your budget regularly — it's a living document

## ASSESSMENT

- Completeness and realism of data.
- Logical organization of costs and revenues.
- Coherence between financial assumptions and business model.

## ANNEX

### Provisional Budget Planner

CATEGORY	DESCRIPTION	ESTIMATED COST (€)	ESTIMATED REVENUE (€)	NOTES/ ASSUMPTIONS
<b>FIXED COSTS</b> <i>(Rents, salaries, insurance)</i>				
<b>VARIABLE COSTS</b> <i>(Materials, packaging, shipping)</i>				
<b>MARKETING &amp; SALES</b>				
<b>OPERATIONS &amp; EQUIPMENT</b>				
<b>OTHER EXPENSES</b>				
<b>TOTAL COSTS</b>		<b>=SUM(...)</b>		
<b>TOTAL REVENUES</b>			<b>=SUM(...)</b>	
<b>PROJECTED PROFIT/LOSS</b>			<b>=Revenues - Costs</b>	

**Note:** For learners new to spreadsheets, the Excel formula =SUM() is used to add up a range of cells.

*Example:* typing =SUM(B2:B6) in a cell will total the numbers from cells B2 to B6 automatically.

This helps avoid manual calculation errors and allows easy adjustments when changing cost or revenue figures.

## Tool n°2: Financial Health Dashboard.

### AIM

To enable learners to analyse a company's financial performance using basic ratios and indicators, based on provided fictional financial statements.

### LEARNING OUTCOMES

By completing this tool, learners will be able to:

- Interpret financial statements to assess business health.
- Calculate profitability, liquidity, and efficiency ratios.
- Identify strengths and weaknesses in financial performance.
- Propose actions to improve financial sustainability.

### DURATION

45-60 minutes.

### MATERIALS

- Blended Learning Approach
- Learner-Centred Practice
- Reflection & Discussion

### METHODOLOGY

Individual or small-group practical exercise supported by discussion and feedback.

### PROCESS

1. The trainer presents the fictional company GreenBean Café and explains that all learners will use the same data to ensure consistency in analysis and comparison.
2. Learners review the income statement and balance sheet, ensuring they understand what each line represents.
3. Using the provided financial data, learners complete the Financial Health Dashboard template by calculating the key ratios.
4. Learners interpret their results, identifying areas of financial strength or risk. The trainer facilitates a discussion on how these ratios inform management decisions.
5. Learners propose 2–3 concrete financial improvement actions (e.g., reduce costs, improve cash collection, renegotiate loans).
6. Trainer reviews calculations, assesses interpretation quality, and encourages learners to reflect on how these tools apply to their own future business plans

### TIPS FOR TRAINERS

- Double-check calculations before interpreting results.
- Ratios should be compared to industry averages when possible.
- Discuss how financial health affects your ability to attract investors

### ASSESSMENT

- Accuracy of calculations
- Depth of analysis and interpretation
- Relevance of proposed improvement actions

## REFERENCES

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## ANNEX

### Fictional financial Statements-GreenBean Café

#### Income Statement (Year1)

ITEM	AMOUNT (€)
Sales Revenue	120,000
Cost of Goods Sold (COGS)	60,000
Gross Profit	60,000
Operating Expenses	35,000
<b>Net Profit</b>	<b>25,000</b>

#### Balance Sheet (End of Year 1)

ASSETS	AMOUNT (€)	LIABILITIES & EQUITY	AMOUNT (€)
Cash	10,000	Accounts payable	8,000
Accounts receivable	6,000	Short-term loan	5,000
Inventory	4,000	Long-term Debt	12,000
Equipment	25,000	Owner's Equity	20,000
<b>Total Assets</b>	<b>45,000</b>	<b>Total Liability &amp; Equity</b>	<b>45,000</b>

### Template: Financial Health Dashboard

Indicator	Formula	Calculation	Interpretation	Improvement Actions
Gross Profit Margin				
Net Profit Margin				
Current Ratio				
Quick Ratio				

<b>Return on Investment (ROI)</b>				
<b>Break-even Point (€)</b>				

**Solution:**

<b>Indicator</b>	<b>Formula</b>	<b>Calculation</b>	<b>Interpretation</b>	<b>Improvement Actions</b>
<b>Gross Profit Margin</b>	$(\text{Gross Profit} \div \text{Sales}) \times 100$	$(60,000 \div 120,000) \times 100 = 50\%$	Strong profit margin	Maintain supplier efficiency
<b>Net Profit Margin</b>	$(\text{Net Profit} \div \text{Sales}) \times 100$	$(25,000 \div 120,000) \times 100 = 20.8\%$	Healthy profitability	Monitor expense growth
<b>Current Ratio</b>	$\text{Current Assets} \div \text{Current Liabilities}$	$(10,000 + 6,000 + 4,000) \div (8,000 + 5,000) = 1.2$	Acceptable short-term liquidity	Improve cash reserves
<b>Quick Ratio</b>	$(\text{Current Assets} - \text{Inventory}) \div \text{Current Liabilities}$	$(20,000 - 4,000) \div 13,000 = 1.23$	Good immediate liquidity	Collect receivables faster
<b>Return on Investment (ROI)</b>	$(\text{Net Profit} \div \text{Total Investment}) \times 100$	$(25,000 \div 45,000) \times 100 = 55.5\%$	High return	Reinforce growth strategy
<b>Break-even Point (€)</b>	$\text{Fixed Costs} \div (\text{Unit Price} - \text{Variable Cost per Unit})$	$35,000 \div (5 - 2.5) = 14,000$ units	Manageable target	Increase sales volume

Total Time:

**5** hours

# Learning Unit 7

## Identifying new trends in Entrepreneurship

# Learning Unit 7: Identifying new trends in Entrepreneurship

## Definition / What is this about?

This learning unit focuses on the identification of new and emerging trends in entrepreneurship. It provides trainers with the necessary knowledge and tools to support entrepreneurship learners to strategically identify trends and changing environments and adapt to them effectively. Emerging management practices will also be explored.

## Learning Objective / What can I learn?

By the end of this unit, trainers will be able to:

- Support learners to identify tools and resources for tracking entrepreneurial trends and vocational training trends.
- Illustrate the role of digital technologies, including AI, VR, AR, in business development, content generation, customer engagement and financial forecasting
- Train learners to strategically anticipate changes in institutional and financial environments.
- Guide learners to apply strategies to adapt to changing environments.
- Outline key trends in business management practices.

## Introduction / What is included?

- Tools for tracking entrepreneurial trends and vocational training trends: News & Aggregation tools, Trend & Search Analytics tools, Industry Reports & Open Data, Professional & Community Networks, Alerts & Automation tools and Education and Training specific platforms.
- Digital Technologies (AI, VR and AR) for business development, content generation, customer engagement and financial forecasting
- PESTEL Analysis for anticipating changes in environments
- Adaptive Strategies: Business Model Canvas (BMC) with a 'resilience' lens
- Key emerging management strategies: Generative AI, Agile and Change Management, Employee Well-being and Emotional Intelligence, fostering Inclusive and Diverse Cultures, Striving for Organisational Resilience in Times of Change and Fostering a Culture of Innovation.

## Contextualization / Why do I need to invest my time on this?

This unit is essential for equipping entrepreneurship trainers with the knowledge, skills and tools to train their students to identify and adapt successfully to emerging trends in entrepreneurship, including technological advancements, changing environments and emerging management practices.

## Theoretical approach

### Tools and resources for tracking trends in entrepreneurship and vocational training

**Main idea:** There is a range of free tools and resources available that can be used to track new and emerging trends in entrepreneurship and vocational training.

Strategic Trend Monitoring involves systematically observing changes in business environments to inform decision-making. This strategic and proactive approach enables entrepreneurs to anticipate trends, monitor and adapt to new and emerging trends.

#### Tools and Resources for Trend Monitoring:

##### 1. News & Aggregation Tools:

- **Feedly** → Set up feeds on keywords like *entrepreneurship*, *vocational training*, *micro-credentials*, *blended learning*. <https://feedly.com>
- **Google News** → Track curated news by searching terms like “*future of vocational training*” or “*entrepreneurship ecosystem*”. <https://news.google.com/>
- **Flipboard** → Build a “magazine” of entrepreneurship and skills training articles. <https://flipboard.com/>



Source: <https://news.google.com>

##### 2. Trend & Search Analytics Tools

- **Google Trends** → Explore how terms like *micro-credentials*, *gig economy*, *vocational education* are gaining traction across regions. <https://trends.google.com/>
- **Exploding Topics (free tier)** → Highlights fast-growing concepts in startups, education tech, and workforce skills. <https://explodingtopics.com/>
- **Think with Google** → Consumer and education insights, often highlighting skills and workforce development needs. <https://www.thinkwithgoogle.com/>



Source: <https://explodingtopics.com>

##### 3. Industry Reports & Open Data (Free Access Sections)

- **OECD iLibrary (free summaries)** → Reports on education, entrepreneurship, and training policies. <https://www.oecd-ilibrary.org/>
- **World Bank Open Knowledge Repository** → Data and reports on skills, jobs, and entrepreneurship ecosystems. <https://openknowledge.worldbank.org/>
- **UNESCO-UNEVOC** → Publications on Technical and Vocational Education and Training (TVET). <https://unevoc.unesco.org/>
- **World Economic Forum (Future of Jobs Report)** → Covers entrepreneurship, digital skills, and vocational education trends. <https://www.weforum.org/reports>

Source: <http://openknowledge.worldbank.org>

#### 4. Professional & Community Networks

- **Online Forums (knowledge sharing & networking):**

**LinkedIn Groups** → e.g., *Entrepreneurship Development, TVET Forum, Future of Skills & Learning*. <https://www.linkedin.com/groups/>

**Reddit Communities** → r/Entrepreneur, r/Vocational Training, r/Futurology (for signals on skills shifts). <https://www.reddit.com/>

**Quora** → Discussions on entrepreneurship challenges and training innovations. <https://www.quora.com/>

- **Conferences & Events** → Attend industry conferences and events to stay updated on the latest developments, gain insights from industry experts and firsthand exposure to emerging trends. <https://www.eventbrite.com>



Source: [LinkedIn Brand Guidelines | LinkedIn Logo](#)

#### 5. Alerts & Automation Tools

- **Google Alerts** → Get notified about new articles (e.g., “entrepreneurship in Africa 2025” or “vocational training trends”). <https://www.google.com/alerts>
- **Talkwalker Alerts** → More comprehensive coverage of web and social media mentions. <https://www.talkwalker.com/alerts>



Source: <https://www.google.com/alerts>

#### 6. Education & Training-Specific Platforms

- **Coursera Blog & Research Reports** → Regular insights on online learning, micro-credentials, and blended learning. <https://www.coursera.org/>
- **edX Insights** → Trends in vocational and continuing education. <https://blog.edx.org/>



Source: <https://www.coursera.org>

## Digital Innovation and Entrepreneurship



Source: [Download Cyber Glasses, Cyber, Glasses. Royalty-Free Stock Illustration Image - Pixabay](#)

**Main Idea:** Entrepreneurs can make use of digital technologies such as AI, VR and AR to enhance business development, content creation, customer engagement and financial forecasting.

Digital Technologies are transforming entrepreneurship. They have reduced the barriers to becoming an entrepreneur in the first place, and are reshaping how businesses grow, communicate and make strategic decisions. Among the most impactful are Artificial Intelligence (AI), Virtual Reality (VR), and Augmented Reality (AR), with each one enabling innovation in its own unique way.

**Artificial Intelligence (AI)** refers to computer systems that are capable of performing tasks which would have usually required human intelligence, such as analysing data and making predictions.

**Virtual Reality (VR)** is an immersive technology that simulates a digital environment where users can interact through specialised devices like VR headsets. It is widely applied in training, product demonstrations, and virtual experiences.

**Augmented Reality (AR)** overlays digital information or objects onto the real world, typically through smartphones or AR glasses. It enhances real-world interactions with interactive and visual layers, especially valuable in customer engagement.

AI, VR and AR are integral to entrepreneurship. They empower entrepreneurs to innovate, engage, and grow. These digital technologies are applied in areas such as Business Development, Content Generation, Customer Engagement and Financial Forecasting in the following ways:

Area	AI	VR	AR
<b>Business Development</b>	Predictive lead scoring, automatic prospecting, tailoring outreach	Virtual trade shows, immersive product demos, employee training	Interactive sales presentations, product visualisation in client's environment
<b>Content Generation</b>	Automated copy, reports, website design, and video creation	Immersive storytelling, virtual product launches	Interactive ads, gamified content, "try-before-you-buy" campaigns

<b>Customer Engagement</b>	Chatbots, personalised recommendations, voice assistants, customer support	Virtual stores/showrooms, interactive brand experiences	AR try-ons, real-world product visualisation, interactive customer touchpoints
<b>Financial Forecasting</b>	Predictive analytics, risk assessment, anomaly detection	3D visualization of financial data, immersive dashboards	Interactive overlays on financial reports, real-time decision support

### Anticipating changes in institutional and financial environments and identifying strategies to adapt

**Main idea:** Anticipating and adapting to changing institutional and financial environments requires building awareness of external forces and practical adaptive strategies.

Tools and frameworks for anticipating change:

#### PESTEL Analysis

A PESTEL Analysis, which refers to Political, Economic, Social, Technological, Environmental and Legal factors, is a valuable tool for entrepreneurs in analysing the issues that could impact their business. It provides a structured approach for identifying opportunities and threats.

<b>P</b>	<b>E</b>	<b>S</b>
<b>Political</b>	<b>Economic</b>	<b>Social</b>
Governmental policies, Political stability or instability, Environmental law, Tariffs, Trade restrictions, Foreign trade policies, Labour law, Tax policy, Political trends.	Growth, Interest rates, Exchange rates, Inflation rate, Consumer confidence, Unemployment rates, Economic Performance, Discretionary income.	Cultural aspects, Population analytics, Demographics, Societal trends, Lifestyle influences.
<b>T</b>	<b>E</b>	<b>L</b>
<b>Technological</b>	<b>Environmental</b>	<b>Legal</b>
Automation, Research & Development, Technology incentives, the rate of Technological Change, the Adoption of technology.	Weather, Climate, Climate change, Climate change policies.	Current and impending business legislation, Regulatory framework.

### Trend Spotting Techniques

Use the tools for tracking trends such as scanning news, policy announcements, industry reports and financial indicators! See **Tools and resources for tracking trends in entrepreneurship and vocational training**

Adaptive Strategies:

**Adaptation Mindsets:** Resilience comes from mindset as much as strategy:

*Growth mindset:* Seeing changes as opportunities, not just threats

Practical Tools for Strategic Adaptation:

**Business Model Canvas (BMC) with a 'resilience' lens:** Explore how each component of the BMC might be disrupted and adapted. (See learning unit 2 for an introduction to the BMC and official template)

**Ensure financial literacy for 'emergencies':** Cash flow management, building reserves, accessing alternative financing (microfinance, crowdfunding, impact investors)

**Regulatory adaptation strategies:** Compliance mapping, lobbying, partnerships with associations.

**Digital adaptation:** Using tech to pivot quickly.

**Join entrepreneurial networks:** Stay informed of policy changes.

**Develop peer and mentor networks:** collective sensemaking when environments shift.

**Engage financial actors:** maintain relationships with banks and investors to anticipate shifts early.

## Emerging management practices

**Main idea:** Technological advancements and innovative organisational practices are reshaping business management practices. Understanding and embracing these emerging trends can give entrepreneurs a competitive edge.

### Generative Artificial Intelligence (AI)

**Generative AI** is redefining how businesses operate by streamlining processes and enabling greater efficiency. One of its key functions is the automation of repetitive and data-intensive tasks, such as analysis and reporting. By delegating these tasks to AI, managers can dedicate more time to strategic thinking and creative problem-solving. The integration of AI fosters innovation and delivers tangible benefits, including:

- Increased productivity
- More informed and timely decision-making
- Enhanced collaboration across teams
- Savings in both time and financial resources

### Agile and Change Management

As hybrid working models become increasingly common, organisational agility has emerged as an essential management capability. Traditional project management methods, such as the *Waterfall methodology*, follow a rigid, step-by-step sequence that often struggles to adapt to changing conditions. In contrast, **Agile methodology** prioritises flexibility, customer focus, and incremental delivery through sprints. It places emphasis on collaboration, self-organising teams, continuous improvement, and adaptability.

While Agile practices enhance responsiveness and adaptability, **change management** equips organisations with structured approaches to guide employees through new systems, processes, or

cultural shifts. Together, Agile and change management enable organisations to remain flexible while effectively navigating transition and transformation.

### **Employee Well-being and Emotional Intelligence**

The Covid-19 pandemic accelerated the adoption of remote and hybrid work arrangements, bringing employee well-being to the forefront of management practices. Even as organisations transition to hybrid models, supporting the health, balance, and engagement of employees remains a priority.

Closely linked to this is the role of **emotional intelligence (EI)** in leadership. Managers and entrepreneurs who demonstrate high EI are better equipped to build trust, communicate effectively, and support the well-being of their teams. Developing EI through training and education is essential for fostering resilience, work-life balance, open communication, and employee satisfaction.

### **Fostering Inclusive and Diverse Cultures**

An inclusive and diverse organisational culture is now widely recognised as a driver of business success. Workplaces that embrace diversity of age, background, and culture create opportunities for learning, innovation, and knowledge sharing. Ensuring that all individuals feel valued and included strengthens employee engagement and contributes to sustainable growth.

### **Striving for Organisational Resilience in Times of Change**

In today's rapidly evolving business landscape, organisational resilience has become a critical factor for long-term success. Entrepreneurs and their ventures must remain responsive to emerging trends, open to innovation, and agile in their operations. Resilience enables organisations not only to withstand uncertainty but also to leverage change as an opportunity for growth.

Organisational resilience is not merely a theoretical concept but a strategic necessity. By embedding resilience into their leadership and operations, entrepreneurs can equip their organisations to manage uncertainty, capitalise on opportunities, and achieve sustainable growth in a constantly changing business environment

### **Fostering a Culture of Innovation**

Innovation is central to building resilience. Companies that encourage creativity, experimentation, and collaborative problem-solving are more capable of responding effectively to market fluctuations. By nurturing an innovative mindset, entrepreneurs enable their organisations to continuously improve, differentiate themselves, and stay ahead of industry rivals.

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ESOFTlearning, 2024. Emerging trends shaping management practices. [What emerging trends are shaping management practices in 2024? - ESOFT Lifelong Learning](#)

## Practical action points / Can I have some tips?

- Ensure learners have a clear understanding of the Main ideas presented in the theoretical approach
- Support learners to develop their knowledge in a learner-centred, needs-based, supportive, inclusive and engaging learning environment.
- Use the theoretical information to help inform the activities provided in the toolbox.

## Evaluating success /Let's evaluate what I learnt!

### Activity 1.

#### 1.Strategic Trend Monitoring involves:

a/ creating short-term sales campaigns to boost quarterly revenue

**b/ systematically observing changes in business environments to inform decision-making**

c/ ignoring external market shifts and focusing only on internal processes

#### 2.News & Aggregation Tools are primarily used to:

a/ randomly collect articles without filtering or relevance

**b/ organise and track information on specific topics (e.g., entrepreneurship, vocational training, micro-credentials) from multiple sources**

c/ replace all forms of professional research and decision-making

#### 3. Trend & Search Analytics Tools are mainly used to:

**a/ analyse rising interest and patterns in search behaviour across regions and industries**

b/ automatically generate complete business strategies without human input

c/ limit access to information so organizations cannot identify new opportunities

#### 4.Alerts & Automation Tools are primarily designed to:

a/ automatically write and publish news articles without user input

b/ block access to online information to reduce research workload

**c/ provide real-time or scheduled notifications about new content and mentions on chosen topics**

### Activity 2:

1. Artificial Intelligence (AI) can help entrepreneurs analyse data and make predictions that would normally require human intelligence. **T/F**
2. Virtual Reality (VR) overlays digital information onto the real world through smartphones or AR glasses. **T/F**
3. Digital technologies like AI, VR, and AR have lowered barriers to entrepreneurship and reshaped how businesses grow and engage with customers. **T/F**
4. AI is used for predictive lead scoring, automatic prospecting, and tailoring outreach. **T/F**
5. AR can be used for interactive ads, gamified content and “try-before-you-buy” campaigns. **T/F**

### Activity 3:

1. Which of the following is the main purpose of a PESTEL Analysis for entrepreneurs?

- a/ To track daily sales performance
- b/ To analyse external factors such as political, economic, social, technological, environmental, and legal influences**
- c/ To design marketing campaigns for social media
- d/ To hire staff more efficiently

2. Which of these is an example of an adaptive financial strategy for entrepreneurs facing changing environments?

- a/ Ignoring cash flow during economic uncertainty
- b/ Building financial reserves and exploring alternative financing (e.g., crowdfunding, microfinance)**
- c/ Relying solely on government funding
- d/ Avoiding relationships with investors

3. Trend spotting techniques for anticipating changes include:

- a/ Scanning news, policy announcements, industry reports, and financial indicators**
- b/ Waiting for competitors to report trends
- c/ Focusing exclusively on internal business data
- d/ Ignoring regulatory or market shifts

4. Which mindset is most aligned with effective adaptation to changing institutional and financial environments?

- a/ Fixed mindset – avoiding change at all costs
- b/ Growth mindset – seeing changes as opportunities rather than threats**
- c/ Pessimistic mindset – expecting failure in all ventures
- d/ Passive mindset – waiting for circumstances to stabilise

### Activity 4:

1. Generative AI can automate repetitive and data-intensive tasks, allowing managers to focus more on strategic thinking and creative problem-solving. **T/F**
2. Agile methodology follows a rigid, step-by-step process that is less flexible than traditional Waterfall methods. **T/F**
3. Employee well-being and emotional intelligence are no longer considered important in hybrid work environments. **T/F**
4. Inclusive and diverse organisational cultures can enhance learning, innovation, and employee engagement. **T/F**
5. Organisational resilience helps companies not only survive uncertainty but also leverage change as an opportunity for growth. **T/F**

## Reflection

1. Have you learnt any new strategies for how entrepreneurs can track and adapt to emerging trends, changing environments and emerging management practices in entrepreneurship?
2. Which of the strategies explored are the most crucial for entrepreneurs? Why?

## Tool n°1: Strategic Trend Monitoring.

### AIM

The aim of this exercise is to show learners how to strategically monitor emerging trends in entrepreneurship and vocational training.

### LEARNING OUTCOMES

Participants will be equipped with the knowledge and skills to support entrepreneurship learners to identify and make use of various different free tools and resources to discover new trends in entrepreneurship and in vocational training.

### DURATION

75 minutes.

### MATERIALS

- 6 computers/ laptops/ tablets
- A copy of each tool type and examples, cut out ready to give one to each group (Process step 2). See Theoretical Approach for the content for this handout.
- 1 Handout (providing details of the 6 tool types. (Process step 5). See Theoretical Approach for the content for this handout.

### METHODOLOGY

This exercise is based on experiential and active learning. Learners will actively explore tools for monitoring emerging trends and reflect on their effectiveness. They will reflect on the effectiveness of the tools and engage in a group discussion to share their thoughts with their peers. It also aligns with EntreComp dimensions: Ideas and Opportunities, Resources and Into Action.

### PROCESS

1. Introduce the aim of the lesson and ask learners if they know of any digital tools or resources for tracking emerging trends, for example professional and community networks such as LinkedIn and reddit communities.
2. Discuss their ideas and then explain the task: Learners will be divided into small groups (there should be 6 groups in total). Explain you will give them a tool type each with examples of related tools and resources. Learners should explore the tools they have been given and find 1 trend in entrepreneurship and 1 trend in vocational training using each sub-tool.
3. Provide learners with 30 minutes to fulfil this task and to prepare a presentation to their peers where they will:
  - a) Introduce their tool type and example tools and resources.
  - b) Provide an overview of how they work/ why they are useful.
  - c) Present the emerging trends about entrepreneurship and vocational training they discovered.
4. Group discussion: Facilitate a group discussion about the effectiveness of the tools, which tools they will use from now on, which tools they are less likely to use, and why
5. Provide learners with a handout containing information on the 6 tool types. Set the task that learners spend 15 minutes per week scanning for emerging trends in entrepreneurship and vocational training using the tools of their choice. They should try to use a different tool each

week. Encourage learners to note down their findings in their learning journal and reflect on the effectiveness of the tool used and the impact of the trends they read about.

6. Reflection: Ask learners to reflect on the activities used in this lesson. What worked well? What could be improved? How methods would they use to teach this subject?
7. Finish with an assessment using the questions provided in the introduction to this learning unit.

### TIPS FOR TRAINERS

Encourage learners to explore each tool carefully and note its strengths and weaknesses as well as any emerging trends they find out.

Motivate learners to continue using the tools frequently in their own time to keep updated on emerging trends in entrepreneurship.

The Process Steps are a guide. Adapt the process as necessary to suit learners' needs.

Process step 6: Encourage learners to reflect on the different teaching activities used within the lesson and share how they might adapt these to suit their learners' needs.

### ASSESSMENT

Learning can be assessed according to the following criteria:

Well-thought-out presentation of the tools - strengths and weaknesses, and emerging trends discovered.

### REFERENCES

- Chaudhary, 2024. Medium. 11 Best Trend Tracker Tools that'll help you monitor latest trends in 2024. 11 Best Trend Tracker Tools That'll Help You Monitor Latest Trends In 2024 | by Suresh Chaudhary | Medium
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## Tool n°2: Leveraging digital technologies for business development and transformation.

### AIM

To help learners understand the significance of digital technologies, including AI, VR and AR in business development, content generation, customer engagement and financial forecasting.

### LEARNING OUTCOMES

Participants will be able to guide entrepreneurship learners to recognise the significance of digital technologies, including AI, VR and AR, in business development, content generation, customer engagement and financial forecasting.

### DURATION

75 minutes.

### MATERIALS

- 4 role cards: See process step 2.
- 4 laptops for conducting online research.

### METHODOLOGY

This exercise is based on experiential and collaborative learning. Learners also engage in discussion and reflection. It also aligns with EntreComp dimensions: Ideas and Opportunities, Resources and Into Action.

### PROCESS

1. Introduce the subject of the activity and elicit examples of AI, VR and AR relevant to entrepreneurs - digital technologies that are transforming entrepreneurship.
2. Divide the group into 4 groups and ask them to think of an idea for a business. Give them a role card each: 1/ Business Development: How could you use digital technology to find new customers for your start-up? 2/ Content Generation: How can you make content more engaging for customers using AI, VR and AR? 3/ Customer Engagement: How could you create an interactive customer experience with AI, VR and AR? 4/ Financial Forecasting: How can digital technology help you make better predictions and financial decisions?  
Learners work in their groups to research and find one concrete example per digital tool for their scenario (for example, AI for customer service, and decide how they would implement each tool in their business and what the potential impact would be.
3. Presentations: Each group presents how they would use the digital tools in their business idea.
4. Reflection and discussion: Which tools stood out as being particularly effective? Which tool was easiest to integrate? Why? How can you simplify these tools for learners with little tech knowledge? What teaching strategies might you employ in your own classroom to introduce these tools to your learners?
5. Learners complete the assessment questions featured in the introduction to this unit.

### TIPS FOR TRAINERS

Encourage learners to use the internet to conduct research about the tools and how they could use them in their scenario.

Provide a supportive and inclusive learning environment.

Encourage learners to reflect on the ideas presented by the other groups.

The Process Steps are a guide. Adapt the process as necessary to suit learners' needs.

## ASSESSMENT

Learning can be assessed according to the following criteria:

Well-thought-out presentation of the digital tools potential and how the tools can be used in the learners' given scenarios.

Contribution to reflection discussion in process step 4.

## REFERENCES

- Mccall, A, 2024. Augmented Reality (AR) and Virtual Reality (VR) in Business Information Systems. Research Gate. [\(PDF\) Augmented Reality \(AR\) and Virtual Reality \(VR\) in Business Information Systems](#)
- Rashid, A. Kausik, MD. 2024. AI revolutionizing industries worldwide: A comprehensive overview of its diverse applications. Science Direct. [AI revolutionizing industries worldwide: A comprehensive overview of its diverse applications - ScienceDirect](#)

## Tool n°3: Anticipating changes in institutional and financial environments and identifying strategies to adapt.

### AIM

To help learners anticipate changes in institutional and financial environments and identify strategies to adapt.

### LEARNING OUTCOMES

Participants will be able to guide entrepreneurship learners to anticipate changes in institutional and financial environments and identify strategies to adapt.

### DURATION

90 minutes.

### MATERIALS

- PowerPoint slide showing the PESTEL framework (See Theoretical Framework)
- Business Model Canvas template.

### METHODOLOGY

This exercise is based on experiential learning and uses adaptive strategy simulation to provide learners with 'real' practice of adapting business ideas because of anticipated changes. This methodology supports critical thinking, creativity, and collaboration. It also aligns with EntreComp dimensions: Ideas and Opportunities, Resources and Into Action.

### PROCESS

1. Ask learners to think of a time when a regulation, bank policy or financial shift disrupted a business they know. What happened? Were they able to adapt? Obtain feedback.
2. Review the PESTEL framework – elicit what learners know and present what they don't. (Have the framework on a PowerPoint slide ready to present)
3. Ask for examples for each section to check learners' understanding, such as, how a Circular Fashion enterprise would need to keep abreast of policy on textiles and waste.
4. Divide learners into 6 groups and provide them with a Business Canvas Model template. Ask groups to come up with a business idea and fill out the BMC together.
5. Next, each group should look at the PESTEL and anticipate 1 potential change per section that could happen to their business.
6. Using this information, learners should adapt their BMC.
7. Presentation: Learners present their original BMC, the changes they anticipated and how they adapted their BMC as a result.
8. Reflection: Discuss which groups anticipated and adapted effectively.
9. Reflection: Ask learners to reflect on the activities used in this lesson (particularly the Adaptive Strategy simulation). Was it effective? What could be improved? How methods would they use to teach this subject?
10. Finish with an assessment using the questions provided in the introduction to this learning unit.

### TIPS FOR TRAINERS

Provide a supportive and inclusive learning environment.

Encourage learners to reflect on the anticipated changes and adaptive strategies presented by the other groups. The Process Steps are a guide. Adapt the process as necessary to suit learners' needs.

Process step 9: Encourage learners to reflect on the different teaching activities used within the lesson and share how they might adapt these to suit their learners' needs.

## ASSESSMENT

Learning can be assessed according to the following criteria:

Well-anticipated changes and adaptive strategies presented.

## REFERENCES

- FasterCapital, 2025. PESTEL analysis model: Unleashing entrepreneurial potential: PESTEL analysis for Startups. [PESTEL analysis model: Unleashing Entrepreneurial Potential: PESTEL Analysis for Startups - FasterCapital](#)
- Strategyzer, 2025. The Business Model Canvas. [Business Model Canvas – Download the Official Template](#)

## Tool n°4: Harnessing emerging management practices in entrepreneurship.

### AIM

To help trainers of entrepreneurship learners internalise the concepts of emerging management practices and develop strategies to teach these concepts in an interactive, learner-centred way.

### LEARNING OUTCOMES

Learners will be able to provide training to entrepreneurship students on emerging management practices and their significance for entrepreneurs.

### DURATION

60 minutes.

### MATERIALS

- 5 laptops for conducting research and preparing PowerPoint slides
- A projector that can be connected to the laptops.

### METHODOLOGY

This exercise is learner-centred and collaborative. Learners work together to research and prepare a presentation. It involves team work, organisational skills and creativity. It also aligns with EntreComp dimensions: Ideas and Opportunities and Into Action.

### PROCESS

1. Introduce the topic and ask learners to brainstorm any emerging trends or innovations they've noticed in management practices.
2. Research and Presentation:
3. Learners are divided into 5 groups. Each group is given one of the management practices below. They should spend 20 minutes conducting research, finding examples of good practice, etc and prepare a formal and engaging presentation of their topic to the group using PowerPoint.
  - a. Generative AI
  - b. Agile and Change Management
  - c. Employee well-being and AI
  - d. Inclusive & Diverse cultures
  - e. Organisational Resilience & Innovation
4. After each presentation, engage learners in a discussion about the benefits of these management practices in entrepreneurship.
5. Ask learners to reflect on what teaching activities or methodologies they would use to teach the concepts to their entrepreneurship learners.
6. Finish with an assessment using the questions provided in the introduction to this learning unit.

### TIPS FOR TRAINERS

Provide a supportive and inclusive learning environment.

Encourage learners to brainstorm teaching activities they might use to introduce emerging management practices with their learners.

The Process Steps are a guide. Adapt the process as necessary to suit learners' needs.

## ASSESSMENT

Learning can be assessed according to the following criteria:

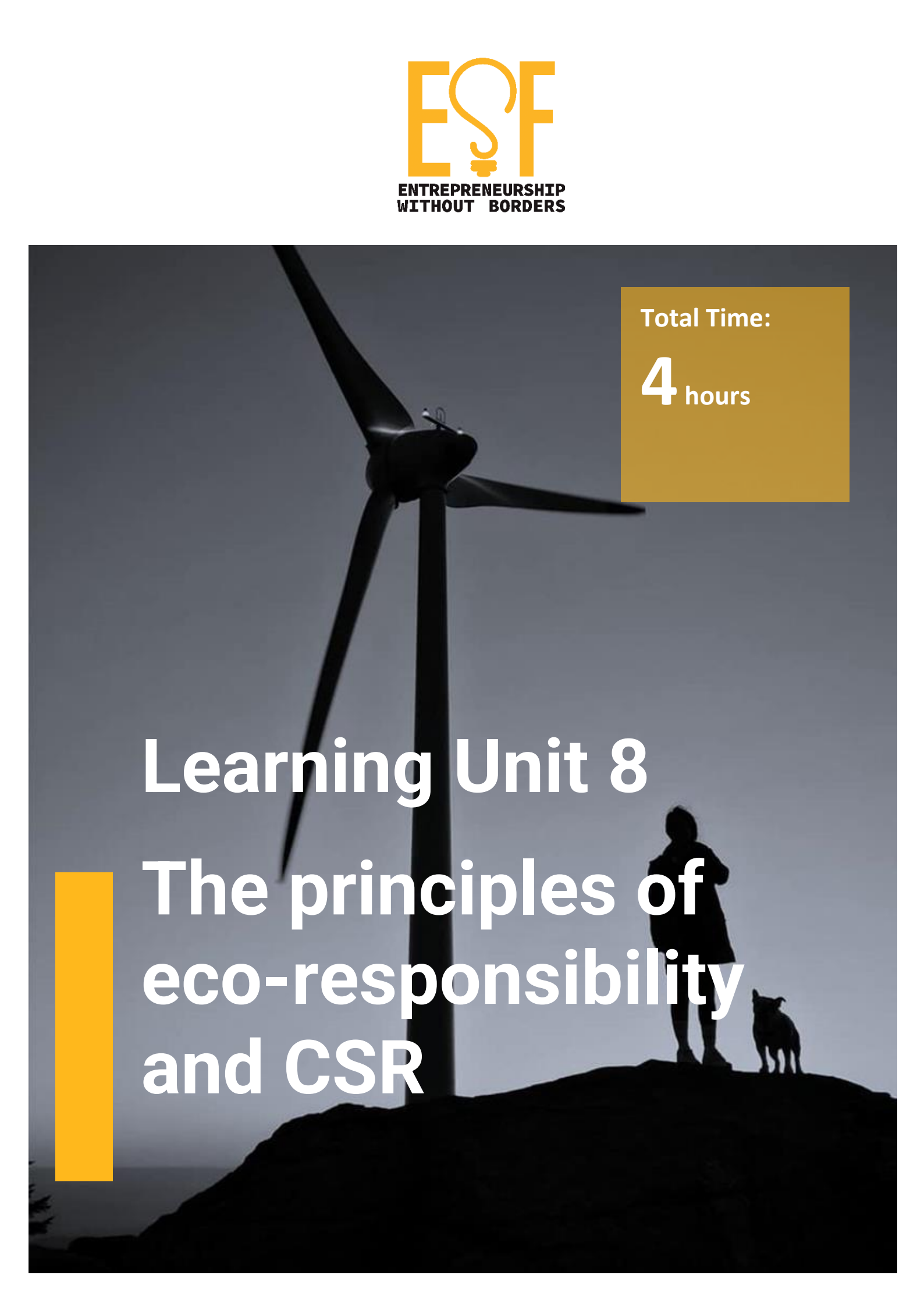
Research and presentation skills demonstrated.

## REFERENCES

- ESOFlearning, 2024. Emerging trends shaping management practices. [What emerging trends are shaping management practices in 2024? - ESOF Lifelong Learning](#)

Total Time:

**4** hours



# Learning Unit 8

## The principles of eco-responsibility and CSR

# Learning Unit 8: The principles of eco-responsibility and CSR

## Definition / What is this about?

This unit aims to develop the skills of business start-up trainers to enable them to support entrepreneurial learners in becoming aware of the environmental and social impact of their activity and in formalising specific commitments as part of a CSR approach applied to very small or micro-enterprises.

## Learning Objective / What can I learn?

By the end of this unit, participants will be able to:

- Explain the principles of sustainable development as applied to the business world in Europe.
- Discuss the entrepreneur's concerns and attitude in this context.
- Outline the general principles of CSR and be able to explain how they apply to small/micro-enterprises.
- Illustrate the main methods and solutions available to entrepreneurs for the three pillars of CSR.
- Explain the progressive, evolving nature of a CSR approach and the need to set objectives that are compatible with the company's development.
- Support learners to understand and express the value of an eco-responsible approach for their company.
- Enable learners to formulate at least 3 clear, realistic and planned CSR commitments

## Introduction / What is included?

1. The principles of corporate eco-responsibility?
  - a. Key definitions of sustainable development
  - b. The impact of an activity: ecological footprint / carbon footprint
  - c. Why everyone has responsibilities
2. The principles of environmental management and CSR
  - a. What is it?
  - b. The benefits of a CSR approach
  - c. Acting methodically
  - d. Acting with stakeholders
3. Putting the entrepreneur's commitments into practice
  - a. Applying the principles of the circular economy
  - b. Developing an environmental quality approach
  - c. Combat waste
  - d. Optimising energy policy
  - e. Translate commitments into voluntary action

## Contextualisation / Why do I need to invest my time in this?

For most aspiring entrepreneurs, future managers of self-employed businesses, micro-businesses or very small businesses, the entrepreneur's environmental and social commitment is a distant concern, which primarily affects larger companies but will not affect them until they have stabilized their project.

With the support of this learning unit, the business start-up trainer must find the right arguments and tools to enable their learners to understand that CSR commitments concern all economic actors, including the smallest ones.

Beyond understanding the theoretical concepts behind CSR, trainers should use this training unit to develop practical facilitation tools that enable learners to identify the challenges for their activities and define concrete solutions as part of an evolutionary and coherent approach.

## Theoretical approach

### 1. The principles of corporate eco-responsibility

#### 1.1. Key definitions of sustainable development

##### **Sustainable development:**

Official definition (UN, 1987): "Development that meets the needs of the present without compromising the ability of future generations to meet their own needs."

The principle of sustainable development is based on three interconnected pillars:

Environmental: Preservation of ecosystems, reduction of pollution.

Social: Equity, quality of life, respect for human rights.

Economic: Financial viability, creation of shared value.

The trainer should emphasise that the concept of sustainable development is based on a balanced compromise between these three pillars, a compromise that remains difficult to achieve in most "real-life" situations.

Concrete example: A textile company that uses organic cotton (environment), pays its workers above the local minimum wage (social), and achieves stable turnover (economic) while also engaging in social initiatives in its local area (sponsorship of associations or distribution of stock and unsold items to people in precarious situations, etc.).



Fig 1 - The principle of sustainable development – Source dreamstime.com

### **Eco-responsibility:**

Integration of environmentally friendly practices into the company's strategy and operations. The concept of eco-responsibility is more limited than that of sustainable development, as it focuses primarily on the environmental impact of the business. An eco-responsible company does not necessarily seek the balanced compromise on which the concept of sustainable development is based.

Example: A bakery that buys its flour locally, uses compostable packaging, and optimises its delivery routes to reduce its CO<sub>2</sub> emissions.

### **1.2. The impact of an activity: ecological and carbon footprint**

The idea is to help learners understand that all productive activities have an impact, to a greater or lesser extent, and that therefore, anyone responsible for these activities can help to reduce this impact. The trainer can, of course, introduce the idea that impacts vary in significance depending on the type of activity, the size of the company, etc. However, each stakeholder (public actor, entrepreneur, citizen, etc.) is likely to propose commitments in proportion to the impact of their activity.

To measure and illustrate the environmental impact of an activity, the concepts of ecological footprint or carbon footprint are commonly used. These two concepts are "theoretical" and their calculations involve a number of shortcuts, but they easily illustrate the impact of our activities.

#### **Ecological footprint:**

Measures the pressure exerted by humans on natural resources.

Calculation: (Area needed to produce the resources consumed) + (Area needed to absorb waste).

Key data: In 2023, humanity consumed the equivalent of 1.7 Earths in terms of resource consumption and waste production (Global Footprint Network). If everyone lived like a European, it would take between 2.5 and 3 planets to meet humanity's needs.

#### **Carbon footprint:**

Amount of greenhouse gases (GHG) emitted, expressed as CO<sub>2</sub> equivalent mass per unit of measurement (one person, one kilogram of material, etc.).

CO<sub>2</sub> emitting sectors: Transport (30%), industry (20%), agriculture (20%), construction (20%).

Example: An e-commerce company that delivers within 24 hours (air transport = 500 g CO<sub>2</sub>/kg of goods) vs. grouped delivery by lorry (50 g CO<sub>2</sub>/kg of goods).

To accompany the introduction of these concepts, the trainer can present a carbon footprint estimation application. There are many available in Europe:

[In French](#); [In English](#); [In German](#); etc. The trainer can find the one on the web that is best suited to their context and the language of their learners. They can introduce a short activity to estimate a simplified carbon footprint, for example for each learner.

### 1.3. Why does everyone have responsibilities?

#### 1.3.1 Current regulations

The responsibility of citizens and economic actors is not based solely on voluntary action: national and European regulations impose standards and objectives. The trainer will give a very brief overview of the main texts in force.

##### a. Key European regulations

###### European Green Deal (2019):

Objective: Carbon neutrality by 2050.

Measures: Green taxonomy (classification of sustainable activities), ban on unsustainable products.

###### CSRD Directive (Corporate Sustainability Reporting Directive, 2023):

All listed companies and large companies (including non-European companies operating in the EU) must publish a detailed CSR report. ESG standards: Obligation to report on standardised indicators (environmental, social, governance).

Timeline: Gradual implementation starting in 2024. Discussions are ongoing regarding adjustments and postponements.

##### b. National regulations

The trainer will summarise the main regulations in force in their country to outline the guidelines that apply at national level, particularly in application of European regulations.

#### 1.3.2 Stakeholder expectations

In addition to regulations, commitments to greater eco-responsibility and ethics on the part of companies also stem from demands from consumers, financiers and company employees.

##### a. Consumer expectations

Key figures to discuss with learners:

68% of French people say they boycott unethical brands (GreenFlex-ADEME barometer, 2024) - 73% of Europeans are willing to pay more for sustainable products (Eurobarometer, 2023) - 50% of French consumers say they check environmental labels before buying (Kantar, 2023).

We are seeing a steady shift in consumer behaviour, even if economic and geopolitical crises are slowing down these trends:

Short supply chains: +30% increase in visits to AMAPs and local markets since 2020.

Second-hand: The second-hand market is worth €7 billion in France (ADEME, 2023).

Transparency: Consumers demand clear information about the origin of products and their impact (e.g. carbon score, reparability index).

## b. Investor expectations

Key figures to discuss with learners

40% of investments in Europe are now ESG (Environmental, Social, Governance) funds - Companies committed to CSR have a 10-15% lower cost of capital (PwC study, 2023) - "Green" funds grew by 50% between 2020 and 2023 (Morningstar).

### ESG criteria:

ESG (Environmental, Social, Governance) criteria are a set of standards used to assess the sustainability and ethical impact of a company or investment. They enable investors, consumers and regulators to evaluate an organisation's non-financial performance.

- **E (Environment):** The company's impact on the planet (CO<sub>2</sub> emissions, waste management, biodiversity, etc.).
- **S (Social):** Relations with employees, customers, suppliers and local communities (working conditions, diversity, inclusion, etc.).
- **G (Governance):** Quality of corporate management (transparency, ethics, executive compensation, anti-corruption, etc.).

Since 2023, the CSRD (Corporate Sustainability Reporting Directive) has required the largest companies (more than 250 employees, turnover > £40 million, balance sheet > £20 million) to publish standardised ESG reports.

## c. Employee expectations

Key figures:

75% of young graduates favour companies committed to CSR (LinkedIn study, 2023).

60% of employees are more motivated in an eco-responsible company (Malakoff Humanis barometer, 2024).

### Specific expectations:

Quality of life at work: Green spaces, remote working, flexible hours.

Training: Awareness of environmental and social issues.

Involvement: Participation in CSR decisions (e.g. collaborative workshops).

## 2. The principles of environmental management and CSR applied to small businesses

### 2.1. What is CSR?

#### Definition:

CSR is the voluntary integration of social and environmental concerns into business activities and their relationships with stakeholders (definition from ISO 26000). The trainer should draw parallels with the principles of sustainable development outlined above: it is about building a compromise in the management of the company, in conjunction with the stakeholders in the company's activities.

The trainer is advised to emphasize several points:

- The voluntary and customisable nature of the approach: this is not a legal obligation but a commitment on the part of the company, adaptable to its specific sector of activity. There is no ready-made answer or pre-formatted tool for developing a CSR approach.
- The evolving nature of the approach: the CSR approach is organised over time, with regularly revised objectives and planned implementation, depending on the company's capabilities.
- The need for compromise: a company, particularly a micro-enterprise, is subject to multiple parameters that change over time (raw material prices, financial constraints, changes in consumer demand, etc.). The company manager must juggle all these parameters and adjust its CSR approach according to them so that it does not threaten the viability of the company.
- The need to communicate about commitments made and progress achieved: to teams, partners, customers, etc.

The seven key questions at the heart of the CSR approach:

1. Organisational governance.
2. Human rights.
3. Working conditions and relations.
4. Environment.
5. Fair practices.
6. Consumer issues.
7. Communities and local development.

The ISO 26000 standard establishes the normative process for implementing a CSR approach. It lists seven key areas of intervention. Even if not all SMEs are in a position to apply the recommendations of this standard in their entirety, trainers are encouraged to familiarise themselves with it and recommend that learners read it as a methodological tool to support the implementation of the CSR approach.

## **2.2. The advantages of a CSR approach**

### **Economic benefits:**

Cost reduction: Less raw materials, fewer consumables (water, energy), less waste, less wastefulness = lower expenses.

Subsidies: Aid for ecological transition (public subsidies, private contributions, loans, microcredit for investments, etc.)

Customer loyalty: Several studies show that brands committed to CSR or ESG initiatives benefit from increased customer loyalty - Accenture (2018); Kantar (2020); McKinsey (2022).

Enhanced reputation and brand image: Companies committed to CSR are viewed more favourably by consumers, investors and society in general, which can lead to a better reputation and enhance their attractiveness.

Access to markets, business opportunities and financing: Opportunity to access new markets by meeting the growing demand for environmentally friendly and socially responsible products and services. Opportunity to meet the environmental clause of certain public contracts

**Social benefits:**

Employer attractiveness: reduced staff turnover and greater employee engagement: +40% productivity (Gallup study).

Promoting and encouraging innovation: CSR often encourages innovation by encouraging companies to develop new technologies, products and services that meet social and environmental needs while being economically viable.

Health and well-being at work: reducing stress, improving the working environment, retaining employees = improved employee performance and reduced absenteeism/workplace accidents, reduced recruitment and training costs

**Environmental benefits:**

Reduction in emissions: -30% on average for ISO 14001-certified companies.

Resource conservation: Reuse of materials, water/energy savings.

Optimise costs by achieving savings through eco-responsible management (reduction in expenses, less waste, etc.) and thus be more competitive.

Anticipate regulatory constraints: By adopting responsible practices, companies can comply with current environmental, social and ethical regulations, thus avoiding fines and other potential penalties.

**2.3. Taking a methodical approach**

The advantage of a CSR approach is that it relies on a specific method to support entrepreneurs in their assessment and commitments. The CSR approach is not in itself a certification or labelling process, but it can lead to labelling or certification if the company wishes to obtain official recognition of its commitments.

Here is a detailed explanation to clarify this distinction, with concrete examples and references to existing labels:

Examples of methodological support:

[ISO 26000: Guidance on CSR](#)

[Global Compact: 10 principles on human rights, labour, the environment and anti-corruption](#)

[B Corp: Certification for businesses with a positive impact](#)

Examples of possible labels to validate a CSR approach:

Label Certification	Description	Target audience
<b>B Corp</b>	Certification for companies that meet strict criteria for social and environmental performance and transparency.	Microbusinesses, SMEs, large companies

<b>Label Certification</b>	<b>Description</b>	<b>Target audience</b>
<b>Committed to CSR</b>	French label that assesses the integration of CSR into a company's strategy.	SMEs and mid-cap companies
<b>EcoVadis</b>	CSR performance assessment platform, with a rating system (bronze, silver, gold, platinum).	All sizes
<b>ISO 14001</b>	Environmental management system certification (not a comprehensive CSR label).	All sizes
<b>Global Compact</b>	Voluntary commitment to comply with 10 CSR principles (not certification, but recognition).	All sizes
<b>Lucie 26000</b>	French label inspired by the ISO 26000 standard, with an audit process.	SMEs and large companies

## 2.4. Engaging with stakeholders

In the context of CSR (Corporate Social Responsibility), stakeholders refer to any individual, group or organisation that can affect or be affected by a company's activities, decisions or performance. They play a key role in the implementation and evaluation of CSR strategy, as they influence — or are affected by — the social, environmental and economic impacts of the company.

The involvement of stakeholders in a CSR approach is essential, as they are the ones who can influence the ability to initiate changes to a production process, internal organisation, product, etc.

Stakeholders co-construct the CSR approach by:

Expressing their expectations (e.g. customers demanding eco-friendly products, employees demanding better working conditions).

Validating actions (e.g. certification by a third party, customer feedback).

Assessing impacts (e.g. social audits, carbon footprint assessments).

For example: a producer's transition to organic certification depends on whether or not its customers are willing to accept the price changes resulting from the change in the production process – a painter's decision to work only with eco-labelled paints depends both on its suppliers' ability to find the necessary products and on its customers' willingness to accept any additional costs.

Stakeholders can be internal (directly linked to the company) or external (influenced by the company or influencing its activities). Here is a detailed classification:

### a. Internal Stakeholders

These are the actors directly linked to the company:

Category	Examples	Related CSR Issues
<b>Employees</b>	Employees, managers, executives.	Working conditions, training, diversity, well-being, social dialogue.
<b>Shareholders</b>	Owners, investors.	Profitability, transparency, alignment of financial and non-financial objectives (ESG).
<b>Trade unions</b>	Employee representatives.	Collective bargaining, respect for workers' rights.

#### b. External stakeholders

These are actors indirectly linked to but impacted by or influencing the company:

Category	Examples	Related CSR Issues
<b>Customers</b>	Consumers, end users.	Product quality, transparency, ethics, commitment to standards (e.g. labels, traceability).
<b>Suppliers</b>	Subcontractors, business partners.	Responsible purchasing, respect for human rights in the supply chain.
<b>Communities</b>	Local residents, associations, local authorities.	Local impact (employment, pollution, economic development), regional dialogue.
<b>NGOs/ Associations</b>	Environmental or social organisations (e.g. Greenpeace, WWF).	Pressure for sustainable practices, partnerships on social/environmental projects.
<b>Public authorities</b>	States, regions, municipalities, regulatory agencies (e.g. ADEME, EU).	Regulatory compliance (e.g. AGEC law, green taxonomy), subsidies, public tenders.
<b>Media</b>	Press, social media, influencers.	Brand image, responsible communication, crisis management.
<b>Competitors</b>	Other companies in the sector.	Benchmarking, sector collaborations (e.g. joint charters to reduce carbon footprint).

Activity 2 below invites the trainer and learners to engage in a process of identifying stakeholders and translating the associated issues into a "materiality matrix".

The materiality matrix is introduced in this activity. It allows to classify the importance of each stakeholder for the feasibility of the CSR engagements.

### 3. Implementing the entrepreneur's eco-commitments

This chapter should enable the trainer to support learners in formulating concrete environmental commitments as part of a CSR or eco-responsibility approach. We do not provide an exhaustive list of possible actions, but suggest that trainers focus commitments on four priority areas for action: the circular economy, responsible consumption, the fight against waste, and the company's energy policy.

### 3.1. Applying the principles of the circular economy

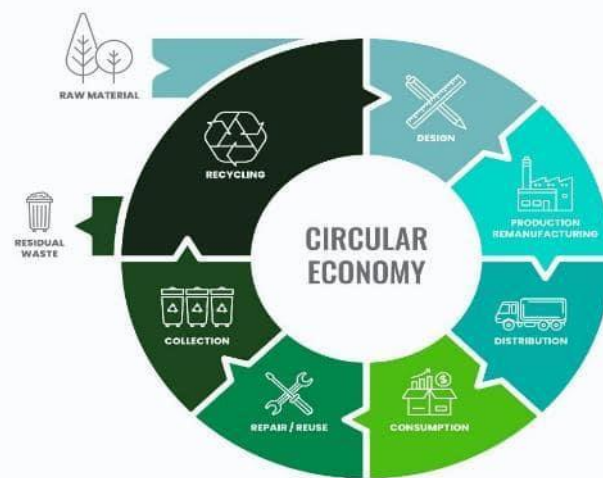
The circular economy is an economic model that aims to produce goods and services while limiting the consumption and waste of raw materials, water and energy sources. Several explanatory videos presenting the concept of the circular economy are available and can be used by trainers:

[In French](#)

[In English](#)

[In German](#)

Trainers can identify similar resources in their own regions



**Circular Economy** – source Freepik

#### **The 7 pillars of the circular economy:**

1. **Eco-design:** Designing sustainable, repairable and recyclable products. Example: Fairphone (modular and recyclable smartphone).
2. **Industrial and territorial ecology:** Pooling resources between companies (e.g. one company's waste = another company's raw material). Example of the recovery of sludge or wastewater from treatment plants for use in agriculture
3. **Functionality economy:** Selling usage rather than the product (e.g. rental, subscription). Example: Michelin offers tyres as a "service" (payment per kilometre) / enabling equipment sharing between peers/neighbours.
4. **Reuse:** Reusing a product as is or after repair - Example: Back Market (reconditioning smartphones).
5. **Repair:** Extending the life of products - Example: "Repair Café" repair workshops for bicycles or household appliances, for example; ending planned obsolescence on certain equipment.

6. **Recycling:** Transforming waste into new raw materials - Example: the [Raedificare](#) association in Marseille, France, which recovers and recycles demolition waste so that it can be reused on other construction sites.
7. **Waste recovery:** Recovering energy or materials from non-recyclable waste - Example: Methanisation of organic waste to produce biogas.

### Benefits for the company:

Economic: Reduction in raw material costs (20% on average).

Environmental: Reduction in carbon footprint (-30% for committed companies).

Social: Creation of local jobs that cannot be relocated.

Activity 3 below enables the organisation of a workshop on the principle of eco-design.

### 3.2. Developing a sustainable consumption approach

The principles of sustainable consumption consist of the rational use of resources (in particular by applying the principles of the circular economy outlined above) but also by using supplies/consumables for the company's activities that are guaranteed to have a lower impact on the environment. In particular, learners will be encouraged to identify eco-labelled supplies.

Why use labelled products?

Labelling is granted in exchange for compliance with a set of specifications, a contractual commitment that provides tangible proof to consumers of the company's environmental commitment. Although purchasing labelled products may entail additional costs for the company, it helps to reduce its environmental impact. If an entrepreneur wishes to commit to a label, in some cases they must commit to purchasing labelled supplies (for example, a farmer with organic certification must provide organic feed for their livestock).

### Overview of the main labels and certifications:

Label/Certification	Field	Main criteria
<b>EU Ecolabel</b>	Products and services	Reduced environmental impact throughout the entire life cycle
<b>AB (Organic Farming)</b>	Agricultural products and foodstuffs	Prohibition of synthetic pesticides, GMOs and chemical fertilisers
<b>Fairtrade/Max Havelaar</b>	Fair trade	Fair prices for producers, decent working conditions
<b>B Corp</b>	Companies	Social and environmental performance, transparency

Label/Certification	Field	Main criteria
ISO 14001	Environmental management system	Continuous improvement, regulatory compliance

There are also specialised labels for specific types of products/supplies: cosmetics (organic label), textiles (Global Organic Textile Standard label), IT supplies (EPEAT GOLD/SILVER or TCO). Depending on the learners' sectors of activity, the trainer may need to help them identify the labels that apply to the supplies/equipment relevant to them.



The aim of this section is to help trainers convey the importance of waste in a productive activity and the possible levers for reducing this waste. Participants must identify the 8 types of waste (Lean), assess their impact and propose solutions adapted to a microbusiness/SME.

### The eight types of waste (Muda):

The concept of the eight types of waste (or "Muda" in Japanese) comes from Lean Management, a methodology developed by Toyota in the 1950s–1970s to optimise production processes by eliminating activities that do not add value. These wastes were formalised by Taiichi Ohno, an engineer at Toyota, and have become a pillar of Lean Manufacturing.

#### 1. Overproduction

Definition: Producing more than necessary or too early, which generates unnecessary inventory, storage costs and a waste of resources (raw materials, energy, labour).

Concrete examples: A bakery that throws away 20% of its unsold bread every day. A factory that produces parts ahead of orders, leading to overstocking.

CSR impacts:

Environmental: Waste of resources (water, energy, raw materials).

Economic: Costs of storing and destroying unsold items.

Social: Stress for employees (pressure to produce more).

Solutions:

Production on demand.

Sales analysis to adjust production.

Anti-waste partnerships (e.g. donating unsold items to organisations such as Too Good To Go).

## **2. Waiting time**

Definition: Time lost due to unnecessary delays between two stages of a process (e.g. waiting for raw materials, validation, maintenance).

Concrete examples: Employees waiting 30 minutes for their machine to be repaired. A customer waiting 1 hour for service due to poorly managed queues.

CSR impacts:

Social: Frustration among employees and customers.

Economic: Loss of productivity and revenue.

Solutions:

Preventive maintenance to avoid breakdowns.

Optimisation of flows (e.g. Kanban method to visualise bottlenecks).

Training teams to be versatile (e.g. an employee can switch from one task to another without downtime).

## **3. Unnecessary transport**

Definition: Unnecessary movement of people, raw materials or products, which generates costs and CO<sub>2</sub> emissions.

Concrete examples:

A lorry that delivers half-empty due to poor planning. Employees who travel several times a day between two nearby sites.

CSR impacts:

Environmental: Unnecessary CO<sub>2</sub> emissions (road transport = 20% of CO<sub>2</sub> emissions in Europe).

Economic: Avoidable logistics costs (fuel, vehicle wear and tear).

Solutions:

Route optimisation Consolidation of deliveries (e.g. sharing with other companies).

Teleworking or videoconferencing to reduce travel.

## **4. Excess inventory**

Definition: Accumulation of raw materials, finished products or work in progress that tie up resources (space, money) and risk becoming obsolete.

Concrete examples: A warehouse full of unsold clothing (e.g. fast fashion). A company that stocks six months' worth of raw materials for fear of shortages.

CSR impacts:

Environmental: Waste of resources if stocks become obsolete (e.g. discarded textiles).

Economic: Storage and disposal costs.

Solutions:

Just-in-time inventory management.

Data analysis to forecast demand.

Circular economy: Reuse or recycle unsold stock.

## **5. Unnecessary movements**

Definition: Unnecessary movements or actions by employees or machines, often due to poor workplace organisation.

Concrete examples: An employee who has to walk 100 metres to fetch a tool - A machine whose parts are poorly positioned, forcing the operator to make repetitive movements.

CSR impacts:

Social: Risk of musculoskeletal disorders (MSDs) for employees.

Economic: Loss of time and reduced productivity.

Solutions:

Redesign of workstations

Automation of repetitive tasks (e.g. robots for carrying heavy loads).

Training in ergonomic movements.

## **6. Over-processing**

Definition: Doing more than necessary to meet customer needs, often through excessive quality, features or controls.

Concrete examples: A product wrapped in three layers of plastic when one would suffice - An overly detailed internal report that takes twice as long to write.

CSR impacts:

Environmental: Waste of materials (e.g. unnecessary packaging).

Economic: Additional time and costs.

Solutions:

Simplification of processes (e.g. elimination of redundant steps).

Eco-design: Reduce materials while maintaining quality (e.g. 100% recyclable packaging).

Dialogue with customers to understand their real needs.

## **7. Defective products**

Definition: Production of defective products or non-compliant services, resulting in returns, rejects and additional costs

Concrete examples: A factory that discards 5% of its production due to defects - A customer service department that has to reprocess 20% of orders due to errors.

CSR impacts:

Environmental: Waste of raw materials and energy.

Economic: Non-quality costs (returns, warranties).

Social: Frustration among customers and employees.

Solutions:

Upstream quality control (e.g. Six Sigma methods).

Employee training to reduce errors.

Reuse of waste (e.g. fabric scraps turned into accessories).

## **8. Unused Employee Creativity**

Definition: Failure to take advantage of employees' ideas, skills or creativity, often due to a lack of dialogue or recognition.

Concrete examples: An employee who does not suggest improvements for fear of not being listened to - A company that ignores suggestions from field teams.

CSR impacts:

Social: Demotivation, high turnover.

Economic: Loss of innovation and efficiency.

### **Solutions:**

Suggestion box or collaborative workshops

Recognition of contributions (e.g. bonuses, promotions).

Training in participatory innovation.

Activity 4 below should enable the trainer to guide learners in a collective reflection on waste reduction

## **3.4. Optimising your energy policy**

The trainer's objective is to help learners identify and understand the challenges of the energy transition for their business, carry out a simplified energy assessment, and identify solutions tailored to their project.

### **The Negawatt scenario:**

This is a theoretical scenario developed by the [Negawatt](#) association, which supports public authorities, local authorities, private actors and citizens in their efforts to reduce their energy consumption. The association has established action scenarios based on three complementary pillars:

**Sobriety:** Reducing needs (e.g. turning off appliances on standby, limiting heating).

**Efficiency:** Optimising equipment (e.g. insulation, LED lighting).

**Mobilisation of renewable energies:** Replacing fossil fuels (e.g. solar, wind).

Negawatt's macroeconomic objectives in these scenarios: -50% energy consumption by 2050 - 100% renewable energy.

The trainer must enable learners to understand the three pillars and identify possible courses of action at their level:

**Step 1: Energy assessment:** becoming aware of one's consumption – Based on energy bills, consumption readings or assessment software

**Areas to analyse:** Heating/air conditioning (40% of consumption in the tertiary sector) / Lighting (15%) / IT equipment (10%) / Transport (varies depending on activity).

**Step 2: Identify solutions** – Some possible solutions:

<b>Solution</b>	<b>Cost</b>	<b>Annual savings</b>	<b>Return on investment time</b>
Replace bulbs with LEDs	€50–€500	20–50	1–2 years
Insulate premises	€10,000–50,000	25–35%	5–10 years
Install solar panels	€5,000–20,000	30–70%	5–10 years
Switch to a green electricity supplier	€0–€500/year	Variable	Immediate (cost neutral or slightly higher)
Replace IT equipment	Variable depending on the size of the company	Variable	3-5 years
Switch off equipment and avoid standby mode	0	Variable	Immediate

The trainer can add solutions according to the profiles of the entrepreneurs: renovation of the vehicle fleet to electric vehicles, partial replacement of machine tools with lower consumption equipment, etc

### 3.5. Translating commitments into a voluntary approach

To finalise the training, trainers are invited to assist their learners in formalising a commitment grid. This formalisation is developed in Activity 5 below.

The aim is to make it clear that, beyond the commitments themselves, it is their implementation and monitoring over time that will lead to a lasting impact and enable the CSR approach to be successful. It is recommended to include performance indicators and a monitoring schedule for each commitment, and to identify the stakeholders with whom these commitments can be fulfilled. Participants will be able to formalise their CSR commitments in a charter, report or external communication, and identify the tools to implement them.

Why formalise commitments?

Clarity: Define measurable and shared objectives.

Credibility: Proof of commitment to stakeholders.

Monitoring: Evaluate progress and adjust strategy.

**Formalisation tools: to formalise a CSR approach and communicate about it, several actions are possible:**

Drafting a company "CSR Charter":

Content: Values, commitments, indicators, managers.

Example: "Reduce our CO<sub>2</sub> emissions by 20% by 2025." - "Train 100% of our employees on environmental issues by 2024."

Publishing a CSR report, preferably annually – Example of structure: Context, actions, results, outlook.

Developing external communications: Website, social media, newsletters.

Example: "Our Commitments" page on the company website.

## Practical action points / Can I have some tips?

### 1. Make eco-responsibility concrete and accessible

Use real-life examples: Show concrete cases of local or well-known companies that have integrated eco-responsible practices (e.g., waste reduction, energy saving, short supply chains).

Key figures: Illustrate with simple data (e.g. 'Reducing waste by 20% can save X pounds per year').

Practical tools: Present free or low-cost tools (e.g. carbon footprint calculators, eco-label guides, etc.).

### 2. Adapt your message to the audience of business creators

Talk 'business': Whenever possible, link eco-responsibility to economic benefits (cost reduction, customer appeal, subsidies, brand image).

Avoid jargon: Use simple language and explain acronyms.

Show quick wins: Support learners with simple, immediate action proposals.

### **3. Anticipate obstacles and objections**

Lack of time/budget: Respond with low-cost solutions (e.g., 'Start by measuring your energy consumption. It's free and takes an hour').

Scepticism: Use case studies showing a positive ROI (return on investment) (e.g. 'This company reduced its costs by 15% by optimising its resources').

Perceived complexity: Break down the process into simple steps (e.g. '1. Audit → 2. Prioritisation → 3. Action').

### **4. Emphasise communication**

Promote efforts: Show how to communicate commitments (social media, website, labelling) to turn them into a selling point.

Avoid greenwashing: Raise awareness of the pitfalls of misleading communication and the importance of transparency.

## **Evaluating success /Let's evaluate what I learnt!**

### **1. What is CSR (Corporate Social Responsibility)?**

- a) A legal obligation imposed on all companies.
- b) A voluntary approach that integrates social, environmental and economic concerns into a company's activities.
- c) A label certifying that a company is 100% environmentally friendly.
- d) A management system exclusively reserved for large companies.

**Correct answer: b**

### **2. The internal stakeholders of a company include:**

- a) Customers and suppliers.
- b) Shareholders and NGOs.
- c) Employees and trade unions.
- d) Local communities and the media.

**Correct answer: c**

### **3. What is the main objective of the ISO 26000 standard?**

- a) To certify environmental management systems.
- b) To provide guidelines for a CSR approach.
- c) To impose sanctions on non-compliant companies.
- d) To label eco-friendly products.

**Correct answer: b**

**4. Among the ESG criteria, which pillar concerns the reduction of CO<sub>2</sub> emissions?**

- a) Social (S).
- b) Environmental (E).
- c) Governance (G).
- d) None of the three.

**Correct answer: b**

**5. The AGEC (Anti-Waste for a Circular Economy) law imposes, among other things:**

- a) A total ban on plastic packaging by 2025
- b) Mandatory waste sorting for all businesses.
- c) The removal of subsidies for renewable energies.
- d) The obligation for companies to publish an annual CSR report.

**Correct answer: b**

**6. Which type of waste in Lean manufacturing corresponds to the production of defective products?**

- a) Overproduction.
- b) Waste (Defects).
- c) Waiting time.
- d) Unnecessary movement.

**Correct answer: b**

**7. What tool can be used to identify and prioritise stakeholder expectations?**

- a) The SWOT matrix.
- b) The materiality matrix.
- c) The carbon footprint assessment.
- d) The ISO 9001 quality audit.

**Correct answer: b**

**8. Which of the following labels certifies a comprehensive CSR approach?**

- a) EU Ecolabel.
- b) B Corp.
- c) ISO 14001.
- d) Fair Trade.

**Correct answer: b**

**9. Which of the following benefits results from a CSR approach for a micro-enterprise?**

- a) An unavoidable legal obligation.
- b) Improved image and customer loyalty.
- c) An immediate increase in profits.
- d) Automatic tax exemption.

**Correct answer: b**

**10. The CSRD (Corporate Sustainability Reporting Directive) mainly concerns:**

- a) Micro-enterprises.
- b) Large companies and listed companies in Europe.
- c) Exclusively public sector companies.
- d) American companies operating in Europe.

**Correct answer: b**

**11. What is the environmental impact of unnecessary transport in a company?**

- a) Increased productivity.
- b) A reduction in logistics costs.
- c) An increase in CO<sub>2</sub> emissions.
- d) Improved working conditions.

**Correct answer: c**

**12. What type of waste is associated with poor workplace organisation?**

- a) Over-processing.
- b) Unnecessary movements.
- c) Excess inventory.
- d) Waiting time.

**Correct answer: b**

**13. Which ESG criterion assesses diversity and inclusion in a company?**

- a) Environmental (E).
- b) Social (S).
- c) Governance (G).
- d) None of the above.

**Correct answer: b**

**14. Which action helps reduce waste from overproduction?**

- a) Increasing safety stocks.
- b) Implementing on-demand production
- c) Outsource production.
- d) Automate 100% of processes.

**Correct answer: b**

**15. What is the main objective of the circular economy?**

- a) To maximise waste production.
- b) To reduce, reuse, recycle and regenerate resources.
- c) To increase the consumption of raw materials.
- d) Eliminate all industrial activity.

**Correct answer: b.**

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# Tool n°1: Discover the 3 Pillars of Sustainable Development in 1 Hour.

## AIM

- Understand the 3 pillars of sustainable development (environmental, social, economic) through concrete examples.
- Classify actions or projects according to the dominant pillar.
- Reflect on the balance between these pillars in real-life situations.

## LEARNING OUTCOMES

By the end of the activity, learners will be able to:

- Define the three pillars of sustainable development.
- Associate concrete examples with each pillar.
- Identify imbalances between the pillars in a project or organisation.

## DURATION

45 to 60 minutes.

## MATERIALS

- 1 slide with the definition of the three pillars + 1 simple diagram (e.g. three intersecting circles).
- Cards or post-it notes 10–15 cards with actions/projects to be classified (e.g. "install solar panels"). These cards must be prepared in advance by the trainer.
- Board or flipchart to display the three pillars and stick the cards on.
- Concrete example: 1 simple case study (e.g. a local organic bakery).

## METHODOLOGY

- Visual and interactive approach: Use diagrams and cards to reinforce concepts.
- Active learning:
- Classification game to make learning fun.
- Short debate to encourage critical thinking.
- Anchoring in reality: Examples taken from everyday life or local businesses.

## PROCESS

### Step 1: Introduction (10 mins)

**Objective:** Present the three pillars in a clear and visual manner.

**Content:**

Simple definition: "Sustainable development is based on three pillars: environmental, social and economic. These must be balanced to ensure a viable future."

Visual diagram: Draw three intersecting circles (or use a projected image).

Environmental: Preservation of nature (e.g. reducing pollution).

Social: Well-being and equity (e.g. working conditions, education).

Economic: Financial viability (e.g. profits, local jobs).

Concrete example: A local organic bakery that:

- Uses organic ingredients (environmental).
- Hires apprentices (social).
- Sells its products through short supply chains (economic).

**Activity:**

Introductory question: "In your opinion, which of these pillars is most often neglected? Why?" (Quick 2–3 min discussion).

**Step 2: Classification game (20 mins)**

**Objective:** Associate concrete actions with each pillar.

**Content:**

Cards to classify: Prepare 10–15 cards with actions/projects. Examples:

"A company installs solar panels." → Environmental.

"A restaurant offers discounted meals for students." → Social.

"An SME buys its raw materials locally." → Economic (and social).

**Instructions:**

In groups of 2–3, learners sort the cards according to the dominant pillar.

Some actions may relate to several pillars (to be discussed).

**Activity:**

Group review: The trainer displays the cards on a board in three columns (Environmental / Social / Economic) and explains the choices.

Discussion: "Why do some actions affect several pillars?" (e.g. local purchasing = economic + social).

**Step 3: Analysis of an Imbalance (15 min)**

**Objective:** To understand the consequences of an imbalance between the pillars.

**Content:**

Example of imbalance:

"A factory that pollutes to maximise its profits" → Strong economic pillar, but weak environmental and social pillars.

"An organisation that helps the homeless but has financial difficulties" → Strong social pillar, but weak economic pillar.

Consequences:

Short term: economic or social gains.

Long term: risks (e.g. sanctions, loss of reputation, closure).

**Activity:**

Quick exercise: "Find an example of imbalance in your industry or daily life."

Pooling: 2–3 examples are shared and discussed in a group;

**Step 4: Practical application (10 mins)**

**Objective:** Propose a balanced action for a fictional or real project.

**Content:**

Instruction: "Imagine a simple action for a small business (e.g. a café, a shop) that incorporates the three pillars. Describe it in three sentences."

Example:

"A café that: Uses returnable cups (environmental), / Hires young people in integration programmes (social), / Buys its coffee directly from producers (economic)."

**Step 5: Summary and Evaluation (5 min)**

**Objective:** To summarise what has been learned and conclude the activity.

**Summary:**

The three pillars and their interdependence - The importance of balance for true sustainability.

Key message: "A sustainable project must take all three pillars into account, otherwise it may not be viable in the long term"

**TIPS FOR TRAINERS**

**1. Simplify the examples:**

Use everyday situations (e.g. sorting waste at home, buying in bulk) to make the subject accessible. Avoid jargon: use terms such as "respect for the environment", "employee well-being" and "profitability".

**2. Make the activity visual:**

Display the three pillars on a flipchart using different colours.

Use images (e.g. a forest for the environment, people for social issues, coins for the economy).

**3. Encourage participation:**

Ask open-ended questions: "Which pillar do you think is most important for a small business? Why?" Value all suggestions during the exercises to maintain engagement.

**4. Be flexible:**

If time is short, reduce the number of cards to be sorted (5–10 is sufficient).

Adapt the examples to the learners' sectors of activity (e.g. construction, commerce, services).

## ASSESSMENT

1. During the activity:  
Participation in discussions and classification exercises.  
Relevance of the examples given during the practical activity.
2. At the end of the activity  
Oral or written question:  
"Give an example for each pillar of sustainable development."  
Why is it important to balance the three pillars?"

## REFERENCES

- Toyota Production System: The 5 Whys method was popularised by Toyota in the 1970s to improve quality and solve production problems.
- Book: The Toyota Way (Jeffrey Liker, 2004).
- OECD: Use of the method in innovation and continuous improvement initiatives.
- Website: MindTools – 5 Whys (resource in English)

## Tool n°2: Identifying Stakeholders and their Materiality

### AIM

- Understand the concept of stakeholders in a CSR approach.
- Identify the internal and external stakeholders of an organisation (e.g. small business, association).
- Prioritise their expectations using a simplified materiality matrix.
- Apply this method to a specific case (fictional or real company).

### LEARNING OUTCOMES

By the end of the activity, learners will be able to:

- Define a stakeholder and their role in CSR.
- List the key stakeholders of a small business.
- Classify these stakeholders according to their influence and impact (materiality matrix).
- Propose CSR actions based on priority expectations.

### DURATION

45 minutes.

### MATERIALS

- 1 slide with the definition of stakeholders + example of a materiality matrix.
- 10–15 cards with stakeholders to be classified (e.g. "customers", "suppliers", "employees").
- Board or flipchart to draw the materiality matrix and stick the cards on.
- Concrete example: Simple case study (e.g. a local organic bakery or a small craft business).
- Blank matrix to be filled in (X-axis: influence; Y-axis: impact).

### METHODOLOGY

- Visual and participatory approach: Use of diagrams and maps to anchor concepts.
- Active learning:
- Classification game to identify stakeholders.
- Collaborative workshop to fill in the materiality matrix.
- Anchoring in reality: Examples drawn from local SMEs or sectors familiar to learners.

### PROCESS

#### Step 1: Introduction to stakeholders (10 mins)

- Objective: Define stakeholders and their importance in CSR.
- Content:
  - Simple definition: "A stakeholder is any person or group affected by or able to affect an organisation's activities." Concrete examples: Internal: Employees, managers, shareholders. / External: Customers, suppliers, local communities, NGOs, public authorities.
  - Visual diagram: Draw two circles (internal/external) and place examples in them.
  - Example: An organic bakery has the following stakeholders:

- Employees (working conditions).
- Customers (product quality).
- Organic flour suppliers (business relationship).
- Neighbours (impact of noise pollution).
- Personal activity:
  - Question: "Which stakeholders can you identify in your company or sector of activity?" (Quick 2–3 min discussion).
  -

### Step 2: Stakeholder Classification Game (10 mins)

- **Objective:** Identify and classify an organisation's stakeholders.
- **Content:**
  - **Cards to classify:** Prepare 10–12 cards with stakeholders (e.g. "customers", "banks", "local associations", "employees").
  - **Instructions:**
    - In groups of 2–3, learners classify the cards into **2 categories:** *internal* and *external*.
    - Some stakeholders may be **ambiguous** (e.g. "family shareholders" → to be discussed).
- **Activity:**

**Group review:** The trainer displays the cards on a board in two columns (Internal/External) and explains the choices.

- **Discussion:** "Why are some stakeholders difficult to classify?" (e.g. a supplier who is also a customer).
- 

### Step 3: Introduction to the Materiality Matrix (10 mins)

- **Objective:** Understand how to prioritise stakeholder expectations.
- **Content:**
  - **Simple definition:** "The materiality matrix allows stakeholders to be classified according to their **influence** on the company and **the** company's **impact** on them."
  - **Matrix diagram:**
    - **X-axis (horizontal):** Stakeholder influence on the company (1 = low; 5 = high).
    - **Y-axis (vertical):** Company's impact on the stakeholder (1 = low; 5 = high).
  - **Example:**
    - **Customers:** Strong influence (purchases), strong impact (product quality).
    - **Neighbours:** Low influence, medium impact (nuisances).

#### Step 4: Workshop – Completing a Materiality Matrix (15 mins)

- **Objective:** Apply the matrix to a specific case.
- **Content:**
  - **Case study:** A fictional **SME** (e.g. a wooden furniture manufacturing company).
    - **Stakeholders:** Employees, customers, timber suppliers, local residents, bank.
  - **Instructions:**
    - In groups, place each stakeholder on the matrix (on paper or a board).
    - **Discuss** the reasons for the positioning.
  - **Example result:**

STAKEHOLDER	INFLUENCE (1-5)	IMPACT (1-5)
Customers	5	5
Employees	4	5
Suppliers	3	4
Residents	2	3

- **Presentation:** Each group explains its ranking.
- **Discussion:** *"Which stakeholders should be prioritised for this SME? Why?"*

#### TIPS FOR TRAINERS

- 1. Simplify the examples:**
  - Use local SMEs or sectors familiar to learners (e.g. commerce, crafts).
  - Avoid complex cases (e.g. multinationals).
- 2. Make the activity visual:**
  - Draw the materiality matrix on the board using colours.
  - Use sticky notes so that learners can easily move stakeholders around.
- 3. Encourage participation:**
  - Ask open-ended questions: *"Why do customers have a strong influence?"*
  - Value all answers to maintain engagement.
- 4. Be flexible:**
  - If time is short, reduce the number of stakeholders to be classified (5–6 is sufficient).
  - Adapt the case study to the learners' sector (e.g. a restaurant, a workshop).
- 5. Provide a summary sheet:**
  - Definition of stakeholders.
  - Blank materiality matrix template.
  - Completed example (e.g. organic bakery).

## ASSESSMENT

### 1. During the activity

Observation:

Participation in discussions and classification exercises.

Relevance of arguments when placing stakeholders on the matrix.

### 2. At the end of the activity

Oral question:

"Name three internal and three external stakeholders for a small business."

"Why is it important to prioritise stakeholder expectations?"

## Tool n°3: Discover Eco-Design in 45 Minutes: Principles and Practical Application.

### AIM

- Understand the basic principles of eco-design and its importance in a CSR approach.
- Identify the key stages in a product's life cycle and the levers for environmental improvement.
- Apply these principles to a simple product (e.g. packaging, furniture, clothing).
- Reflect on the economic and social benefits of eco-design...

### LEARNING OUTCOMES

By the end of the activity, learners will be able to:

- Define eco-design and its seven key principles (e.g. reduction of materials, recyclability).
- Analyse a product's life cycle to identify areas for improvement.
- Propose eco-design solutions for a simple product.
- Assess the benefits (environmental, economic, social) of eco-design.

### DURATION

45 to 60 minutes.

### MATERIALS

- 1 slide with the definition of eco-design + diagram of a product's life cycle.
- Example of a simple product to analyse (e.g. a plastic bottle, a T-shirt, a wooden chair).
- Notepads or sticky notes for writing down ideas for improvement.
- Board or flipchart for drawing the life cycle and eco-design proposals.
- Simplified table of the 7 principles of eco-design (see below).

### METHODOLOGY

- Visual and practical approach: Use of a tangible product to reinforce concepts.
- Active learning
- Collective analysis of a product's life cycle.
- Brainstorming to suggest improvements.
- Grounded in reality: examples of everyday products or local micro-businesses.

### PROCESS

#### Step 1: Introduction to Eco-Design (10 mins)

**Objective:** Define eco-design and its challenges.

**Content:**

Simple definition:

"Eco-design involves integrating environmental criteria into the design of a product in order to reduce its impact throughout its life cycle."

7 key principles (to be displayed):

Reduction of materials (e.g. lightweight packaging).  
Choice of sustainable materials (e.g. certified, recycled wood).  
Production optimisation (e.g. less energy, less waste).  
Extended lifespan (e.g. repairable products).  
Recyclability (e.g. single-material materials).  
Reduced impact during use (e.g. less energy-intensive products).  
End-of-life management (e.g. deposit, reuse).

Concrete example: A returnable glass bottle:

Recyclable material (principle 5).

Reusable (principle 4).

Less waste (principle 1).

## **Step 2: Product Life Cycle Analysis (15 min)**

**Objective:** Understand the stages of the life cycle and identify environmental impacts.

**Content:**

Life cycle diagram (to be drawn on the board): [Extraction of materials] → [Production] → [Distribution] → [Use] → [End of life]

Example analysed: A wooden chair (or a product chosen by the learners).

Extraction: Wood.

Production: Glues, energy used.

Distribution: Transport

Use: Lifespan, repairability.

End of life: Recyclable? Reusable?

Identify the environmental impacts associated with these different stages.

## **Stage 3: Eco-design workshop (15 mins)**

**Objective:** Propose concrete improvements to reduce the product's impact.

**Content:**

"How could this chair be eco-designed to reduce its environmental impact while remaining economical and socially acceptable?"

Analysis grid (to be completed):

Eco-design principle	Improvement idea	Expected benefit
Reduction in materials	Use less wood or wood scraps.	Less waste, reduced costs.
Choice of sustainable materials	FSC-certified or recycled wood.	Forest preservation.
Recyclability	Designing the chair to be dismantled for easy recycling.	Reuse of materials.
To be completed with learners		

The trainer leads a discussion with the learners on the feasibility of the proposals.

#### Step 4: Summary and benefits of eco-design (5 mins)

**Objective:** To summarise what has been learned and highlight the advantages of eco-design.

**Content:**

Key benefits:

Environmental: Reduction in waste and CO<sub>2</sub> emissions.

Economic: Savings in raw materials, new customer base sensitive to eco-responsibility.

Social: Improved image, customer and employee loyalty

#### TIPS FOR TRAINERS

- Choose a simple, concrete product:
- Avoid complex products (e.g. a car). Opt for everyday objects (e.g. a bottle, a piece of furniture, an item of clothing). If the learners come from a specific sector (e.g. textiles, agri-food), adapt the example.
- Make the activity visual: Draw the life cycle on the board with arrows and annotations.
- Use different coloured sticky notes for each eco-design principle.
- Encourage creativity: Value all ideas, even the simplest ones (e.g. "reuse fabric scraps"). Emphasise that eco-design can also reduce costs (e.g. fewer materials = lower expenditure).

#### ASSESSMENT

1. During the activity  
 Observation:  
 Participation in discussions and brainstorming exercises.  
 Relevance of ideas proposed during the eco-design workshop.
2. At the end of the activity  
 "Name three eco-design principles and give an example for each."  
 "Why is eco-design important for a small business?"  
 Practical exercise:  
 Each learner proposes an eco-design idea for a product of their choice (e.g. packaging, furniture)

## Tool n°4: Eliminate Waste in Your Business.

### AIM

- Understand the 8 types of waste in Lean (Muda) and their impact on a business.
- Identify specific types of waste in a simple process (e.g. production, service, logistics).
- Propose practical solutions to reduce this waste.
- Raise awareness of the links between waste reduction and economic/environmental performance.

### LEARNING OUTCOMES

By the end of the activity, learners will be able to:

- List the 8 types of waste identified by Lean and recognise them in a process.
- Analyse a simple process to identify waste.
- Propose realistic and inexpensive corrective actions.
- Understand the benefits of reducing waste (costs, environment, well-being at work).

### DURATION

60 minutes.

### MATERIALS

- 1 slide with a list of the 8 types of waste + simple diagrams.
- Process example: Description of a simple process (e.g. making a cup of coffee, manufacturing a piece of furniture).
- Post-it notes or cards: 8 cards with the names of the 8 types of waste (e.g. "Overproduction", "Waste").
- Board or flipchart for drawing the process, sticking the waste cards and noting down the types of waste and solutions.

### METHODOLOGY

- Visual and practical approach: Use of a tangible product to reinforce concepts.
- Active learning
- Collective analysis of a product's life cycle.
- Brainstorming to suggest improvements.
- Grounded in reality: examples of everyday products or local micro-businesses.

### PROCESS

#### Step 1: Introduction to the 8 types of waste (10 mins)

**Objective:** Present the 8 types of waste in Lean in a clear and visual manner.

Simple definition:

"Wastes (or Muda) are activities that do not create value for the customer and generate costs or negative impacts."

List of the 8 wastes (to be displayed):

- Overproduction (producing too much or too early).

- Waiting time (unnecessary delays).
- Unnecessary transport (superfluous travel).
- Excess inventory (overstocking).
- Unnecessary movement (unnecessary actions or travel).
- Overprocessing (excessive quality or functionality).
- Waste (discarded materials or products).
- Non-use of skills (under-utilisation of human potential).

Concrete example: in a restaurant:

Overproduction = too many prepared dishes thrown away.

Waiting time = customers waiting too long.

Waste = non-recycled leftovers.

Group discussion: "What kind of waste do you see most often in your company or in your daily life?" (2–3 min discussion).

## **Step 2: Analysis of a simple process (15 mins)**

**Objective:** Identify waste in a specific process.

Example process: "Making coffee in a café" (or another simple process depending on the audience).

Steps:

- Customer order.
- Preparing the coffee (grinding, water, machine).
- Serving the customer.
- Cleaning up.
- 

Identifying waste through discussion with learners: Each group analyses one step in the process and identifies 1 to 2 types of waste.

Feedback: Each group presents its observations – Main examples:

- Overproduction: Coffee prepared in advance and thrown away.
- Waiting time: Customers waiting because the machine is slow.
- Waste: Disposable cups not recycled.
- Unnecessary movements: Barista moving around unnecessarily to fetch ingredients.

## **Step 3: Proposed solutions (15 mins)**

Objective: Find solutions to reduce the identified waste.

Collectively complete the solution grid: examples

Waste	Proposed solution	Expected Benefit
Overproduction	Prepare coffee on demand.	Less food waste.
Waste	Use returnable or compostable cups.	Reduction in waste.
Waiting time	Train staff to use a faster machine.	Improved customer satisfaction.

Blank grid to be completed based on learner feedback

#### Step 4: Summary and Benefits (5 min)

Objective: Summarise what has been learned and highlight the benefits of reducing waste.

Key benefits:

Economic: Cost reduction (less waste, less inventory).

Environmental: Less waste, lower CO<sub>2</sub> emissions.

Social: Better work organisation, less stress for employees

#### TIPS FOR TRAINERS

- Choose a simple, concrete process: Avoid complex processes (e.g. manufacturing a car). Opt for everyday examples (e.g. preparing a meal, managing stock in a shop).
- If the learners come from a specific sector (e.g. construction, healthcare), adapt the example.
- Make the activity visual: Draw the process on the board with arrows and annotations / Use different coloured sticky notes for each type of waste.
- Encourage participation: Ask open-ended questions: "Why is this waste a problem?" / Value all ideas, even the simplest ones (e.g. "putting tools away to avoid unnecessary movements").

#### ASSESSMENT

End-of-activity assessment

Oral or written question for discussion:

"Name 3 types of waste from the 8 and give an example for each."

"Why is reducing waste important for a small business?"

Individual practical exercise: Each learner identifies one type of waste in their company and proposes one solution

#### REFERENCES

- List of wastes (MUDA) to be prepared before the activity by the partner - <https://theleanway.net/The-8-Wastes-of-Lean>

## Tool n°5: Drafting a Simplified CSR Charter.

### AIM

- Understand the purpose and structure of a CSR charter.
- Identify key commitments appropriate for a microbusiness/SME.
- Draft a short and operational CSR charter (1 page max).
- Know how to communicate and apply this charter internally and externally.

### LEARNING OUTCOMES

By the end of the activity, learners will be able to:

- Define the role of a CSR charter and its essential components.
- Select 3 to 5 relevant and realistic CSR commitments for a small business.
- Draft a clear and concise CSR charter (structure + content).
- Propose actions to implement and communicate the charter.

### DURATION

60 to 75 minutes.

### MATERIALS

- 1 slide with the standard structure of a CSR charter + concrete examples.
- Charter template: Example of a simplified CSR charter (1 page) for a fictitious micro-business.
- Post-it notes or cards to write down the commitments proposed by the groups.
- Board or flipchart to display the structure of the charter and the groups' ideas.
- List of typical CSR commitments (environmental, social, economic).

### METHODOLOGY

- Practical and collaborative approach: Learners work on a concrete model of a CSR charter.
- Active learning:
- Brainstorming to identify commitments.
- Collective drafting of a simplified charter.
- Anchoring in reality: Examples taken from local SMEs or well-known sectors.

### PROCESS

#### Step 1: Introduction to the CSR Charter (10 mins)

**Objective:** Understand the purpose and structure of a CSR charter.

Simple definition:

"A CSR charter is a document that formalises a company's commitments to social and environmental responsibility. It serves as a guide for actions and communication."

Discussion: Why write a CSR charter?

Clarity: Define common objectives.

Credibility: Demonstrate commitment to stakeholders (customers, employees, suppliers).

Framework: Structure CSR actions.

Standard structure (to be displayed):

Preamble: Why this charter? (e.g. "Our company is committed to...").

Commitments: 3 to 5 priority areas (e.g. waste reduction, well-being at work).

Indicators: How to measure progress? (e.g. "% of waste recycled").

Responsibilities: Who does what? (e.g. "The manager oversees the process").

Communication: How should the charter be disseminated? (e.g. website, internal display).

If applicable, the trainer can identify existing charters and display them to illustrate the activity more concretely.

## **Step 2: Brainstorming CSR commitments (15-20 mins)**

**Objective:** Identify realistic CSR commitments that are appropriate for a small business.

List of typical commitments: to be drawn up at the beginning of the session and displayed – These are examples to illustrate the concept of commitment, not proposals for learners, who will have to identify their own commitments.

Environment: Reduce waste, use renewable energy, limit packaging.

Social: Train employees, promote diversity, improve working conditions.

Economic: Buy locally, optimise energy costs, develop sustainable partnerships.

Governance: Involve employees in decisions, publish an annual CSR report

Activity: In groups of 2–3, select 3 priority commitments for a fictional small business (e.g. a café, a repair shop). Criteria: Realistic (budget, time) / Measurable (e.g. "reduce by 20%" rather than "reduce") / Aligned with the company's values.

## **Step 3: Collective drafting of the Charter (15-20 mins)**

**Objective:** Draft a short, operational CSR charter.

Content: Template to be completed (projected or on paper): based on the standard structure presented above.

The groups complete the template with their three commitments (step 2). They add an evaluation indicator and a person responsible for each commitment.

Each group reads its charter aloud. The trainer can initiate a group discussion once the commitments have been formulated: are they all realistic? Are they all compatible with the company's activities and resources?

#### **Step 4: Implementation and Communication (5 to 15 minutes)**

**Objective:** To know how to apply and communicate the charter.

Actions to implement the charter:

- Action plan: Timetable, budget, people in charge
- Tools: Dashboard for monitoring indicators.
- Communication: Internal: Posters, team meetings, newsletters. / External: Website, social media, labels (e.g. Engagé RSE).

#### **TIPS FOR TRAINERS**

- Use concrete examples: Choose a local small business or a familiar sector (e.g. commerce, crafts) to make the exercise tangible. If learners come from a specific sector, adapt the commitments (e.g. waste reduction for a restaurant, energy saving for a workshop).
- Make the activity visual: Display the structure of the charter on the board and fill it in live with the groups' ideas. Use coloured post-it notes to differentiate between commitments (e.g. green for the environment, blue for social issues).
- Encourage simplicity: Emphasise that a CSR charter should be short, clear and realistic. Remind participants that small actions count (e.g. waste sorting, buying locally).

#### **ASSESSMENT**

- **At the end of the activity:**  
In groups: each participant pitches their CSR charter project in 3 minutes. The trainer and other participants evaluate each pitch in a constructive manner (3 strengths / 3 areas for improvement - if any).  
Individually: evaluation by the trainer of the written charter and formalisation of areas for improvement

Total Time:

**6** hours

# Learning Unit 9

## Designing and leading a training programme tailored to the learners' needs

# Learning Unit 9: Designing and leading a training programme tailored to the learners' needs

## Definition / What is this about?

This unit focuses on equipping participants with the pedagogical skills necessary to design, implement, and adapt training programmes that respond effectively to the diverse needs of learners. In contemporary entrepreneurship training, groups are rarely homogeneous: participants may differ in prior experience, educational background, motivation, language skills, learning pace, or access needs. This unit addresses these challenges by emphasizing adult learning principles, inclusive teaching strategies, and learner-centered approaches that place the learner's profile, starting point, and goals at the core of the training design.

Special attention is given to learners with disabilities or fewer opportunities, ensuring that entrepreneurship education is not only theoretically accessible but also practically inclusive. Through adaptable methods, flexible learning paths, and reflective practice, trainers are supported in creating learning environments where all participants can engage meaningfully, progress at their own pace, and build confidence in their abilities. In this way, the unit contributes to empowerment, equal opportunities, and skills development, aligning with European Social Fund priorities and reinforcing the social and educational role of inclusive entrepreneurship training.

## Learning Objective / What can I learn?

By the end of this unit, participants will be able to:

- Assess learner profiles and needs to design relevant training content adapted to their starting level and abilities.
- Create inclusive and engaging learning processes that foster motivation, support, and accessibility for all learners, including those with disabilities.
- Incorporate practical, up-to-date, and meaningful examples to make learning relatable and effective.
- Encourage continuous progress by supporting individual learning paths and integrating feedback into the process.
- Co-create learning paths, applying inclusive methods to foster motivation, ownership, and practical skill acquisition

## Introduction / What is included?

This unit equips participants with the pedagogical skills to design, implement, and adapt training programmes tailored to the diverse needs of learners, including those with disabilities or fewer opportunities. It emphasizes adult learning principles, inclusive teaching strategies, and learner-centered approaches, ensuring that entrepreneurship education is accessible, engaging, and effective across varied learner profiles.

This unit includes:

- **Principles of training need analysis** providing a structured approach to identify learners' skill gaps, goals, and prior knowledge, and linking training to real, practical needs. This process is continuous, allowing trainers to adapt programmes based on feedback and changing learner profiles.
- **Strategies for designing adaptable, learner-centred programmes** highlighting flexibility in methods, materials, and pacing, and positioning learners as active participants and co-creators of their learning experience.
- **Methods for inclusive teaching and engaging diverse learner groups**, using Universal Design for Learning (UDL), active learning methods (e.g., discussions, role-plays, teamwork), and fostering a safe, respectful environment where cultural, linguistic, and experiential diversity are recognized as strengths
- **Use of feedback and continuous improvement processes**, illustrating how formative feedback loops enhance training relevance, effectiveness, and learners' motivation while supporting individual learning paths.
- **Practical examples and case studies**, connecting theoretical principles with real-life applications to make learning meaningful, relatable, and transferable.

By following this approach, trainers develop the capacity to address heterogeneous groups effectively, ensuring equal opportunities, fostering empowerment, and promoting social participation. This unit also supports the development of transferable skills, employability, and lifelong learning, aligning with the priorities and added value of the European Social Fund (ESF).

## Contextualization / Why do I need to invest my time on this?

Trainers often face heterogeneous groups, with differences in experience, background, and learning styles. This unit prepares trainers to address these challenges by adopting inclusive, flexible, and reflective practices fostering equal opportunities, social inclusion, and transferable skills that support employability and lifelong learning. Developing these skills is critical to ensuring learners' active participation, and progress in entrepreneurship training. The principles of Training Needs Analysis, adult learning, and Universal Design for Learning are grounded in validated European educational approaches, ensuring high-quality, inclusive, and adaptable learning experiences.

Investing time in this unit enables trainers to design programmes that promote equal opportunities, active participation, and continuous learner progress. The skills developed are directly transferable to real training contexts and support broader European priorities related to social inclusion, empowerment, employability, and lifelong learning. By strengthening learner-centred and inclusive approaches, trainers enhance the quality and impact of entrepreneurship education across diverse contexts.

## Theoretical approach

### 1. Principles of training needs analysis

Before designing any training, it is crucial to understand what learners truly need. Training Needs Analysis (TNA) helps trainers identify which skills are missing, what learners already know, and what goals they want to achieve. Conducting TNA at the outset ensures that training is relevant, practical, and tailored to the participants who will attend. Importantly, TNA is not a one-time activity; it is a continuous process that allows both learners and trainers to monitor progress, evaluate effectiveness, and make timely adjustments

- **Identifying learner gaps, goals, and skills:** the training content is aligned with what participants need to develop. It consistently corresponds to the learner's needs.
- **Linking training to real needs:** ensuring that exercises, examples, and learning paths reflect practical challenges and opportunities learners face.
- **Applying a continuous improvement cycle:** diagnose → plan → evaluate → adapt, so that training remains effective and responsive over time

## 2.Strategies for designing adaptable, learner-centered programmes

A learner-centred programme places the learner at the heart of the training process, shifting the role of the trainer from sole knowledge provider to facilitator and guide. Rather than delivering uniform content to all participants, learner-centred design starts from learners' goals, experiences, and real-life challenges, making training more meaningful and relevant. This approach is particularly important in entrepreneurship education, where participants often bring diverse professional backgrounds, levels of confidence, and expectations.

Adaptability is a core principle of learner-centred programmes. Trainers are encouraged to adjust content, methods, and pacing based on learner feedback and observed needs. For example, a group with mixed experience levels may benefit from parallel activities, where beginners work with guided examples while more experienced learners explore advanced case studies. By using varied materials, interactive methods, and flexible learning paths, trainers ensure that all learners remain engaged and supported. These strategies are further applied through the practical activities of the unit, allowing participants to experience and reflect on adaptable programme design in realistic training scenarios.

Therefore, the main strategies are:

- **Placing the learner at the center of the process:** ensuring that their needs, prior knowledge, and learning goals guide both content and methods.
- **Promoting the role of the learner as facilitator and not only instructor:** encouraging participants to actively engage, share experiences, and co-create solutions
- **Maintaining flexibility & adaptability in methods and materials:** ensuring that training can respond to diverse learning styles, abilities, and group dynamics.
- **Using feedback to keep training dynamic:** integrating learners' input continuously to refine activities, pacing, and content.
- **Incorporating inclusive strategies:** differentiated instruction, multiple formats of materials, and approaches that accommodate learners with fewer opportunities or disabilities.
- **Adjusting learning paths to diverse needs:** providing parallel or scaffolded activities that allow all participants to progress meaningfully.
- **Linking activities to practical European case studies:** illustrating how theory applies in real contexts, enhancing engagement, transferable skills, and alignment with European Social Fund priorities.

## 3.Methods for inclusive teaching and engaging diverse learner groups

Inclusive teaching aims to ensure that all learners can participate actively and meaningfully in the learning process, regardless of background, language, or abilities. This requires trainers to intentionally design learning environments that value diversity and remove barriers to participation. Inclusive methods are especially relevant in heterogeneous groups, where differences in culture, learning pace, or communication styles can otherwise lead to disengagement or exclusion.

Practical inclusive strategies include the use of group work, discussions, role-plays, and problem-solving activities that encourage collaboration and multiple perspectives. Creating a safe and respectful learning environment is essential, allowing learners to express themselves without fear of judgment. Universal

Design for Learning (UDL) supports this approach by encouraging trainers to offer multiple ways of engaging with content, such as visual materials, written guidance, and hands-on activities. With inclusivity, learners feel motivated, connected, and able to succeed at their own pace. Through these methods, learners feel motivated, supported, and empowered to progress at their own pace, while trainers develop the capacity to respond effectively to diversity within the group.

Methods that guarantee inclusiveness are:

- **Providing equal opportunities for all learners:** ensuring that everyone has access to the content, activities, and support needed to participate fully.
- **Embedding active and varied learning methods:** group work, discussions, role-plays, and problem-solving activities, which allow different perspectives to be expressed and encourage collaboration among participants.
- **Creating a safe and respectful environment encourages participation:** learners feel comfortable sharing ideas and asking questions without fear of judgment, thereby fostering confidence and engagement.
- **Applying the principles of Universal Design for Learning (UDL):** ensuring that learning is accessible in multiple formats—visual, written, or hands-on—so that participants with diverse needs can engage effectively.

Through these methods, learners feel motivated, supported, and empowered to progress at their own pace, while trainers gain practical experience in responding effectively to diversity.

#### 4. Use of feedback and continuous improvement processes.

Feedback is essential for both learners and trainers, forming the backbone of a dynamic and responsive training programme. For learners, clear and specific feedback helps them understand what they are doing well, identify areas for improvement, and stay motivated throughout the learning process. For trainers, feedback collected from participants provides valuable insights into the effectiveness of the training, enabling them to refine content, methods, and pacing to better meet learners' needs.

This creates a continuous improvement cycle: **plan** → **try** → **reflect** → **improve**. Training should not remain static; it must evolve in response to feedback and changing learner profiles. By integrating learners' suggestions and reflecting on outcomes, trainers ensure that the programme remains engaging, practical, and relevant.

Specifically, feedback may help learners in multiple ways:

- It allows them to **make measurable progress and maintain motivation:** by clearly showing areas of strength and opportunities for improvement.
- It enables learners **to engage with learning in ways that are meaningful and tailored** to their starting level, abilities, and prior experience.
- It ensures that participants **benefit from sessions that are continuously refined** based on real learner input, enhancing the relevance and effectiveness of the training.
- It encourages learners to **participate actively in a cycle of reflection and improvement**, modeling principles of lifelong learning and self-directed growth.

In practice, these feedback loops are implemented through the unit's activities, where participants experience first-hand how continuous improvement strategies enhance learner engagement, skill acquisition, and the development of transferable competencies. Linking these activities to practical examples from European entrepreneurship programmes further reinforces the **European Social Fund** priorities, promoting inclusive and effective training across diverse contexts.

## Further Readings and Useful Links

To deepen your understanding of the concepts covered in this unit, the following resources are recommended:

<https://exemplarglobal.org/practical-techniques-to-adapt-training-to-learners-needs/>

<https://trainingindustry.com/articles/strategy-alignment-and-planning/tailored-training-aligning-learners-needs-with-training-methods/>

[https://www.youtube.com/watch?v=ZF\\_taPP1OO4](https://www.youtube.com/watch?v=ZF_taPP1OO4)

## References

- Knowles, M. S., Holton, E. F., & Swanson, R. A. (2015). *The Adult Learner*. Routledge.
- Brookfield, S. D. (2017). *Becoming a Critically Reflective Teacher*. Jossey-Bass.
- Tomlinson, C. A. (2014). *The Differentiated Classroom*. ASCD.

## Practical action points / Can I have some tips?

- Conduct pre-training surveys or interviews to identify learner needs.
- Use differentiated instruction techniques to address mixed skill levels.
- Incorporate real-life, recent case studies and examples.
- Ensure accessibility (materials in multiple formats, inclusive language).
- Collect and act upon learner feedback regularly.

## Evaluating success /Let's evaluate what I learnt!

### Multiple-Choice Quiz

#### 1. What is the main purpose of Training Needs Analysis?

- a) To make training more entertaining.
- b) To identify skill gaps and learner needs.
- c) To check attendance in training sessions.
- d) To design exams for learners.

**(correct answer: b)**

#### 2. Which of the following best describes a learner-centred programme?

- a) Trainer talks most of the time.
- b) Focuses mainly on theory and memorisation.
- c) Learners' needs, goals, and experiences guide the process
- d) Training is the same for all groups regardless of differences.

**(correct answer: c)**

**3. In learner-centred approaches, the trainer's role is mainly to...**

- a) Deliver knowledge as the only expert.
- b) Facilitate and guide learning.
- c) Test learners constantly.
- d) Provide only written materials.

**(correct answer: b)**

**4. What is one key principle of inclusive teaching?**

- a) All learners must follow the same pace.
- b) Only high-performing learners get special support.
- c) Every learner should have equitable access to learning.
- d) Cultural differences should be minimised.

**(correct answer: c)**

**5. What does Universal Design for Learning (UDL) aim to do?**

- a) Make learning faster for advanced students only
- b) Plan from the beginning to support diverse learning needs
- c) Focus only on written content
- d) Standardise all teaching methods

**(correct answer: b)**

**6. What is the main benefit of feedback for learners?**

- a) It increases competition between students
- b) It helps them understand progress and areas for improvement
- c) It makes training shorter
- d) It reduces participation in class

**(correct answer: b)**

**7. Which of these is part of the cycle of continuous improvement?**

- a) Teach → forget → repeat
- b) Plan → try → reflect → improve
- c) Copy → paste → share

d) Start → stop → restart

(correct answer: b)

## Reflection

- How can I adapt my training methods to accommodate different learning styles?
- What strategies can I use to make my programme inclusive for learners with fewer opportunities?
- How can I use feedback loops to improve my training design and delivery?

## References & Bibliography

- Knowles, M. S. (1980). *The Modern Practice of Adult Education: From Pedagogy to Andragogy*. Follett.
- Schön, D. A. (1983). *The Reflective Practitioner: How Professionals Think in Action*. Basic Books.
- UNESCO Institute for Lifelong Learning (2016). *Guidelines for Designing Inclusive Adult Learning Programmes*. Hamburg: UNESCO.

## Tool n°1: Learner Needs Analysis Mapping.

### AIM

To practice identifying and analysing learner profiles before designing a programme.

### LEARNING OUTCOMES

Participants will be able to apply structured tools to understand learners' needs and adapt programme goals accordingly.

### DURATION

60 minutes.

### MATERIALS

- Needs analysis questionnaires and flipcharts (for group mapping)

Current Competencies	Desired Competencies / Goals	Identified Gaps	Suggested Activities / Training Approaches
What learners already know or can do (skills, knowledge, attitudes).	What learners want or need to achieve by the end of training.	The difference between current and desired state.	Training methods, tools, or strategies to bridge the gap (e.g., workshops, case studies, role-play, digital tools).

Example:

Current Competencies	Desired Competencies / Goals	Identified Gaps	Suggested Activities / Training Approaches
Basic digital literacy (can use email, Word).	Confident use of online collaboration platforms (Miro, Teams, Zoom).	Lack of practice with advanced tools.	Hands-on demo, peer practice sessions, guided tutorials.
Can present ideas orally.	Ability to design engaging training materials.	No knowledge of visual design tools.	Training on Canva/PowerPoint, group creation of slides.
High motivation but low confidence in group discussions.	Increased confidence and participation in debates.	Fear of speaking in larger groups.	Role-play, small group activities, supportive feedback.

- Interview guides

Sample questions:

- What skills or knowledge would you like to develop in this programme?
- What challenges or barriers have you faced in previous learning experiences?
- Which learning methods (e.g., discussions, practice, visuals, digital tools) work best for you?
- What motivates you to learn and stay engaged?
- How do you prefer to receive feedback?

Tip for trainers: Keep interviews short (10–15 minutes) and use open-ended questions.

### 3. Online survey tools (for distance /large groups)

Recommended tools:

- Google Forms: Easy to use, free, exportable data. <https://docs.google.com/forms>
- SurveyMonkey: Customizable, with analytics. <https://www.surveymonkey.com/>
- Microsoft Forms: Integrated with MS Teams and Excel. [Έρευνες, ψηφοφορίες και κούιζ | Microsoft Forms](#)
- Mentimeter: Interactive polling & word clouds (good for live sessions). <https://www.mentimeter.com/>

Example survey items:

- Rate your confidence level in [skill/competence]. (1 = very low, 5 = very high)
- What topics do you expect to learn more about? (open-ended)
- Which learning formats do you prefer? (workshops, discussions, online self-study, etc.)
- What barriers might prevent you from fully participating?

## METHODOLOGY

The methodology combines:

- Principles of training needs analysis: Adults learn best when their needs, experiences, and goals are acknowledged.
- Inclusive teaching strategies: Mapping must ensure all learners, including vulnerable groups, have their voices represented.
- Participatory and feedback-driven approaches: Learners actively co-create their learning path, and trainers refine design continuously.
- Gap analysis methods: Comparing current learner competencies with desired outcomes to identify training priorities.

## PROCESS

1. Introduction (10 min) – Trainer explains the purpose of needs analysis and shares examples.
2. Individual Reflection (10 min) – Learners fill a short survey or self-assessment on their goals and needs.
3. Small Group Discussion (15 min) – Learners share insights in pairs/groups.
4. Mapping Exercise (20 min) – Groups create a “Needs Map” on flipchart/poster/online tool.
5. Wrap-up (5 min) – Trainer highlights patterns and connects to training objectives

## TIPS FOR TRAINERS

- Use multiple means of expression (visual, verbal, written) to ensure inclusivity.
- Encourage quieter participants with prompts or smaller group discussions.
- Cross-check the mapped needs with the official learning objectives of the programme.
- Repeat the mapping activity midway through the programme to update evolving needs.

## ASSESSMENT

Completeness of Needs Analysis, Clarity of Mapping, Inclusivity, Reflection and Peer feedback.

## REFERENCES

- Brookfield, S. D. (2017). *Becoming a Critically Reflective Teacher*. Jossey-Bass.
- Cedefop (2015). *Designing Adult Learning Strategies: The Role of Needs Analysis*

## Tool n°2: Inclusive Training Plan Workshop.

### AIM

To create a sample training plan adapted to learner diversity.

### LEARNING OUTCOMES

Learners will integrate inclusivity and adaptability into programme design.

### DURATION

60 minutes.

### MATERIALS

1. Interview guides (for pre-workshop needs clarification)

Sample questions:

- What barriers to participation do you anticipate in this training?
- Which learning methods do you find most supportive?
- How do you prefer to receive learning materials (visuals, text, audio)?
- What type of trainer support helps you learn best?

2. Training plan templates and flipcharts (for group brainstorming)

Example:

Section	Details	Examples / Prompts
<b>Learning Objectives</b>	What should learners achieve by the end?	E.g., “Improve digital collaboration skills,” “Enhance confidence in group discussions.”
<b>Content / Topics</b>	Main areas to be covered	E.g., Introduction to tools, case study practice, group reflection.
<b>Methods &amp; Activities</b>	Teaching approaches and exercises	E.g., Group work, role-play, discussion circles.
<b>Resources Required</b>	Materials and tools needed	Flipcharts, sticky notes, laptops, accessibility tools (subtitles, screen readers).
<b>Accessibility Inclusion Measures</b>	& Adaptations to ensure inclusivity	E.g., Large font materials, alternative formats (audio/text).
<b>Feedback Evaluation</b>	& How feedback will be collected	E.g., Short surveys, peer reflection, online poll.

- Learners add sticky notes under each column.
- Trainer clusters similar ideas and highlights priorities.

## 2. Online Survey Tools

Recommended tools: Google Forms, Mentimeter etc.

Example survey items:

- Which training methods do you prefer?
- Do you need accessibility support (language, digital, physical)?
- What motivates you most in a learning environment?

### METHODOLOGY

- Based on adult learning theory, the activity is problem-centred: learners co-create training plans that respond to real-world contexts.
- Grounded in learner-centred programme design, participants are not passive recipients but active designers of inclusive approaches.
- Uses Universal Design for Learning (UDL) principles: participants plan training that offers multiple means of engagement, representation, and expression, ensuring accessibility.
- Encourages collaborative work to value diverse perspectives and foster inclusivity.
- Reflection and feedback loops connect the workshop to the continuous improvement model.

### PROCESS

1. Introduction (10 min) – Trainer introduces inclusivity principles and examples.
2. Group Work (20 min) – Each group designs a mini-inclusive training plan (objectives, methods, adaptations for diversity).
3. Presentation (20 min) – Groups present their plans and receive peer feedback.
4. Wrap-up (10 min) – Trainer summarizes key lessons, links back to theory, and highlights learner-centered strategies.

### TIPS FOR TRAINERS

- Encourage quieter learners by using anonymous inputs (e.g., digital post-its, surveys).
- Balance between group-wide objectives and individual learning paths.
- Check inclusivity continuously, not only at the start.
- Use concrete examples of inclusive adaptations (subtitles, flexible timing, alternative assessment formats).

### ASSESSMENT

Learners can see their input reflected in the final training plan, feel ownership, and identify accessibility/inclusion measures included.

### REFERENCES

- Cedefop (2017). Designing for Inclusion.
- European Commission (2020). Adult Learning Policy and Practice in Europe

## Tool n°3: Feedback Role-Play Simulation.

### AIM

To strengthen learners' ability to give and receive constructive feedback in training situations, while fostering a culture of reflection and continuous improvement.

### LEARNING OUTCOMES

Learners will be able to practice providing feedback that is clear, constructive, and respectful and recognize the value of feedback for improving training quality and learner engagement.

### DURATION

60 minutes.

### MATERIALS

#### 1. Prompt Cards for Role-Play Scenarios (Each card provides a short training situation)

Prompt Card A

You are explaining a new concept to learners, but some of them look confused. Deliver a 3–5-minute explanation.

Prompt Card B

You are motivating a group of learners who seem disengaged. Deliver a short motivational talk.

Prompt Card C

You are teaching a step-by-step process (e.g., using software, solving a problem). Deliver the instructions clearly.

Prompt Card D

You are answering a challenging question from a learner. Provide a clear and confident response.

#### 2. Feedback Checklist

Template

Criteria	Yes/Partly/No	Comments Notes	/
The trainer's message was <b>clear and structured</b>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
Feedback is <b>specific</b> , not vague	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
Feedback is <b>constructive</b> (focuses on behaviour, not personality)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
Feedback includes <b>positive reinforcement</b>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
Feedback suggests <b>concrete improvements</b>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		

Criteria	Yes/Partly/No	Comments Notes	/
Feedback was delivered <b>respectfully</b>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		

### 3. Flipchart

On a flipchart create 3 columns:

1. What made feedback useful?
2. What made feedback difficult?
3. Lessons for my practice

Participants add sticky notes during the group debrief.

### 4. Online Survey Tools

Recommended tools: Google Forms, Mentimeter etc.

Example survey items:

- What do you find most difficult about giving feedback?
- In your opinion, what makes feedback useful?

Which tool helped you most today?

## METHODOLOGY

Learners understand in practise the importance of feedback. First practice giving feedback in pairs or small groups, focusing on both positive reinforcement and suggestions for improvement. They then rotate roles to experience how it feels to both give and receive feedback, which strengthens empathy and awareness.

## PROCESS

### 1. Introduction (10 min)

- Trainer explains key principles of effective feedback (timely, specific, constructive).
- Share checklist/rubric with participants.

### 2. Role-Play Simulation (25 min)

- Participants form pairs.
- One plays the “trainer” (delivers a 3–5 min micro-training or explanation based on a prompt).
- The other plays the “learner” and provides structured feedback using the rubric.

- Switch roles after the first round.

### **3. Group Debrief (15 min)**

- Trainer facilitates discussion: What made feedback useful? What was challenging?
- Learners compare experiences and strategies.

### **4. Wrap-up (10 min)**

- Trainer summarises lessons learned.
- Emphasise feedback as a tool for growth, not criticism.

## **TIPS FOR TRAINERS**

- Encourage empathy: remind participants that feedback should focus on behaviour, not personality
- Use real-life examples from participants' contexts when possible.
- Keep the atmosphere supportive to avoid defensive reactions.

## **ASSESSMENT**

- Observation of role-play performance.
- Quality of feedback provided (measured against checklist).
- Learner self-reflection on how their approach to feedback has changed.

## **REFERENCES**

- Hattie, J., & Timperley, H. (2007). The Power of Feedback. *Review of Educational Research*, 77(1).

Total Time:

**4** hours

**Learning Unit 10**  
**Adopting an**  
**appropriate**  
**trainer/coach posture**  
**in a face to face or**  
**distant learning**  
**process**

# Learning Unit 10: Adopting an appropriate trainer/coach posture in a face to face or distant learning

## Definition / What is this about?

This unit explores the trainer's role not just as a transmitter of knowledge, but as a facilitator, coach, and guide in both traditional (face-to-face) and digital (distance/online) learning contexts. It emphasizes that effective trainers adopt a dynamic posture, adjusting their attitude, communication style, and methods to fit the diverse needs, experiences, and motivations of learners.

The posture of the trainer involves:

- **Attitude:** Being open, approachable, and empathetic creates a safe learning environment where participants feel **respected, supported, and confident**. This encourages risk-taking, active participation, and engagement.
- **Communication style:** Using **clear, supportive, and culturally sensitive language**, while adapting tone and pace, ensures that all learners can follow, understand, and contribute.
- **Adaptability:** Trainers shift seamlessly between **guiding learners and facilitating autonomy**, responding to learners' confidence, engagement, and context-specific needs.
- **Method selection:** Thoughtful use and combination of activities—interactive discussions, practical exercises, and digital tools—**enhance learning outcomes and engagement**, allowing trainers to tailor experiences to different learning styles and environments.

**Why this matters:** Adopting this posture allows trainers to **co-create meaningful learning experiences**, fostering engagement, reflection, and active application of knowledge, whether in-person or online.

### Example:

- *Face-to-face:* A trainer notices a participant struggling to answer a question. Instead of repeating the material, they ask guiding questions to help the learner express their understanding, while encouraging peers to contribute.
- *Online:* A trainer detects low participation in a chat discussion. They use polls or breakout rooms to create smaller, safer spaces for engagement and follow up individually if needed.

By adopting this posture, trainers move beyond delivering content toward **co-creating an engaging and supportive learning journey** that works across in-person and virtual settings.

## Trainer/Coach Posture – Key Elements (Visual Overview)

Posture Element	Purpose / Why it Matters	Practical Impact
Attitude	Creates a safe, respectful environment	Learners feel confident to participate and share ideas
Communication Style	Ensures clarity and inclusivity	Learners understand content and are motivated to engage
Adaptability	Balances guidance and autonomy	Supports learners at their own pace and according to needs
Method Selection	Uses appropriate activities for engagement	Learning becomes interactive, effective, and context-sensitive

## Learning Objective / What can I learn?

By the end of this unit, participants will be able to:

- Strengthen the trainer's posture and adaptability to effectively respond to diverse learner profiles, experiences, and confidence levels.
- Design and deliver engaging learning processes that integrate both face-to-face and distance learning activities.
- Foster empathy and active listening to build trust and support learner needs.
- Facilitate positive group dynamics while confidently leading training sessions in varied contexts.

## Introduction / What is included?

This unit provides a thorough exploration of the trainer/coach role, positioning trainers not just as knowledge deliverers, but as facilitators, guides, and coaches who actively shape learning experiences. The content combines theoretical insights with practical strategies, emphasizing how a well-adapted posture directly influences learner engagement, confidence, and outcomes.

Participants will first be introduced to the definition of trainer/coach posture, which highlights the balance between guiding learners and fostering autonomy. This includes understanding the trainer's attitude, communication style, adaptability, and method selection, all of which contribute to creating a safe, inclusive, and stimulating learning environment. By framing posture in this way, the unit encourages trainers to move beyond routine teaching and adopt a learner-centered, responsive approach.

The unit also focuses on evaluation of learning and support, showing how continuous observation, feedback, and reflection enable trainers to respond effectively to learner needs. Participants will explore both formal evaluation methods—such as quizzes, surveys, or assignments—and informal approaches, including reflection exercises, peer observation, and dialogue-based feedback. These methods allow trainers to monitor understanding, adjust methods, and ensure learners are supported throughout their journey.

Finally, the unit addresses practical application, offering examples and exercises for both face-to-face and digital contexts. Trainers will practice adopting a flexible posture, using interactive activities, guiding discussions, and providing tailored support, all while maintaining a positive and motivating environment.

By the end of this unit, participants will not only understand the theoretical foundations of trainer posture but will also gain practical skills to evaluate, adapt, and support learners, ensuring effective and engaging learning experiences across diverse settings.

## Contextualization / Why do I need to invest my time on this?

Adopting an appropriate trainer/coach posture is **critical for effective learning**, particularly for young entrepreneurs who benefit from guidance that goes beyond traditional knowledge delivery. This unit emphasizes that trainers are not just conveyors of content—they are **facilitators, coaches, and guides** who actively shape learners' experiences and outcomes.

By investing time in this unit, trainers develop the ability to **adapt their posture to different contexts and learner profiles**, ensuring that each participant feels understood, supported, and motivated. This involves applying coaching techniques, demonstrating empathy, and maintaining presence in both face-to-face and digital learning environments.

**For learners**, an appropriate trainer posture creates a **safe, inclusive, and engaging space**. Participants are more likely to participate actively, reflect on their learning, and apply new skills in practice. Learners gain confidence, develop critical thinking, and feel empowered to take ownership of their learning journey.

**For trainers**, mastering posture strengthens **professional confidence and flexibility**. Trainers learn to navigate diverse group dynamics, respond to varying levels of learner engagement, and balance guidance with autonomy. These skills enable trainers to deliver learning experiences that are not only effective but also **meaningful and motivating**.

**For the learning process as a whole**, adopting a reflective and responsive trainer posture fosters **continuous evaluation and support**, ensuring that learning is **interactive, learner-centered, and adaptable**. Trainers become capable of creating hybrid learning experiences that seamlessly integrate face-to-face and online activities while maintaining engagement, participation, and impact.

**Key takeaway:** Investing in this unit equips trainers with **the knowledge, skills, and practical strategies** to facilitate learning that is not only efficient but also empowering, inclusive, and highly effective, setting the foundation for a **dynamic, learner-centered training approach**.

## Theoretical approach

### 1. The definition of the trainer/coach posture

Trainer/coach posture refers to the way a trainer behaves, communicates, and supports learners during a learning process. It means finding the right balance between guiding and listening, motivating learners, and adapting to different situations, whether teaching face-to-face or online. A good trainer shows empathy, flexibility, and helps learners feel confident and included. Beyond transferring knowledge, the trainer's posture is about creating a safe and engaging environment where learners feel valued and respected. It involves adopting an open attitude, encouraging participation, and being attentive to individual needs and group dynamics. In practice, this means adapting to communication style, using clear and supportive language, and being aware of cultural and personal differences. In digital contexts, posture also requires maintaining presence through interaction, feedback, and encouragement, even without physical contact. Overall, the trainer/coach posture is not static—it evolves depending on

learners' progress, needs, and challenges, always aiming to build trust, motivation, and active engagement in the learning process.

From a theoretical standpoint, this aligns with **adult learning principles (Knowles, 1980)**, which emphasize learner-centered approaches, experiential learning, and fostering autonomy. It also draws on **constructivist learning theory (Vygotsky, 1978)**, highlighting the role of social interaction and guided support in constructing knowledge

The main characteristics of an appropriate trainer/coach posture are:

- Respecting learners' prior knowledge and experiences.
- Acting as a facilitator, not just a lecturer.
- Showing empathy and building trust.
- Encouraging active participation and reflection.
- Adapting to both face-to-face and online contexts.
- Motivating and supporting learners to achieve their goals.
- Clarity in communication – using simple, supportive, and respectful language.
- Inclusivity and fairness – ensuring all learners feel valued, respected, and included.
- Presence and availability – being attentive and responsive both in person and online.

## 2.Evaluation of learning and supporting

Evaluation of learning and supporting learners is an essential part of the training process because it ensures that knowledge is not only delivered but also understood, applied, and integrated into practice. Evaluation goes beyond testing knowledge; it involves observing how learners engage, monitoring their progress, and identifying strengths as well as areas where additional support is needed. A good trainer uses both formal and informal evaluation methods: structured tools such as quizzes, surveys, or assignments, and more interactive approaches such as feedback discussions, reflection exercises, or observation of group work. Supporting learners is closely connected to evaluation, as the information gained helps the trainer adapt their posture, provide encouragement, and offer additional resources or guidance. An effective trainer creates a safe space where feedback flows in two directions-learners receive constructive input to improve, while trainers gather insights to refine their teaching. In face-to-face settings, this may mean observing body language, participation, or energy levels, while in online environments, it could include monitoring digital engagement, chat participation, or completion of activities. Importantly, supporting learners also means acknowledging their diverse needs-such as different learning speeds, cultural backgrounds, or personal challenges-and offering tailored support where possible. Evaluation and support are therefore not one-off actions but continuous processes that strengthen learner confidence, build self-reflection, and foster a deeper sense of ownership in the learning journey.

### Evaluation Methods:

- Self-Assessment Questionnaires - Trainers assess their posture before and after training.
- Peer Observation Feedback - Colleagues observe role-play and give feedback.
- Practical Demonstrations - Learners demonstrate trainer posture in simulated scenarios.
- Reflection Questions (e.g. How do I adapt my posture to different learner groups?).

### Supporting Learners:

- Ongoing Feedback: Continuous formative feedback during practice.
- Coaching Circles: Small peer groups to reflect and share strategies.

- Digital Toolkits: Provide resources (checklists, templates, recordings).
- Mentoring: Pair less experienced trainers with senior peers.

## Practical action points / Can I have some tips?

Adopting an effective trainer/coach posture requires **intentional practice, reflection, and adaptation**. The following practical steps translate theoretical insights into actionable strategies for both face-to-face and online contexts:

### 1. Active Listening and Open Questioning

- Practice **listening fully** to learners before responding.
- Use open-ended questions to stimulate reflection and engagement.
- Example: “Can you describe how you approached this challenge?”

### 2. Observe and Adapt

- Continuously monitor learner engagement, body language, and interaction.
- Adjust your communication style, pacing, and activities based on observed needs.
- Example: If participants seem hesitant, switch from large-group discussion to small breakout groups or paired exercises.

### 3. Balance Guidance with Autonomy

- Alternate between direct instruction and facilitating learner-led exploration.
- Encourage learners to take ownership of problem-solving while offering support where needed.
- Example: Present a challenge and let learners propose solutions, providing guidance only if they get stuck.

### 4. Use Clear, Supportive, and Inclusive Communication

- Adapt language to be simple, culturally sensitive, and encouraging.
- Recognize and validate diverse perspectives, ensuring everyone feels included.
- Example: Reframe incorrect answers as learning opportunities: “That’s an interesting perspective—let’s explore it together.”

### 5. Foster Reflection and Feedback

- Integrate structured reflection exercises before, during, and after activities.
- Encourage peer feedback and self-assessment to reinforce learning.
- Example: Use short reflection prompts: “What did I learn about my approach to problem-solving today?”

### 6. Leverage Digital Tools Thoughtfully

- In online contexts, maintain social presence using video, polls, chat, and interactive exercises.
- Ensure learners feel connected and supported, even without physical interaction.
- Example: Create a digital discussion board for ongoing reflections and questions.

### 7. Build Trust and Motivation

- Show empathy, acknowledge learners’ efforts, and celebrate small achievements.
- Maintain consistency and fairness to build credibility.
- Example: Begin each session with a brief check-in to show interest in learners’ experiences.

### 8. Engage in Continuous Self-Reflection

- After each session, reflect on your posture: what worked, what could be improved.
- Use peer observations, mentoring, and self-assessment tools to refine your approach.
- Example: Ask yourself: “Did I balance guidance and autonomy effectively?”

## Evaluating success /Let's evaluate what I learnt!

### Multiple-Choice Quiz

**1."During a training session, a few participants seem hesitant to share their ideas. Which approach best demonstrates an effective trainer/coach posture to support all learners?"**

- a) Actively guiding discussions, adapting communication to encourage participation, and providing tailored support
- b) Focusing solely on delivering all content as planned
- c) Ignoring participants' hesitation and continuing with the session as usual
- d) Paying attention only to the participants who are most confident

**(correct answer a)**

**2. A trainer with the right posture should:**

- a) Talk without listening to learners
- b) Respect learners' knowledge and encourage participation
- c) Focus only on finishing the content quickly
- d) Avoid interaction in class

**(correct answer: b)**

**3. A trainer is delivering a workshop to a diverse group of learners. Some participants are struggling to follow the material. Which action demonstrates good trainer posture?"**

- a) Adapting teaching methods and activities to meet learners' individual needs
- b) Using the same teaching style regardless of learners' abilities
- c) Ignoring feedback and continuing with the original plan
- d) Speaking most of the time without giving learners a chance to participate

**(correct answer: a)**

**4. Which of the following is NOT a main characteristic of an appropriate trainer posture?**

- a) Empathy and trust-building
- b) Respect for learners' knowledge
- c) Using one method for all learners without adaptation
- d) Encouraging reflection and participation

**(correct answer: c)**

**5. In online learning, trainer posture should include:**

- a) Ignoring interaction and focusing on content delivery
- b) Creating social presence and fostering engagement
- c) Avoiding the use of digital tools
- d) Giving learners no autonomy in learning

**(correct answer: b)**

**6.What is the main purpose of evaluating learning during a training process?**

- a) To test learners with difficult questions
- b) To check only if learners memorized information
- c) To ensure knowledge is understood, applied, and supported
- d) To grade learners and compare them with each other

**(correct answer: c)**

**7.What does effective learner support involve?**

- a) Giving the same instructions to all learners, regardless of needs
- b) Providing encouragement and adapting to diverse learner needs
- c) Only correcting mistakes when learners fail
- d) Monitoring attendance without interaction

**(correct answer: b)**

**8.Which of the following best describes continuous evaluation?**

- a) A one-time test at the end of the course
- b) A final group presentation only
- c) Occasional quizzes without feedback
- d) Ongoing assessment and support throughout the learning process

**(correct answer: d)**

## Reflection

- When do I naturally adopt a trainer role, and when do I shift into a coach role? How does this affect my learners?
- How do I adapt my posture to online environments compared to face-to-face settings?
- What personal strengths and challenges shape my ability to create trust and motivation as a trainer/coach?
- How can empathy improve my effectiveness as a trainer?

## References & Bibliography

- <https://www.open.edu/openlearn/education-development/learning-teach-becoming-reflective-practitioner/content-section-0?active-tab=description-tab>
- <https://elearningindustry.com/the-adult-learning-theory-andragogy-of-malcolm-knowles>

## Tool n°1: Trainer Posture Self-Reflection Exercise.

### AIM

Enable trainers to reflect on their teaching posture, identify personal strengths, and recognize areas for improvement, linking theory with practice. This exercise can be conducted either face-to-face (F2F) or online, providing flexible options for trainers to engage in reflective practice according to their context.

### LEARNING OUTCOMES

Learners will demonstrate flexibility in adapting communication, facilitation, and coaching strategies to different contexts.

Participants will be able to:

- Flexibly adapt communication, facilitation, and coaching strategies to diverse learning contexts.
- Apply reflective practice principles to their own teaching.
- Demonstrate awareness of inclusive and supportive learning environments

### DURATION

40 minutes.

### MATERIALS

1. Self-reflection questionnaire (paper-based for F2F / digital for online)
2. Flipcharts & sticky notes (F2F)
3. Virtual flipchart & online survey tools (Google Forms) for online

Template

Dimension of Trainer Posture	Self-Assessment (1–5)	Reflection Notes
I adapt my communication style to learners' needs.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	...
I listen actively and rephrase learners' ideas.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	...
I create an inclusive and supportive learning environment.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	...
I balance trainer authority with learner autonomy.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	...
I adapt my posture when training online vs. face-to-face.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	...
I use feedback from learners to improve my posture.	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	...

4. Flipcharts

Example: A flipchart divided into 3 columns:

1. Trainer Posture Strengths
2. Challenges I Face

## 5. Ideas for Improvement

- Each participant writes on sticky notes and places them under the headings.
- Trainer clusters similar notes and highlights key patterns.

## 6. Online Survey Tools

To replicate the exercise virtually, trainers can use:

- Google Forms / Microsoft Forms
- Mentimeter
- Live polls (“How confident are you in adapting posture online?”).
- Word clouds (“What’s your biggest trainer posture strength?”).

Virtual flipchart: learners post digital sticky notes under the three columns (Strengths – Challenges – Improvements)

## METHODOLOGY

- Based on experiential learning: learning from reflection on experience.
- Constructive alignment: linking theory (trainer posture concepts) with personal practice.
- Peer learning: sharing reflections enhances awareness and builds group trust.

## PROCESS

F2F: Participants complete self-assessment, share in small groups, cluster notes on flipchart.

Online: Participants complete self-assessment digitally, post reflections on virtual flipchart, participate in polls or discussion boards.

1. Self-assessment questionnaire (10 min)
2. Plenary debrief – highlight key strengths and challenges (15 min).

## TIPS FOR TRAINERS

- Encourage honest reflection and ensure a non-judgmental atmosphere.
- Provide examples (e.g., “How do you adapt posture when learners are disengaged?”).
- Emphasize flexibility: encourage participants to choose the mode that suits their context.

## ASSESSMENT

- Trainers complete a “before and after” self-assessment to track awareness gains.
- Peer feedback is used to validate reflections.

## REFERENCES

- Osmanović Zajić, J., Maksimović, J. Ž., & Sretić, S. R. (2023). Reflective practice: The online teaching quality in the time of the Coronavirus pandemic. University of Niš, Republic of Serbia. Available online: <https://files.eric.ed.gov/fulltext/EJ1379901.pdf>
- TeachHQ (n.d.). Carl Rogers’ Humanistic Education Approach. Available online: <https://teachhq.com/article/show/carl-rogers-humanistic-education-approach>

## Tool n°2: Inclusive Training Scenarios Workshop.

### AIM

To practice learners adopting inclusive and effective trainer postures. This workshop can be conducted either face-to-face (F2F) or online, providing flexible options for learners to practice inclusive trainer postures according to their context.

### LEARNING OUTCOMES

By the end of this activity, learners will be able to:

- Demonstrate adaptability by applying different trainer/coach postures to diverse and challenging training scenarios.
- Practice inclusive strategies that engage learners from varied cultural, linguistic, and ability backgrounds.
- Analyse group dynamics and propose posture adjustments that foster participation and trust.
- Reflect on feedback from peers and integrate it into their trainer posture for future sessions.

### DURATION

40 minutes.

### MATERIALS

F2F: Pre-written scenarios, feedback forms, flipcharts, sticky notes, observation checklists.

Online: Pre-written scenarios shared via PDF/Docs, digital observation checklists (Google Forms), virtual flipchart (Miro, Jamboard, MURAL), online polls / chat for feedback.

1. Pre-written training scenarios and feedback forms

Scenario

Example:

You are leading an online training session. Half of the learners keep cameras off and don't respond to questions. How do you adapt your trainer posture to engage them?

Roles:

1. Trainer
2. Learner(s)
3. Observer

Observer Checklist:

Trainer Posture Element	Observed (✓/X)	Notes
-------------------------	----------------	-------

Shows empathy towards learners		
--------------------------------	--	--

Adapts communication to group dynamics		
--	--	--

Uses inclusive strategies (polls, chat, breakout rooms)		
---	--	--

Encourages participation of silent learners		
---	--	--

Trainer Posture Element Observed (✓/X) Notes

Provides constructive feedback

(Observers give feedback after each role-play round)

7. Flipchart

- Divide the flipchart into 4 columns:
  1. Scenario Challenges - What difficulties did the trainer face?
  2. Trainer Posture Responses - How did the trainer adapt?
  3. Inclusion Strategies - What actions ensured all learners were engaged?
  4. Key Lessons Learned - What should trainers remember for future practice?
  
- After each role-play, groups add sticky notes in each quadrant.

By the end, the flipchart becomes a visual map of inclusive posture strategies

## PROCESS

### F2F:

1. Distribute short scenarios with diverse learners (5 min).
2. Group discussion in person - strategies for inclusion(15 min).
3. Role-play, using observers and flipcharts (15 min).
4. Brief Plenary wrap-up (5 min).

### Online:

1. Share scenarios digitally (PDF / Docs) (5 min).
2. Group discussion in breakout rooms (Zoom / Teams) (15 min).
3. Role-play in breakout rooms; observers fill digital checklists; post reflections on virtual flipchart (15 min).
4. Plenary wrap-up via shared screen / online board (5 min).share in small

## TIPS FOR TRAINERS

- Choose realistic scenarios based on learners' experience.
- Rotate roles so all participants practice being the trainer.
- Emphasise inclusion: ensure scenarios include diverse learner needs (cultural, linguistic, digital, disability).
- Encourage constructive, supportive feedback.
- Highlight flexibility: learners can choose F2F or online.

## ASSESSMENT

- F2F: Observation checklists, reflection notes, peer feedback.
- Online: Digital observation checklists, virtual sticky notes, chat contributions, peer feedback.

## REFERENCES

- Fryling, M. J., Johnston, C., & Hayes, L. J. (2011). Understanding Observational Learning: An Interbehavioral Approach. *The Analysis of Verbal Behavior*, 27(1), 191-203. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3139552/>
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## Tool n°3: Active Listening Role-Play.

### AIM

To develop empathy and communication posture. This role-play exercise can be conducted either face-to-face (F2F) or online, providing learners with flexible options to develop and practice active listening skills in diverse learning contexts.

### LEARNING OUTCOMES

Learners will be able to demonstrate effective active listening skills that foster trust and engagement in learning environments.

### DURATION

40 minutes.

### MATERIALS

#### 1. Role-Play Script

**F2F:** Printed role-play scripts, observation sheets, pens, space for pair work.

**Online:** Digital role-play scripts (PDF / Docs), online observation sheets (Google Forms), breakout rooms for pairs, chat / video for feedback.

Template

Example:

#### Scenario Example 1

Learner: "I'm struggling with the material. I don't think I can keep up with the rest of the group."

Trainer: Respond using active listening (paraphrase, clarify, ask questions).

#### Scenario Example 2

Learner: "I'm not comfortable speaking in front of others. I feel embarrassed when asked to give a present."

Trainer: Respond by acknowledging feelings and encouraging participation.

#### Scenario Example 3

Learner: "I already know most of this content. I'm getting bored."

Trainer: Respond by validating their knowledge and suggesting ways to stay engaged.

#### 2. Observation Sheet

Behaviour Observed	Yes	Somewhat	No	Notes
Trainer maintained eye contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Trainer paraphrased the learner's message	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Trainer asked open-ended questions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Trainer acknowledged learner's feelings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Trainer avoided interrupting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

## METHODOLOGY

- Rooted in the concept of active listening
- Emphasis on developing listening as a deliberate skill
- Learners practice paraphrasing, clarifying, and responding empathetically, which reflects the principle that effective communication requires both verbal and non-verbal attentiveness
- Learning cycle: learners reflect on their behaviours, receive feedback, and reapply improved strategies.

## PROCESS

### F2F:

1. Trainer introduces active listening principles (5 min).
2. Pairs role-play dialogues in person (15 min).
3. Switch roles and repeat (10 min).
4. Group reflection and discussion in plenary (10 min).

### Online:

1. The trainer introduces principles via video call (5 min).
2. Participants join breakout rooms for role-play (15 min).
3. Switch roles in breakout rooms (10 min).
4. Share reflections using chat, polls, or a virtual whiteboard (10 min).

## TIPS FOR TRAINERS

- Emphasize body language, paraphrasing, and open-ended questions.
- For online: pay attention to verbal cues, tone, and virtual body language; encourage participants to use video when possible.

## ASSESSMENT

- Trainer observes active listening behaviours; peer feedback.
- F2F: Observation sheets completed by trainer and peer feedback.
- Online: Digital observation sheets, peer feedback via chat or breakout room discussion.

## REFERENCES

- Blayone, T. J., Gilbert, R., & Harkness, W. (2017). Democratizing digital learning: theorizing the fully online learning community model. *International Journal of Educational Technology in Higher Education*, 14, 20. <https://educationaltechnologyjournal.springeropen.com/articles/10.1186/s41239-017-0051-4>
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## Tool n°4: Posture in Action – Case Study Analysis.

### AIM

To apply posture strategies to realistic situations. This case study analysis can be conducted either face-to-face (F2F) or online, providing learners with flexible options to apply trainer posture strategies in realistic scenarios.

### LEARNING OUTCOMES

Learners will be able to evaluate trainer behaviours in real-world scenarios and propose effective strategies for improvement.

### DURATION

40 minutes.

### MATERIALS

**F2F:** Printed case study handouts, flipcharts, sticky notes, pens.

Online: Digital case study handouts (PDF/Docs), virtual flipchart (Miro, Jamboard, MURAL), digital sticky notes, breakout rooms for group discussion.

### Example

#### Case Study 1 – Online Training Session

A trainer is conducting a distance learning session. Several learners are silent and disengaged, while one participant dominates the discussion. The trainer continues delivering the content without addressing the imbalance.

Discussion Questions:

- What trainer posture strengths do you notice?
- What weaknesses or missed opportunities are evident?
- How could the trainer adapt their posture to improve learner engagement?

#### Case Study 2 – Face-to-Face Session

In a classroom setting, a learner with a disability is struggling to access the training material. The trainer notices but does not intervene, focusing only on finishing the planned content.

Discussion Questions:

- What are the risks of this trainer's approach?
- What inclusive strategies could the trainer use?
- How would you have handled this differently?

### Flipchart

On a flipchart create 3 columns:

1. Strengths of trainer posture.
2. Weaknesses of trainer posture.

### 3. Adaptations/Improvements.

Participants add sticky notes during the group debrief.

## METHODOLOGY

- Reflective teaching and reflective practice.
- Learners are encouraged to critically evaluate trainer behaviours, distinguishing between effective and ineffective postures.
- Adaptive teaching emphasizing responsiveness and flexibility.

## PROCESS

### F2F:

1. Read and reflect on case study (5 min).
2. Small group analysis of trainer posture strengths and weaknesses (15 min).
3. Group presentations (15 min).
4. Trainer summary and key takeaways (5 min).

### Online:

1. Read and reflect on case study digitally (5 min).
2. Small group analysis in breakout rooms, post notes on virtual flipchart (15 min).
3. Group presentations via screen share / shared board (15 min).
4. Trainer summary and key takeaways shared online (5 min).

## TIPS FOR TRAINERS

- Ensure case studies are relatable and include both positive and negative examples.
- Encourage discussion in breakout rooms online to replicate F2F group dynamics.

## ASSESSMENT

- F2F: Group presentations evaluated by clarity and practicality.
- Online: Group presentations or digital boards evaluated by trainer; peer feedback via chat/comments.

## REFERENCES

- McLeod, S. (2025, March 19). *Kolb's learning styles and experiential learning cycle*. Simply Psychology. <https://www.simplypsychology.org/learning-kolb.html>

Total Time:

**6** hours

# Learning Unit 11

## E-Learning Methods and Tools process

# Learning Unit 11: E-Learning Methods and Tools process

## Definition / What is this about?

This unit focuses on **E-Learning Methods and Tools**, equipping VET trainers with the ability to design, deliver, and assess engaging, inclusive, and effective online training. It explores how to choose suitable digital platforms, create participative distance learning activities, foster interaction in virtual environments, and apply innovative methods such as gamification and active learning. Trainers will also learn how to support learner motivation, manage digital fatigue, and ensure accessibility and equity in online settings.

It equips VET trainers with the knowledge and skills to design, deliver, and evaluate engaging, inclusive, and effective online training. Beyond simply using digital platforms, it emphasizes understanding learner needs, promoting interaction, and applying pedagogical strategies that enhance motivation and retention. Participants explore both synchronous (real-time) and asynchronous (self-paced) modalities, collaborative approaches, gamification, and active learning methods. The unit also addresses critical challenges, including digital fatigue, accessibility, equity, and learner engagement in online settings.

The core components covered include:

- **Digital Platforms** – Selecting tools like Moodle, Google Classroom, Teams, or Zoom for course delivery, collaboration, and communication.
- **Interactive Methods** – Using quizzes, polls, discussion forums, and collaborative boards (e.g., Mentimeter, Padlet) to encourage participation.
- **Instructional Design Principles** – Structuring content, activities, and assessments for clarity, inclusivity, and adaptability.
- **Learner Support** – Techniques to foster motivation, monitor progress, and provide timely feedback.
- **Innovative Strategies** – Applying gamification, active learning, and participatory methods to sustain engagement.

## Learning Objective / What can I learn?

By completing this unit, the VET trainer will learn to:

- **Identify and compare e-learning platforms** and select appropriate tools based on training objectives and learner needs. For example, Zoom can be used for breakout rooms and collaborative whiteboard activities to enhance interaction and engagement.
- **Design structured online training courses** that promote interaction, engagement, and collaboration among participants.
- **Develop distance learning activities** using digital tools that encourage participation and support various learning styles.
- **Apply instructional design principles** to manage group dynamics effectively in virtual environments.
- **Enhance learner engagement** using active learning strategies, gamification, and participatory methods.
- **Assess learners remotely** using a range of digital assessment tools and methods.
- **Monitor learner progress** and adapt course content and assessment techniques based on data and feedback.

- **Support inclusive and equitable learning environments**, addressing challenges such as digital fatigue and accessibility.

## Introduction / What is included?

This unit provides a comprehensive exploration of e-learning methods, tools, and pedagogical strategies for vocational trainers. It goes beyond a simple “how-to” approach, helping trainers understand the why and how of designing effective online learning experiences. Participants will learn to create courses that are not only digitally functional but engaging, interactive, and learner-centered, supporting a wide range of learning styles, backgrounds, and needs.

The unit includes:

- 1. Digital Platforms and Tools:** Trainers will explore popular e-learning platforms such as Moodle, Google Classroom, Microsoft Teams, and Zoom. They will learn how to set up courses, manage communication, organize collaborative activities, and monitor learner progress. Emphasis is placed on selecting the right platform for the training goals and learner **profile**.
- 2. Interactive and Participatory Methods:** The unit introduces digital tools like Mentimeter, Padlet, and Kahoot, which facilitate quizzes, live polls, brainstorming, and collaborative reflection. Trainers learn how to design interactive activities that encourage participation, discussion, and peer learning.
- 3. Instructional Design Principles:** Trainers are guided through the process of structuring online courses, integrating learning objectives, activities, and assessments coherently. Focus is placed on applying pedagogical frameworks that promote engagement, retention, and practical skill development.
- 4. Learner Motivation and Support:** The unit emphasizes strategies to sustain motivation, overcome digital fatigue, and provide effective feedback. Trainers learn to recognize challenges such as low engagement, accessibility issues, and diverse learning paces, and to adapt their approach accordingly.
- 5. Innovative Approaches and Emerging Technologies:** Participants are introduced to gamification, active learning, and AI-driven solutions that personalize learning paths and simulate workplace environments. Trainers explore practical examples of how these methods can enhance interaction, critical thinking, and practical skill acquisition.
- 6. Assessment and Monitoring:** Trainers will learn how to apply digital assessment methods, including quizzes, peer evaluation, and learning analytics dashboards, to measure learner progress and adjust course content. Continuous evaluation is emphasized as part of a responsive, learner-centered approach.

By the end of this unit, trainers will be able to design, facilitate, and evaluate online courses that are dynamic, inclusive, and effective, ensuring that vocational learners acquire both theoretical knowledge and practical skills through engaging digital experiences. This introduction frames e-learning as a strategic tool for fostering meaningful learning, not just a digital alternative to face-to-face teaching.

## Contextualization / Why do I need to invest my time on this?

In the current landscape of vocational education and training, technology is no longer optional—it is central to delivering effective, accessible, and engaging learning experiences. E-learning tools provide trainers with the ability to reach learners across distances, tailor content to individual needs, and create interactive learning environments that traditional classrooms cannot always offer.

Investing time in this unit allows trainers to develop the skills needed to design, deliver, and evaluate online learning in ways that maximize engagement, motivation, and skill acquisition. By understanding both the pedagogical principles and the practical application of digital tools, trainers can:

- **Foster active and participatory learning:** Move beyond passive content delivery by creating experiences where learners collaborate, reflect, and apply knowledge in real-world scenarios.
- **Adapt to diverse learner profiles:** Address differences in prior knowledge, digital literacy, learning styles, and access to technology, ensuring equity and inclusivity.
- **Mitigate challenges of distance learning:** Identify strategies to combat digital fatigue, maintain motivation, and support learners remotely, sustaining engagement even in asynchronous or hybrid settings.
- **Integrate innovation effectively:** Leverage gamification, AI-driven learning analytics, and adaptive tools to personalize learning pathways and provide timely feedback.
- **Strengthen vocational relevance:** Ensure that online courses not only convey theoretical knowledge but also build practical competencies, preparing learners for workplace tasks and collaborative projects.

Ultimately, this unit equips trainers with the strategic competence to transform online education into a meaningful, learner-centered process, rather than a temporary substitute for face-to-face instruction. For vocational education, where hands-on skills and real-world application are paramount, mastering e-learning methods is essential for achieving measurable learning outcomes and long-term learner success.

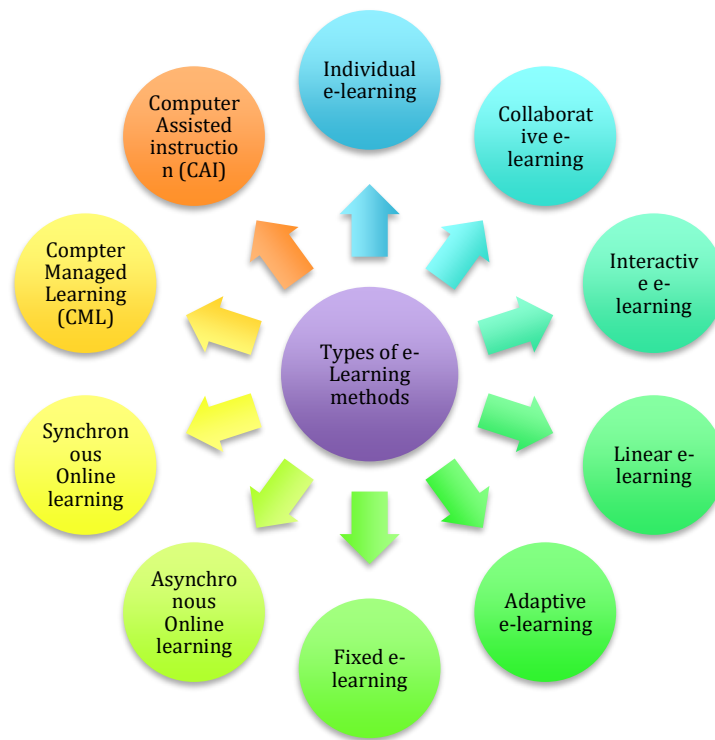
## Theoretical approach

### 1. Introduction on e-learning.

E-learning refers to education or training delivered through digital platforms, often supported by the internet and mobile technologies. Unlike traditional classroom-based learning, e-learning can be asynchronous, flexible, and multimedia-rich, offering new opportunities for vocational training. According to Clark and Mayer (2016), effective e-learning combines instructional design principles with interactive technology to improve learner engagement and knowledge retention. For VET trainers, e-learning opens possibilities to reach diverse learners, deliver practical training modules online, and integrate simulations that mirror workplace environments.

### 2. Types & methods of e-learning

There are several models of e-learning relevant to vocational education. Synchronous learning involves real-time interaction between trainers and learners (e.g., via Zoom or Microsoft Teams), while asynchronous learning allows learners to access materials at their own pace through Learning Management Systems (e.g., Moodle, Google Classroom). Collaborative e-learning uses forums, group projects, and peer review to mirror workplace teamwork. According to Garrison and Vaughan (2008), blended learning—combining online with face-to-face activities—is especially effective in vocational settings, where hands-on skills must be reinforced with theory.



Source: <https://www.mastersoft.ai/blog/navigating-the-future-of-education>

### 3.The future with AI

Artificial Intelligence (AI) is reshaping education by enabling personalization, automation, and predictive analytics. In vocational training, AI can support adaptive assessment, intelligent tutoring systems, and even simulate workplace scenarios using virtual reality. Holmes et al. (2019) argue that AI in education enhances personalization but raises ethical concerns around data privacy and fairness. For VET trainers, AI tools can help identify learner progress, tailor practice modules, and free up time to focus on coaching and mentoring. Trainers will show practical applications that can improve learner engagement, skill acquisition, and workplace readiness.

Source: <https://rows.com/blog/post/ai-tools-for-small-businesses>

## References & Bibliography

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- Green, T. D. (2022). *The Educator's Guide to Remote Learning: Using Zoom, Teams, and Google Classroom Effectively*.

## Practical action points / Can I have some tips?

### Start Small with Tools and Activities

Begin by introducing one or two digital tools or a short, focused online activity to ensure both you and the learners are comfortable. For example, start with a quick collaborative activity in Padlet or a short poll in Mentimeter before attempting more complex exercises.

This builds confidence and reduces cognitive overload for learners new to digital platforms.

**Promote Active Learning:** Design activities that require learners to participate, reflect, and apply knowledge rather than passively consuming content. Examples include breakout room discussions, peer review exercises, scenario-based simulations, or problem-solving tasks. Active engagement improves knowledge retention and learner motivation.

**Assess Digital Literacy and Accessibility:** Before launching the full course, evaluate learners' access to devices, connectivity, and digital skills. This allows you to tailor activities, provide extra support where needed, and prevent disengagement due to technical difficulties. Consider creating a brief tech-orientation session for learners who need it.

**Blend Synchronous and Asynchronous Methods:** Combine live sessions (e.g., Zoom or Teams) with self-paced learning (e.g., Moodle or Google Classroom). Synchronous sessions build interaction, social presence, and collaboration, while asynchronous activities allow learners to reflect, practice, and review content independently.

**Integrate AI Tools Gradually:** Use AI-supported tools strategically, starting with low-risk applications such as automatic quizzes, feedback summaries, or adaptive learning simulations. AI can help monitor progress, identify areas of difficulty, and provide personalized learning paths, but should complement—not replace—human guidance.

**Balance Trainer and Coach Roles:** Alternate between direct instruction (trainer role) and facilitating autonomy (coach role) depending on learner needs and engagement levels. Encourage learners to take ownership of their learning while providing structured guidance when necessary. This fosters confidence, motivation, and self-directed learning skills.

**Monitor and Adapt Continuously:** Collect ongoing feedback from learners using polls, discussion boards, or brief check-ins. Use these insights to adapt pacing, methods, and tools throughout the course, ensuring that learning remains relevant, engaging, and accessible.

**Encourage Collaboration and Reflection:** Create opportunities for learners to interact, share experiences, and reflect on their learning journey. Tools like Padlet, shared documents, and discussion forums can facilitate collaborative reflection, strengthening understanding and group cohesion.

## Evaluating success /Let's evaluate what I learnt!

### Multiple-Choice Quiz

**Which of the following is an example of asynchronous learning?**

- A) Live Zoom workshop
- B) Online discussion forum where learners post at their own pace**
- C) Real-time virtual lab session
- D) Face-to-face classroom lecture

**A trainer wants to deliver a course where learners can access theory online at their own pace but still attend hands-on workshops for practical skills. Which statement BEST describes the learning approach?**

- A) Fully e-learning, because all content is online
- B) Blended learning, combining online theory with in-person practical sessions
- C) Traditional classroom learning, since hands-on workshops are required
- D) Distance learning, because learners are not in the same location for theory

**Which of the following is a benefit of using Padlet?**

- A) Encourages learner collaboration and participation**
- B) Automatically grades practical skills
- C) Replaces face-to-face training entirely
- D) Provides AI-generated content for learners

**Which feature of Padlet supports organizing learner ideas in a start-up brainstorming session?**

- A) Columns, grids, or timelines**
- B) Only a blank screen without categories
- C) Automated grading
- D) Static PDF uploads

**In a Zoom breakout room, learners are supposed to collaborate on a problem-solving task but some are not participating. What is the trainer's most effective action?**

- A) Join each breakout room periodically, provide guidance, and encourage equal participation**
- B) Close all breakout rooms and lecture instead
- C) Leave learners entirely to resolve it themselves
- D) Assign individual work instead of group work

**A trainer wants to monitor learner progress efficiently. Which AI tool is most appropriate?**

- A) Randomized grading without data
- B) Only paper-based observation
- C) Watching learners without recording or feedback
- D) AI-driven analytics dashboards that track performance**

**Which tool is most effective for remote collaboration on a business plan or start-up project?**

- A) Google Docs or Google Sheets**
- B) Printed worksheets

- C) Pre-recorded lecture videos only
- D) Personal notebooks with no sharing

**A trainer wants learners to submit and review each other's business ideas online. Which tool is MOST suitable?**

- A) Sharing PDFs without feedback
- B) Only sending emails to the trainer
- C) Padlet or LMS discussion forums**
- D) Watching a video demonstration

# Tool n°1: Case Study Comparison: Synchronous vs. Asynchronous Learning.

## AIM

Understand the strengths and limitations of synchronous (live) vs. asynchronous (self-paced) e-learning.

## LEARNING OUTCOMES

- Compare engagement and interaction in live vs. recorded sessions.
- Evaluate flexibility and accessibility for different learners.
- Identify which method suits specific training contexts.

## DURATION

40 minutes.

## MATERIALS

- Computer or laptop with internet access
- Zoom access for live lecture
- Access to a MOOC platform (Coursera, EdX, etc.)
- Pen and paper or digital note-taking tool

## METHODOLOGY

The methodology combines:

- **Experiential Learning:** Hands-on exercises where participants explore e learning methods and tools.
- **Collaborative Problem-Solving:** Team-based activities to discuss opportunities and limitations.
- **Guided Reflection & Feedback:** Trainer-led evaluation and discussion to identify strengths, gaps, and improvements.

## PROCESS

- Synchronous eLearning (10mins): Watch 10 minutes of a live Zoom lecture.
- Asynchronous eLearning (10mins): Watch 10 minutes of a recorded MOOC.
- Discuss in small groups (15mins): Engagement levels, Interaction opportunities, Flexibility and learner autonomy, Limitations and keep notes.
- Wrap-up (5 min) – Trainer summarizes lessons learned and best practices.

## TIPS FOR TRAINERS

- Encourage Collaboration: Ensure all participants actively contribute during group exercises.
- Guide, Don't Solve: Let teams make decisions.
- Prepare Materials in Advance: Test all digital tools, links, and resources before the session and have back up plans in case of technical issues (recorded videos, offline exercises).

## ASSESSMENT

- Learners will be assessed based on their ability to actively participate in the case study comparison and reflect critically on the differences between synchronous and asynchronous learning. The evaluation will focus on the depth and clarity of their observations during group discussions, their ability to identify strengths, limitations, and appropriate contexts for each e-learning method, and the quality of their reflections and notes. Trainers should look for

evidence that learners can justify their comparisons with examples from the observed sessions and demonstrate understanding of how these approaches can be applied effectively in vocational training contexts.

## REFERENCES

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## Tool n°2: Individual Debate Reflection: “Gamification is essential for effective e-learning”

### AIM

The aim is to encourage participants to critically analyse the role of gamification in e-learning by reflecting on both its benefits and limitations.

### LEARNING OUTCOMES

- Understand how gamification can enhance engagement, motivation, and learning outcomes.
- Recognize potential drawbacks or limitations, such as distraction, superficial learning, or overemphasis on rewards.
- Develop critical thinking skills by evaluating contrasting perspectives.
- Formulate a personal informed opinion on whether gamification is essential in modern e-learning environments.

### DURATION

30 minutes.

### MATERIALS

- Timer/clock
- Computer or laptop with internet access
- Pen and paper or digital note-taking tool

### METHODOLOGY

This exercise is based on experiential and reflective learning. By engaging in a structured debate reflection, participants actively explore the pedagogical value of gamification in e-learning. The activity encourages learners to analyse both the benefits and limitations of gamification, promoting critical thinking, self-awareness, and balanced judgment.

The exercise also draws from the principles of constructivist learning theory, where knowledge is built through active engagement and critical analysis. Reflection on pros and cons supports conceptual understanding and personal meaning-making, while the debate format fosters argumentation skills and evidence-based reasoning.

### PROCESS

- Individual reflection (10mins): Write down 3 pros and 3 cons, why gamification might be essential in e-learning and why gamification might not be necessary or could have drawbacks.
- Sharing phase (15mins): One by one, each participant shares one pro and one con from their notes.
- Wrap-up (5 min) – Trainer summarizes the shared ideas.

### TIPS FOR TRAINERS

- Manage the timing: Use a visible timer for the 10-minute writing phase so participants stay focused.
- Encourage diversity of ideas: If participants repeat points, ask: “Does anyone see it differently?”
- Balance the discussion: Ensure both pros and cons get equal attention.
- Wrap up effectively: Summarize the main arguments heard and highlight any patterns (e.g., most people see motivation as a pro, but distraction as a con).

## ASSESSMENT

- Trainer observes behaviours; peer feedback; vote to a anonymous quiz.

## REFERENCES

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## Tool n°3: Interactive Demo: Using Padlet for Adaptive Reflection in E-Learning

### AIM

To experience how digital tools like Padlet can enhance learner engagement, collaboration, and reflection, simulating adaptive learning pathways through interactive responses and feedback.

### LEARNING OUTCOMES

By the end of this activity, participants will be able to:

- Use **Padlet** to document and organize reflections on learning experiences.
- Collaborate and share insights with peers in a digital environment.
- Evaluate how interactive tools can **personalize engagement** and support reflective learning.

### DURATION

60 minutes.

### MATERIALS

- Computer or laptop with internet access
- Access to Padlet (<https://padlet.com>)
- Pen and paper or a digital note-taking tool

### METHODOLOGY

The methodology combines:

- Experiential Learning: Participants actively post reflections on Padlet.
- Collaborative Learning: Peer interaction fosters deeper insights and pattern recognition.
- Guided Reflection: Trainer facilitates discussion and highlights key findings.

### PROCESS

- Introduction (15mins): Trainer introduces Padlet.
- Individual Reflection & Posting (15 min): Watch 10 minutes of a recorded MOOC.
- Discuss in small groups (15mins): Engagement levels, Interaction opportunities, Flexibility and learner autonomy, Limitations and keep notes.
- Wrap-up (5 min) – Trainer summarizes lessons learned and best practices.

### TIPS FOR TRAINERS

- Encourage Collaboration: Ensure all participants actively contribute during group exercises.
- Guide, Don't Solve: Let teams make decisions.
- Prepare Materials in Advance: Test all digital tools, links, and resources before the session and have back up plans in case of technical issues (recorded videos, offline exercises).

### ASSESSMENT

Learners will be assessed based on their ability to actively participate in the case study comparison and reflect critically on the differences between synchronous and asynchronous learning. The evaluation will focus on the depth and clarity of their observations during group discussions, their ability to identify strengths, limitations, and appropriate contexts for each e-learning method, and the quality of their reflections and notes. Trainers should look for evidence that learners can justify their

comparisons with examples from the observed sessions and demonstrate understanding of how these approaches can be applied effectively in vocational training contexts.

## REFERENCES

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## Tool n°4: AI in Action – Build Your Own E-Learning Concept

### AIM

Trainers explore how AI can assist in creating or improving an e-learning experience on a topic of their choice (leadership skills, time management, customer service etc.).

### LEARNING OUTCOMES

By the end of this activity, participants will be able to:

- Identify opportunities to use AI tools in the design and delivery of e-learning experiences.
- Select appropriate AI tools to support specific training objectives, such as content creation, assessment, or learner engagement.
- Apply AI-generated outputs (text, visuals, or interactive elements) to enhance the quality and efficiency of e-learning materials.
- Evaluate the benefits, limitations, and ethical considerations of integrating AI into training and e-learning contexts.

### DURATION

75 minutes.

### MATERIALS

#### For the Facilitator:

- Projector or screen (for introducing the activity and showcasing AI tools)
- Computer with internet access
- Pre-prepared slide(s) with:
- Examples of AI tools (e.g., ChatGPT, Canva Magic Studio, DALL·E, Quizizz AI, Synthesia, Gemini, Copilot)
- Sample prompts or outputs (e.g., “Create 5 quiz questions on workplace safety”)
- Timer or stopwatch (to manage group timing)
- Whiteboard or flip chart with markers (for capturing ideas during debrief)

#### For Participants (per group or pair):

- Laptop, tablet, or smartphone with internet access
- Access to at least one AI tool (or facilitator-provided examples if offline)
- Group worksheet/template to record the topic, the AI tools used etc
- Paper and pens (for sketching ideas if technology is limited)
- Sticky notes (optional, for brainstorming)

### METHODOLOGY

The methodology combines:

- Experiential learning: participants explore and apply AI tools through hands-on creation of an e-learning concept.
- Collaborative learning: small group work encourages sharing ideas and co-designing solutions.
- Reflective practice: participants present their concepts and discuss the benefits, challenges, and ethical use of AI in training.
- Blended approach: integrates digital AI tools with discussion and group activities to support different learning styles.

## PROCESS

- Introduction (15mins): Trainer introduces the activity, objectives, and examples of AI tools. Participants form groups and select a topic.
- Group Work – AI Exploration & Design (35mins): Groups brainstorm how AI can support their chosen e-learning concept (content creation, visuals, assessment, personalization, etc.). They use or imagine using AI tools to prototype their idea. Trainer walk around and discuss with the groups.
- Lightning Demos, 5–7 minutes Rapid-Fire Sharing (20mins): Very short, focused presentation where each group shares the essence of their idea quickly.
- Wrap-up (5 min) – Trainer summarizes lessons learned and best practices.

## TIPS FOR TRAINERS

- Encourage Collaboration: Ensure all participants actively contribute during group exercises.
- Keep Groups Small: 3-4 participants per group ensures everyone can contribute.
- Demonstrate AI Tools Briefly: Show 1–2 quick examples of how AI can generate text, visuals, or quizzes to inspire participants.
- Facilitate, Don't Lead: Guide discussions, answer questions, and prompt reflection, but let participants explore AI themselves.
- Keep Energy High: Use Lightning Demos to maintain a dynamic pace and celebrate all contributions.
- Highlight Responsible AI Use: Remind participants that AI is a tool to enhance learning, not replace trainers or critical thinking.

## ASSESSMENT


Learners will be assessed on their ability to creatively apply AI tools to design or enhance an e-learning concept while managing their time effectively during the activity. Evaluation will focus on the originality and practicality of their ideas, efficient use of the allotted time for brainstorming and Lightning Demos, and their ability to collaborate and reflect on the benefits, challenges, and ethical considerations of using AI in training.

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Total Time:

**5** hours



# Learning Unit 12

## Designing high-quality digital contents and supports

# Learning Unit 12: Designing high-quality digital contents and supports

## Definition / What is this about?

Digital applications are important for content creation, facilitation, and assessment because they enhance collaboration, provide personalized and accessible learning experiences, and enable real-time feedback. These tools make it easier for learners and educators to create and share content, facilitate dynamic learning environments, and offer immediate and continuous feedback for better learning outcomes.

How to design clear and precise digital content, engage learners and gather feedback will be your main takeaway from this unit.

## Learning Objective / What can I learn?

By the end of this unit, trainers will be able to:

- Manage the appropriate integration of activities into a teaching program to maintain learner motivation.
- Supervise engaging activities into a learner skills assessment process;
- Monitor user experience with appropriate design techniques for pedagogical activities.

## Introduction / What is included?

This unit includes some of the experts' top evaluated digital applications for content design, for activity facilitation and assessment and insights on how to design clear and precise digital content.

## Theoretical approach

In this digital era there are applications for almost everything, including to teach or that can be used also in the teaching context. In the following chapter the trainer will find some of the most useful applications for content creation and for activity facilitation and assessment.

### 1. Content creation: principles and digital applications

Effective digital content creation aims to ensure that digital materials are engaging, clear, and achieve their purpose. When creating digital contents in educational settings, there are some key principles to follow. The trainer can use the table below as a comprehensive summary of the principles associated with tips for their implementation.

PRINCIPLE	HOW TO IMPLEMENT IT
<b>1. Learner-centred Design:</b> educational content should be designed around learners' needs, prior knowledge, and learning goals.	Use adaptive learning technologies to personalize content delivery. <b>Example:</b> Learning management systems (LMS)

	like Canvas or Moodle adapt quizzes and feedback based on student performance.
<b>2. Clarity and Cognitive Load Management:</b> content should be clear and structured to avoid overwhelming learners.	Use simple language, concise text, and chunked information. Limit extraneous visuals or text that may distract from learning.
<b>3. Multimedia Integration:</b> combining text, images, audio, and video enhance learning when applied effectively.	Use visuals to illustrate abstract ideas (e.g., animations in science lessons). Combine narration and graphics rather than text-heavy slides.
<b>4. Interactivity and Engagement:</b> learning improves when students actively interact with content rather than passively consume it	Incorporate quizzes, discussion boards, and simulations. Use gamified elements like badges and progress bars to sustain engagement.
<b>5. Accessibility and Inclusivity:</b> educational content must be accessible to all learners, including those with disabilities or limited access to technology.	Add captions, transcripts, and alt text for all media. Use inclusive language and provide multiple means of representation (aligned with Universal Design for Learning).
<b>6. Relevance and Real-World Application:</b> learners engage more when content connects with authentic, real-life contexts.	Use case studies, examples, and project-based learning tied to real-world problems. Encourage learners to apply concepts in practical assignments. <b>Example:</b> a business course uses real market data for learner analysis projects.
<b>7. Consistency and Structure:</b> consistent design and predictable navigation help learners focus on learning, not figuring out the interface.	Use consistent templates and navigation in LMS modules. Keep colour schemes, typography, and layout uniform. <b>Example:</b> each weekly module in a course follows the same structure: objectives → content → activities → assessment.
<b>8. Feedback and Assessment Integration:</b> learners need timely, constructive feedback to guide their progress.	Integrate automated feedback in quizzes and formative assessments and provide rubric-based evaluations for assignments. <b>Example:</b> online platforms like Google Classroom use instant quiz feedback to reinforce learning.
<b>9. Storytelling and Emotional Connection:</b> stories make educational content memorable and relatable.	Use narratives, case studies, or scenarios to illustrate concepts.
<b>10. Evaluation and Continuous Improvement:</b> digital educational content should be regularly reviewed and updated based on learner data and feedback.	Use analytics to track engagement and performance (e.g., completion rates, quiz scores). Update materials to align with new curriculum standards or technologies.

In the following paragraphs the trainer will find the most used applications for educational contents creations that can be used for design and graphics, for video and audio, for organisation and for image searching (images enhance the appeal of the contents and support the concepts).

### **For design and graphics: Canva**

Considered one of the best content creation apps by tons of content creators, Canva is a free-to-use online graphic design tool. The pro version in this case is very recommended to elevate the contents very much (you have a free 30-day trial to check it!). Trainers can use Canva to create presentations, graphics, infographics, posters, worksheets, visual support, video and much more. This application is very intuitive and provides free and editable templates for any contents a trainer wants to create. Additionally, it allows to download the material in different formats such as JPG, PNG, PDF, MP4 and more.

Explore [Canva](#).

### **For video and audio: CapCut, Loom and Audacity**

[CapCut](#) offers easy-to-use video editing functions. One of the most appreciated features of CapCut is auto captioning, especially if you are creating short form contents videos and the fact that you are able to share the video in multiple places (according to expert content creators, the captioning in this tool is also more appealing than other similar tools).

Link to [CupCut](#)

[Loom](#) is a video messaging tool that helps you get your message across through instantly shareable videos. With Loom, you can record your camera, microphone, and desktop screen simultaneously.

You can record your screen and also record a little add stile video of you talking at the same time. If you want to create an educational video for a digital course this tool is great for it. You can show how to do something where you can share your screen and walk someone through a process.

The main difference with Zoom is that Loom is designed for asynchronous video messaging, allowing users to capture their screen and share quick updates without needing to be live, while Zoom is focused on live video conferencing with features for real-time interaction.

Link to [Loom](#)

If you look for an audio editing application, [Audacity](#) comes to help. In addition to recording audio from multiple sources, Audacity can be used for post-processing of all types of audios, including effects such as normalization, trimming, and fading in and out. This free, open-source audio software is very intuitive.

Link to [Audacity](#)

### **For organization: Notion**

[Notion](#) is a great application for contents planning. Trainer can set yearly, monthly and quarterly goals, can keep contacts and daily To-Dos. It is basically a tool where to keep everything organised in one place. So, take notes, calendars, sheets and get them organised in there. Notion works very well also as a Project Management System so whenever there is something coming up such for example the launch new digital course and to keep track of every steps of the way you are at, see what is done and needs to be done etc. this can improve the productivity very much.

Trainers can use Notion app to organise training programs, manage learners' information, and create custom planning systems for a streamlined workflow. They leverage its flexible, database-driven features to build custom templates for lesson plans, schedules, grading, and even class websites, track progress, centralize course materials making it a versatile tool for administrative and training tasks.

Link to [Notion](#)

## **For images and assets: Pixabay, Freepik, Unsplash, Pexels**

Image copyright it's a very important aspect you have to consider whenever you are thinking to use images on your (digital) contents. The good news is that there are several websites that provide copyright free images. Good examples are Pixabay, Freepik, Unsplash and Pexels. Insert key words on the bar to find the image that best fit with the contents you are creating. Use the filter if you are looking for a specific format such as photo or illustration or vector images. In those websites there are also images for sale so if you don't want to see them, just use the filter and select "free images" and only those ones will appear on the screen.

## **2. Applications for activity facilitation**

Once the content has been created, the trainer can use various digital apps to deliver the teaching material to the learners. The most commonly used apps in education are those that encourage collaboration and engagement and allow feedback to be collected and shared. The following paragraphs describe some intuitive and easy-to-use apps for these purposes.

### **Collaboration and virtual whiteboards: Gamestorming, Miro and Liberating Structure**

Gamestorming it's a great tool to foster creativity, collaboration and innovation through engaging exercises or workshops activities.

For example, the "affinity mapping" it is a technique that can help you discover embedded patterns in your data (and sometimes break old patterns) of thinking by sorting and clustering language-based information into relationships. It can also give us a sense of where most people's thinking is focused. You can easily find this activity by writing "affinity map" on the search bar on the top left of the [Gamestorming website](#). For each "game" it is indicated the object of play, the number of players, the duration and a step-by-step implementation process.

Find out more at <https://gamestorming.com/>

Are you looking for a tool that has everything you need to run a workshop remotely? Sticky notes, pre-built template, voting dots, time timers...and you can even play music with participants to make the atmosphere nice. This tool name is Miro! One of the most useful feature is the Miroverse: if you go to the website and click on it (you have to sign in for free) you are brought to a page with loads of templates created by other users and you can use them immediately.

Find out more at <https://miro.com/>

If you are interested in facilitation techniques, you can check the Liberating Structure tool where you can find 33 of them that can be easily adapted to different workshops or educational settings.

In the [Liberating Structure website](#), if you click on the "LS Menu" you will find the 33 techniques and in each of them includes description and set-by-step guide on how to run the technique in your workshop or meeting. Moreover, it explains why to use that specific technique and some tips and examples.

Find out more at <https://www.liberatingstructures.com/>

## Engagement and feedback: Kahoot, Google form

Kahoot is a quiz based extremely engaging tool having a game host display questions on a shared screen, while participants use their own devices to answer multiple-choice questions within a time limit. The host generates a unique game PIN that players enter on a web browser or the Kahoot app to join the game. Points are awarded based on both correct answers and speed, with the highest score winning.

Find out more at <https://kahoot.com/>

During and at the end of a lesson or workshop it's always worthy to have some feedback from your audience. One of the easiest and simple tool is Google form. With Google Forms, you can create surveys or quizzes right on your mobile or web browser. No special software required. You get instant results as they come in. And you can summarize results at a glance with charts and graphs.

Last, but not least, it is very intuitive!

Get forms from [forms.google.com](https://forms.google.com)

### 3. Applications for activity assessment

Training assessment applications are **essential for effective monitoring of young entrepreneurs progress and training effectiveness**. They provide valuable insights into the skills and knowledge learners acquire. Moreover, by regularly assessing training outcomes, trainers can make informed decisions about future training programs.

**Choosing the right assessment tools is crucial for achieving effective training outcomes**. It is essential for the trainers to consider specific needs and objectives. Different tools excel at different aspects of monitoring and evaluation. Some may focus on quantitative data analysis, while others provide more qualitative insights.

In the following paragraphs, the trainer can find information about applications for formative and summative assessment (Edpuzzle and Socrative), self-assessment (Wayground) and peer assessment.

**Edpuzzle** it's an amazing interactive tool to **assess learners progress and understanding by using videos**. Edpuzzle's main features include creating interactive video lessons by adding questions, audio, and comments to online videos from sources like YouTube, TED, and National Geographic. Educators can also upload their own videos and use AI to automatically generate questions. Key features for teachers are the ability to track student progress, monitor their viewing habits, and automatically grade multiple-choice questions.

Check out this tutorial for trainers, teachers and educators [here](#) and the Edpuzzle website <https://edpuzzle.com/>

**Socrative** is an online assessment tool designed to enhance the learning experience by providing real-time feedback and allowing trainers to gauge learners understanding efficiently. It offers a variety of question types and formats to accommodate different training methods and learning styles. This versatile tool is used widely in classrooms for **both formative and summative assessments**, enabling trainers to create a dynamic and interactive learning environment.

Check out a teacher review [here](#) and the Socrative website <https://www.socrative.com/>

**Wayground** has self-assessment features that include a variety of question types, multiple ways to conduct assessments (live, homework, or self-paced), and detailed reports to track learners progress.

The learner can check his/her own progress and see the explanations of the answers. The trainer/teacher has to sign up to use the tool, while the learners will access the quizzes with with a code (no registration needed).

Check out the video tutorial for trainers [here](#) to create self-assessment quizzes or a step-by-step guide [here](#) and the Wayground website <https://wayground.com/>

A comprehensive summary of the benefits for trainers of each tool, the learning outcomes and the associated DigCompEdu area can be found in the **Annex 1**.

#### 4. Final remarks

As the European Commission states, the ubiquity of digital devices and applications requires educators to develop their digital competence. In today's learning environments, technology is not just a supplementary tool but a central medium for teaching, collaboration, and communication. Educators and trainers must therefore acquire the skills to effectively integrate digital tools into lesson planning, instruction, and assessment.

The **European Framework for the Digital Competence of Educators (DigCompEdu)** is a scientifically sound framework describing what it means for educators to be digitally competent.

<b>Area 2: Digital Resources</b>
<b>2.1 Selecting digital resources</b>
<b>2.2 Creating and modifying digital content</b>
<b>2.3 Managing, protecting and sharing digital resources</b>

Source: [DigCompEdu framework](#)

Developing digital competence also enables teachers to foster students' digital literacy, critical thinking, and responsible use of technology. Ultimately, cultivating these skills ensures that both educators and learners can navigate and thrive in an increasingly digital world.

### Practical action points / Can I have some tips?

- Select the tool(s) according to your needs;
- If this is something new for you, don't worry! Maybe it seems difficult when you start. Give it a chance, it won't disappoint you!
- These tools are perfect to vary your teaching method and get your learners engaged;
- Incorporate case studies, examples, interviews from local actors: this makes your learners feel more connected;
- Engage learners with practical activities, role plays, dynamic settings;
- Do not standardise your teaching method, act upon learners' characteristics/culture/experiences;
- Collect learners' feedback;

- Ensure participants receive constructive feedback based on assessment results to promote continuous improvement.

## Evaluating success /Let's evaluate what I learnt!

### Multiple-choice quiz

#### Question 1:

Which application is primarily recommended for graphic design and content creation?

- A) CapCut
- B) Canva
- C) Miro
- D) Audacity

**Answer:** B) Canva

#### Question 2:

What is the main difference between Loom and Zoom according to the text?

- A) Zoom allows screen recording, Loom does not
- B) Loom is designed for asynchronous video messaging, Zoom focuses on live video conferencing
- C) Zoom is only for educational use, Loom is for business
- D) Loom has built-in auto-captioning, Zoom does not

**Answer:** B) Loom is designed for asynchronous video messaging, Zoom focuses on live video conferencing

#### Question 3:

Which tool is suggested for organizing content, goals, and project management in one place?

- Notion
- Miro
- Kahoot
- Edpuzzle

**Answer:** A) Notion

#### Question 4:

Which of the following tools allows educators to assess learners' understanding through interactive video lessons?

- A) Google Forms
- B) Kahoot
- C) Edpuzzle
- D) CapCut

**Answer:** C) Edpuzzle

**Question 5:**

**Which tool is described as a virtual whiteboard with pre-built templates, voting dots, and timers, ideal for remote workshops?**

- A) Gamestorming
- B) Miro
- C) Liberating Structures
- D) Canva

**Answer:** B) Miro

**Question 6:**

**What is the main purpose of Kahoot in teaching and learning?**

- A) To design graphics and visual content
- B) To assess learners' progress through interactive quizzes and games
- C) To organize projects and daily tasks
- D) To record audio for lessons

**Answer:** B) To assess learners' progress through interactive quizzes and games

**Question 7:**

**Which of the following tools provides 33 techniques for facilitation that can be adapted to workshops or educational settings?**

- A) Miro
- B) Liberating Structures
- C) Gamestorming
- D) Notion

**Answer:** B) Liberating Structures

**Question 8:**

**Affinity mapping, a technique for discovering patterns in data and sorting information into clusters, is associated with which tool?**

- A) Gamestorming
- B) Kahoot
- C) Canva
- D) Edpuzzle

**Answer:** A) Gamestorming

## Reflection

- What tools can I use to teach with a student-centred approach?
- Am I exploring well the tool(s) I chose to fully use their features?
- How can I gather feedback in a constructive manner for both the students and myself?

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# Tool n°1: Idea Storm: Collaborative Concept Mapping with Miro

## AIM

To engage learners in an interactive brainstorming session using Miro, fostering collaboration, critical thinking, and creativity through visual mapping and group participation.

## LEARNING OUTCOMES

By the end of this activity, participants will be able to:

- Collaborate effectively using Miro’s interactive whiteboard tools;
- Organize and visualize ideas in a shared digital space;
- Connect concepts and identify relationships between ideas;
- Communicate and contribute actively to a group brainstorming session;
- Reflect on how visual collaboration enhances learning and teamwork.

## DURATION

45-60 minutes.

## MATERIALS

- Trainer’s Miro account
- Shared Miro board (set to “Anyone with the link can edit”)
- Laptops or tablets with internet access for students
- Projector or shared screen (for demonstration)
- Topic or question for brainstorming (trainer’s choice — examples below)

### Example topics:

- “How can we make learning more engaging?”
- “Innovative ways to use technology in education.”
- “Sustainable solutions for our school/community.”
- “What skills will be most important for future careers?”

## METHODOLOGY

This activity is designed for trainers specifically for engaging learners using Miro.

This activity helps trainers facilitate interactive, visual, and collaborative learning that keeps learners actively involved, whether online or in the classroom.

## PROCESS

### 1. Introduction & Setup (10 minutes)

Trainer Actions:

1. Introduce Miro as a digital collaboration tool for brainstorming, organizing ideas, and teamwork.
2. Show students how to navigate:
  - Move around the board
  - Add sticky notes
  - Change colours and fonts
  - Use connectors and shapes

3. Share the board link with students.
4. Explain the topic and learning objective of the session.

**Learner****Task:**

Join the shared board, explore tools briefly, and add one sticky note with their name or favourite colour to test interaction.

**2. Brainstorming (15 minutes)**

Trainer Actions:

1. Introduce the main question (e.g., *“What makes a great learning experience?”*).
2. Demonstrate adding ideas using sticky notes.
3. Divide students into small groups or pairs. Assign each group a section or frame of the board.
4. Set a timer (10 minutes) on Miro to keep the activity focused.
5. Encourage free thinking — “No wrong ideas!”

**Learner****Task:**

Add sticky notes with their ideas (one idea per note). They can also use emojis, arrows, and images to make their section visual.

**3. Grouping & Connecting Ideas (15 minutes)**

Trainer Actions:

1. Guide students to read each other’s sticky notes.
2. Demonstrate how to drag and group related ideas together.
3. Ask groups to label clusters with themes or categories. (e.g., “Technology,” “Engagement,” “Motivation,” “Creativity”)
4. Show how to use arrows or connectors to link related themes.

**Learner****Task:**

Work together to organize their section, identify themes, and visually link ideas.

**4. Sharing & Discussion (10–15 minutes)**

Trainer Actions:

1. Use presentation mode in Miro to review each group’s section.
2. Ask:
  - “What common ideas appeared across groups?”
  - “Which themes seem most important?”
  - “How did working visually help you collaborate?”
3. Summarize key findings directly on the board (e.g., highlight top three ideas).

**Learner**  
 Each group briefly presents their ideas (1–2 minutes).  
 They can highlight their favourite sticky notes or themes.

**Task:**

### 5.Reflection (5 minutes)

Trainer Actions:

- Add a new section on the Miro board titled “Reflections.”
- Ask students to post one sticky note answering:
  - “What did I learn today?”
  - “How did Miro help me share my ideas?”
- Summarise reflections and highlight collaboration successes.

For follow-up (Optional):

- Export the Miro board as a PDF and share it with the class.
- Ask students to build on the ideas in a written reflection or presentation.
- In future sessions, use Miro again for project planning, storyboarding, or concept mapping.

### TIPS FOR TRAINERS

- Use bright colours and visuals to make the board inviting;
- Encourage quieter students to add digital sticky notes rather than speak up (this increases inclusion);
- Use Miro’s timer, voting, or commenting tools to keep activities structured;
- Save and reuse the same board template for future lessons

### ASSESSMENT

Evaluation by following this summary table.

Criteria	Description	Method
<b>Participation</b>	Student engagement during brainstorming and discussion	Trainer observation
<b>Collaboration</b>	Ability to work and communicate effectively on the Miro board	Group output
<b>Creativity</b>	Variety and originality of ideas shared	Review of Miro board
<b>Reflection</b>	Understanding of Miro’s usefulness and learning takeaways	Sticky note reflection section

## Tool n°2: What, So What, Now What? W<sup>3</sup>

### AIM

To facilitate structured reflection and discussion, enabling learners to analyse experiences, derive insights, and plan actionable steps for future learning or application.

### LEARNING OUTCOMES

By the end of this activity, participants will be able to:

- Enhance critical thinking and reflective skills;
- Promote collaborative learning and idea sharing;
- Encourage actionable planning for continuous improvement.

### DURATION

25-30 minutes.

### MATERIALS

- Paper and pens for each participant
- Flip charts or whiteboards (optional)
- Markers

### METHODOLOGY

This is a Liberating Structures activity designed for trainers to carry out with learners, fostering engagement, reflection, and collaborative learning. This is an example extracted from the tool mentioned in the chapter above and it serves to guide trainer in the implementation of the other activities included in the same tool.

### PROCESS

#### 1. Introduction (3 minutes):

- Briefly explain the purpose of the activity: to reflect on a recent experience, extract meaningful insights, and determine actionable steps.
- Present the three guiding questions:
  - **What?** – What happened? What did you observe or experience?
  - **So What?** – Why is this significant? What patterns or insights emerged?
  - **Now What?** – What actions or changes are needed moving forward?

#### 2. Individual Reflection (5 minutes):

- Ask each participant to spend a few minutes reflecting on the experience or topic at hand, jotting down their responses to the three questions on paper.

#### 3. Small Group Discussion (10 minutes):

- Divide participants into small groups of 5–7.
- Instruct each group to share their reflections, discussing the "What" and "So What" questions.
- Encourage active listening and ensure each participant has an opportunity to contribute.

#### 4. Whole Group Sharing (5–7 minutes):

- Reconvene as a whole group.
- Invite each small group to share key insights from their discussions, focusing on the "Now What" question, actions or changes they plan to implement based on their reflections.

#### 5. Conclusion (2–3 minutes):

- Summarize the key takeaways from the activity.
- Encourage participants to commit to at least one action based on their reflections

### TIPS FOR TRAINERS

- Set the tone by emphasizing that there are no “wrong” observations or interpretations, focus is on honest reflection;
- Keep each stage concise; use a timer if needed to ensure all steps are completed;
- Model active listening and encourage participants to do the same, ensuring everyone’s voice is heard;
- Guide the discussion but avoid giving answers; let participants generate insights themselves;
- Use flip charts, Miro, or whiteboards to visualize key insights and proposed actions;
- Ask participants to note one actionable step they will take, reinforcing accountability

### ASSESSMENT

Group Debrief Observation: trainer observes each small group discussion, noting:

- Participation level
- Critical thinking and analysis
- Ability to connect experiences to actionable insights

This assessment provides a real-time assessment of engagement and understanding.

### REFERENCES

Keith McCandless, Henri Lipmanowicz. Liberating Structures. Link to the tool [here](#)

### ANNEX 1

Tool	Benefits for Trainers	Learning Outcomes	DigCompEdu Areas
Canva	Easy creation of engaging visuals and learning materials. Saves time through templates and collaboration features. Enhances presentation and instructional design quality.	Develop visual communication and design thinking. Strengthen creativity and digital content creation skills. Learn to present information clearly.	2. Digital Resources 5. Empowering Learners
CapCut	Enables production of short, engaging educational videos. Supports flipped classroom and microlearning strategies. Allows	Build media literacy and storytelling skills. Gain confidence in digital content creation. Enhance	2. Digital Resources

	trainers to demonstrate editing or storytelling.	communication through video expression.	5. Empowering Learners
<b>Loom</b>	Allows trainers to give quick video feedback or mini lectures. Facilitates asynchronous teaching and flipped learning. Personalizes instruction through visual/audio presence.	Learn through self-paced video explanations. Improve retention by revisiting content anytime. Strengthen self-regulated learning and reflection.	2. Digital Resources 3. Teaching and Learning
<b>Audacity</b>	Create podcasts or audio resources for flexible learning. Supports listening and pronunciation activities. Enables voice-based assessments or reflections.	Develop listening and speaking skills. Gain experience with audio editing and storytelling. Enhance digital literacy and communication.	2. Digital Resources 5. Empowering Learners
<b>Notion</b>	Centralizes notes, course plans, resources, and communication. Encourages transparent tracking of learning progress. Facilitates collaborative project management.	Improve organization and collaboration skills. Learn project planning and documentation. Foster responsibility and autonomy.	1. Professional Engagement 3. Teaching and Learning 5. Empowering Learners
<b>Gamestorming</b>	Provides structured methods to design creative, interactive workshops. Encourages participation and idea generation. Supports innovation and problem-solving in learning sessions.	Enhance creativity and collaboration. Learn ideation and problem-solving techniques. Build teamwork and engagement.	3. Teaching and Learning 5. Empowering Learners
<b>Miro</b>	Supports interactive, visual collaboration and brainstorming. Ideal for hybrid or remote teamwork. Allows trainers to visualize concepts dynamically.	Develop collaboration and digital whiteboarding skills. Learn to organize and present ideas visually. Increase engagement through participation.	1. Professional Engagement 3. Teaching and Learning 5. Empowering Learners
<b>Liberating Structures</b>	Provides structured facilitation methods to engage all learners. Increases inclusion and ownership of learning. Encourages reflective and participatory teaching practices.	Develop communication, critical thinking, and leadership. Gain confidence in contributing ideas. Experience inclusive, participatory learning.	3. Teaching and Learning 5. Empowering Learners
<b>Kahoot</b>	Makes assessment fun and interactive. Provides instant feedback and insights on learner progress. Encourages active participation and motivation.	Reinforce knowledge through play. Develop quick recall and decision-making. Experience healthy competition and collaboration.	4. Assessment 5. Empowering Learners

<b>Google Forms</b>	Simplifies collection of data, feedback, and quiz results. Automates grading and analytics. Supports formative and summative assessment.	Practice self-assessment and reflection. Learn to provide structured feedback. Improve digital communication through forms.	4. Assessment 2. Digital Resources
<b>Edpuzzle</b>	Transforms passive videos into active learning experiences. Enables tracking of learner progress within videos. Supports flipped and self-paced learning models.	Strengthen comprehension and autonomy. Develop critical viewing and digital learning strategies. Engage actively with content instead of consuming passively.	3. Teaching and Learning 4. Assessment 5. Empowering Learners
<b>Socrative</b>	Enables quick formative and summative assessments. Provides real-time analytics of learner understanding. Encourages interactive questioning and discussion.	Develop critical thinking through instant feedback. Improve knowledge recall and application. Engage actively in assessment processes.	4. Assessment 3. Teaching and Learning
<b>Wayground</b>	Creates gamified quizzes and polls for engagement. Provides automatic grading and analytics. Supports self-paced or live learning modes.	Reinforce understanding through gamified repetition. Build motivation and learner autonomy. Develop digital assessment and collaboration skills.	4. Assessment 5. Empowering Learners

Total Time:

**5** hours

# Learning Unit 13

## The Basic principles of assessment

# Learning Unit 13 The Basic principles of assessment

## Definition / What is this about

This unit introduces the fundamental principles of assessment, guiding VET trainers through key assessment methods and processes while enabling them to translate theoretical understanding into practical skills. It covers everything from assessing prior learning to delivering focused, constructive feedback to learners. The unit is organised into three main sections, aligned with the assessment dimension of DigCompEdu - ensuring consistency with relevant European frameworks and tools. These sections include: Assessment Strategies, Analysing Evidence, and Feedback and Planning.

## Learning Objective / What can I learn?

### Assessment Strategies

By the end of this section, trainers will be able to distinguish between formative and summative assessment and understand their purposes in VET contexts. They will design and implement assessment tools that respect key principles such as validity, reliability, and fairness. Trainers will also be able to identify the EntreComp framework as a reference for assessing entrepreneurial ideas and competences and introduce it to learners as a tool for self-assessment, enabling students to evaluate their own skills and knowledge.

### Analysing Evidence

In this part of the unit, trainers will recognise the importance of prior learning as a starting point for development and understand the role of knowledge, skills, responsibility, and autonomy as defined in the European Qualifications Framework (EQF) for assessing learning outcomes. They will explore different perspectives on assessment, including self-assessment, peer assessment, and teacher-led assessment, and learn how to evaluate the effectiveness of assessment methods to make informed adjustments that improve learning outcomes.

### Feedback and Planning

By the conclusion of this section, trainers will be able to provide constructive, targeted feedback to VET learners in a supportive and professional manner. They will use assessment results to adapt teaching strategies and establish effective feedback cycles for continuous learning. Additionally, trainers will foster learner autonomy by helping students reflect on their progress, take responsibility for their own learning, and apply assessment practices that promote motivation, engagement, and confidence.

### Introduction / What is included?

This unit introduces the basic principles of assessment in vocational education and training (VET), guiding trainers through three key areas with the aim of explaining the purpose, principles, and methods of effective assessment; identifying and interpreting learners' competences; and emphasising meaningful feedback and continuous improvement.

Each section connects theory with practice and aligns with European frameworks and instruments. The unit also lays the foundation for assessing young entrepreneurs engaged in cross-border projects, preparing trainers to evaluate innovative, real-world learning outcomes with fairness and consistency.

## Contextualization / Why do I need to invest my time on this?

For VET trainers, mastering assessment principles is vital to ensure quality learning, equitable evaluation, and learner development. This learning unit supports trainers in understanding how to measure competences accurately, recognise prior learning, and provide constructive feedback—skills that are especially valuable when working with young entrepreneurs in international or cross-border settings. Investing time in these concepts enables trainers to design assessments that respect cultural diversity, promote entrepreneurial mindsets, and align with European standards. By doing so, trainers not only enhance learners' employability and self-efficacy but also contribute to the credibility and transparency of transnational VET programmes.

## Theoretical approach

### Assessment Strategies

Assessing learning outcomes is a fundamental part of vocational education and training, as it allows trainers to understand what learners have acquired and to make informed decisions about their progress. Assessment serves multiple purposes: it can be **summative**, offering a final evaluation such as a grade or qualification at the end of a learning period, or **formative**, supporting ongoing learning by identifying gaps in knowledge, skills, or understanding and guiding teaching accordingly.

Common tools for summative assessment include multiple-choice tests or quiz applications like Kahoot, while formative assessment may be conducted through group presentations, reflective essays, practical tasks, or workplace simulations. Increasingly, digital tools are being integrated to provide timely feedback and track learner progress, enhancing both engagement and accuracy. Learning management systems, e-portfolios, and mobile assessment apps can enhance both formative and summative assessment, providing immediate feedback, tracking progress, and supporting evidence collection.

### Core principles of assessment include validity, reliability and fairness:

In VET, an assessment is valid when it accurately evaluates the professional knowledge, skills, and attitudes it is intended to measure. Validity focuses on whether the evidence collected reflects learners' competence in real or simulated workplace situations, and whether the resulting decisions—such as certification, qualification, or progression—are well-founded and defensible.

Reliability relates to the consistency and dependability of assessment outcomes. In vocational contexts, learners demonstrating the same level of competence should receive similar results, regardless of the assessor or the assessment context. Clear criteria, carefully designed tasks, and adequate assessor training are essential to ensure reliability in both classroom and workplace-based assessments.

Objective assessment gives all learners an equal opportunity to demonstrate their abilities. In VET, this means avoiding unnecessary barriers—such as overly complex language, inaccessible tools or equipment, or assessor bias—and focusing solely on the skills and knowledge relevant to the occupation. Fair assessment supports inclusion and respects the diversity of learning pathways across Europe.

### Standards, comparability and practicality are also relevant for assessment in VET:

Standards define what successful performance looks like at different levels of achievement. In European VET, these standards are often aligned with frameworks such as the **European Qualifications Framework (EQF)** or the **EntreComp framework**, ensuring a shared understanding among learners,

educators, and employers of what constitutes competence in practice. Comparability refers to the degree to which outcomes from different assessments can be considered equivalent. In VET, this ensures that qualifications or grades represent the same level of competence, regardless of the learning route, institution, or assessment format. Maintaining comparability enhances transparency, mobility, and trust in qualifications across EU countries. Assessments must be realistic, feasible, and sustainable. Trainers often work within time, resource, and workplace constraints. Effective assessment design balances validity and reliability with practicality, ensuring that tasks remain achievable, authentic, and meaningful for learners while being manageable for educators.

In vocational education and training, several additional considerations help ensure that assessments are meaningful, practical, and relevant. Tasks should be designed to reflect real workplace practices, allowing learners to demonstrate their skills in contexts similar to those they will encounter in their future professions. Assessments can also be linked to apprenticeships, internships, or other work-based learning experiences, recognising prior knowledge and practical experience. Furthermore, aligning assessments with European frameworks such as the European Qualifications Framework (EQF) and EntreComp supports learner mobility, mutual recognition of qualifications, and the professional development of both learners and educators across Europe.

### **Analysing Evidence**

Analysing evidence is a crucial step in vocational education and training, as it allows trainers to understand learners' current competence and to make informed decisions for future development. This process can be divided into two complementary areas: the analysis of prior learning and the analysis of ongoing learning in VET contexts.

### **Analysing Evidence of Prior Learning**

According to Cedefop, there are four phases of validation of learning: Identification, documentation, assessment and certification. The validation of prior learning itself supports continuing professional training and is a tool for promotion and career development. The European Qualifications Framework (EQF) distinguishes three core dimensions: Knowledge, which refers to theoretical and/or factual understanding; Skills, which encompass cognitive (logical, intuitive, and creative thinking) and practical abilities (involving manual dexterity and use of methods, materials, tools, and instruments); and Responsibility and Autonomy, which describes the learner's ability to apply knowledge and skills independently and with accountability. Understanding what learners already know and can do provides a foundation for effective teaching and learning. Prior learning can include formal qualifications, work experience, informal training, or skills gained in everyday contexts. Analysing this evidence enables trainers to tailor instruction to learners' needs, recognise existing competences, and identify gaps that require development. Evidence of prior learning can be collected e.g. through interviews, portfolios, practical demonstrations, or structured questionnaires.

### **Analysing Evidence of Learning in VET**

Once prior knowledge has been established, trainers focus on analysing learning as it develops. In VET contexts, evidence of learning can come from practical tasks, projects, workplace simulations, presentations, and reflective exercises. Assessing this evidence requires consideration of the learner's technical skills, applied knowledge, problem-solving abilities, and professional behaviours.

#### **Three perspectives are central to analysing learning evidence in VET:**

**Self-Assessment:** Learners reflect on their own performance and identify their strengths and areas for improvement. Self-assessment promotes autonomy, critical thinking, and metacognitive skills, enabling learners to take ownership of their learning (Boud, 1995).

Peer Assessment: Learners evaluate each other's work using agreed criteria. Peer assessment fosters collaboration, critical reflection, and communication skills, while also offering multiple perspectives on competence and performance (Topping, 2009).

Teacher-Led Assessment: The VET-trainer systematically evaluates learners' performance against established standards, providing expert judgement and guidance. Teacher-led assessment ensures consistency, fairness, and alignment with learning outcomes and qualification frameworks.

Combining these approaches allows for a triangulated view of competence, providing a richer understanding of learner progress and supporting well-informed teaching decisions. Analysing evidence in this way also underpins effective feedback, personalised support, and planning for further development, ensuring that learning outcomes are both meaningful and achievable within authentic work-related contexts.

## Feedback and Planning

Providing timely, constructive, and targeted feedback is a key component of VET. Feedback bridges the gap between assessment and learning, enabling learners to understand their current level of competence and how to improve. Effective feedback not only supports skill development but also fosters motivation, self-reflection, and confidence in learners.

Based on the concepts of Hattie and Timperley, the feedback is relevant on four levels:

- Task (Is it correct?)
- Process (Was it a good approach? Was it successful and fast or with deviations?)
- self-regulation (business as usual or a creative solution? motivation?)
- self (well done)

Feedback in VET should be specific, actionable, and aligned with established standards, such as the European Qualifications Framework (EQF) and the EntreComp framework. By linking feedback to clearly defined learning outcomes, trainers ensure that learners receive guidance that is meaningful, relevant, and applicable to real work contexts. Some EntreComp competence descriptors explicitly reference assessment and feedback, e.g. learning through experience.

Analysing assessment evidence allows VET trainers to identify patterns in learner performance and to adapt their teaching strategies accordingly. This may involve providing additional practice in specific areas, offering targeted support for weaker skills, or designing new learning activities that build on learners' strengths. Planning also requires consideration of workplace constraints, available resources, and the sequence of learning tasks to ensure that development opportunities are realistic and achievable.

In VET, feedback and planning should consider multiple perspectives: self-assessment, peer assessment (e.g. involve colleagues at the workplace), and teacher-led assessment (e.g. instructors). Encouraging learners to reflect on their own performance promotes autonomy and self-regulation, while peer feedback supports collaborative learning and critical reflection. Teacher-led feedback provides expert guidance, helping VET learners understand where they meet or fall short of professional standards. Learners benefit most when they receive regular, timely guidance that is integrated into their learning process. By establishing feedback cycles, trainers can monitor progress, adjust learning pathways, and ensure that each learner has the opportunity to achieve their full potential in both classroom and workplace contexts.

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## Practical action points / Can I have some tips?

### Assessment Strategies

It is essential to define the purpose of the assessment clearly, whether it is to evaluate knowledge, applied skills, entrepreneurial behaviours, or a combination of these. VET-Trainers should align assessment criteria with recognised European frameworks, such as the European Qualifications Framework (EQF) and EntreComp, to ensure consistency and comparability across countries. Summative assessments, such as final project presentations or business proposals, provide an overall evaluation of learning, while formative assessments, including drafts, reflective exercises, or team-based activities, support ongoing learning and skill development. Explicitly communicating standards and expected outcomes helps learners understand what constitutes competent entrepreneurial practice in both local and international contexts.

### Analysing Evidence

VET-Trainers should collect a variety of evidence reflecting the learner's competences, such as project plans, prototypes, presentations, reflective journals, and documentation of cross-border collaboration. This analysis should consider both the breadth and depth of learning, including technical knowledge, applied skills, problem-solving, creativity, and professional behaviours. A holistic view can be achieved by integrating multiple assessment perspectives:

- self-assessment encourages learners to reflect on their progress and take ownership of their development;
- peer assessment highlights teamwork, communication, and intercultural collaboration; and
- A teacher-led assessment ensures expert judgement, consistency, and alignment with established standards.

Prior learning and experience should also be recognised, allowing trainers to tailor tasks to build on existing competences while challenging learners to develop new skills in cross-border contexts.

## Feedback and Planning

VET-Trainers should provide feedback that is specific, actionable, and timely, linking it directly to learning outcomes and addressing multiple levels, including task, process, self-regulation, and self, as outlined by Hattie and Timperley (2007). Assessment evidence should inform the adaptation of teaching strategies, guiding additional practice where needed and planning activities that strengthen weaker skills. Establishing continuous feedback cycles enables learners to reflect on their progress, receive guidance, and iteratively refine their entrepreneurial initiatives. It is also important to encourage reflection on cross-border experiences, helping learners identify lessons learned, appreciate cultural differences, and consider how to apply their knowledge and skills in diverse international contexts.

## Evaluating success /Let's evaluate what I learnt!

### SINGLE CHOICE – 10 Questions

#### Part 1 – Assessment Strategies (4 Questions)

**Q1. In vocational education, an assessment is considered valid when:**

- A) It is easy to complete for all learners
- B) It consistently produces the same score every time
- C) It accurately measures the knowledge, skills, and competences it is intended to assess**
- D) It uses the same format as previous tests

**Q2. Which of the following best describes formative assessment?**

- A) It provides a final grade at the end of a learning period
- B) It identifies gaps in learning and guides ongoing instruction**
- C) It is only used for written tests
- D) It focuses on comparing learners to each other

**Q3. Why is fairness a key principle in VET assessment?**

- A) It ensures all learners achieve the highest grade
- B) It guarantees all learners complete the same tasks
- C) It avoids bias and provides equal opportunity for learners to demonstrate competence**
- D) It allows learners to choose which tasks they prefer

**Q4. Aligning assessment with European frameworks, such as EQF or EntreComp, primarily ensures:**

- A) Assessments are easier to pass
- B) Consistency, comparability, and transparency across countries**
- C) Learners focus only on theoretical knowledge

D) Trainers have less work preparing assessments

### **Part 2 – Analysing Evidence (3 Questions)**

**Q5. Which of the following is NOT a typical source of evidence for assessing learning in VET?**

A) Reflective journals

B) Project prototypes

**C) Learner’s personal hobbies unrelated to learning**

D) Workplace simulations

**Q6. Combining self-assessment, peer assessment, and teacher-led assessment is recommended because:**

A) It saves time for the trainer

**B) It provides a holistic, triangulated view of learner competence**

C) It focuses only on academic knowledge

D) It replaces the need for formal grading

**Q7. Analysing prior learning in VET helps trainers to:**

A) Avoid giving any new challenges

**B) Recognise existing competences and identify gaps for development**

C) Assign the same tasks to all learners

D) Focus solely on final exams

### **Part 3 – Feedback and Planning (3 Questions)**

**Q8. Effective feedback in VET should be:**

A) General and motivational

**B) Specific, actionable, timely, and linked to learning outcomes**

C) Only provided at the end of the course

D) Focused exclusively on grades

**Q9. Feedback following Hattie and Timperley’s model addresses four levels. Which of the following is NOT one of these levels?**

A) Task

B) Process

C) Self-regulation

## D) Peer popularity

**Q10. Planning after assessment is important because it allows trainers to:**

- A) Repeat the same lessons regardless of learner progress
- B) Adjust teaching strategies, provide targeted support, and establish feedback cycles**
- C) Focus only on learners who are underperforming
- D) Avoid reflection on cross-border collaboration

## Reflection

To consolidate your learning, take a moment to reflect on the following questions:

1. How can you ensure that your assessment of entrepreneurial projects fairly recognises diverse cultural approaches, prior experiences, and learning pathways across different countries?
2. When evaluating cross-border entrepreneurial initiatives, what challenges might arise in balancing standardised European frameworks with the specific context and innovation of the learner's project?
3. How can feedback and assessment be used not only to evaluate performance but also to encourage creativity, autonomy, and collaboration among young entrepreneurs working in international teams?

## Tool n°1: From Ideas to Impact: Assessing Transnational Entrepreneurial Learning in Practice

### AIM

To enable VET trainers to apply the basic principles of assessment—validity, reliability, fairness, and practicality—by designing both formative and summative assessment instruments for young entrepreneurs working on cross-border projects within Europe. Trainers will practise analysing evidence of learning and developing fair, consistent, and authentic assessments for diverse vocational and cultural contexts.

### LEARNING OUTCOMES

By the end of this activity, participants will be able to:

- Identify the most suitable assessment methods for evaluating entrepreneurial competences in VET contexts.
- Design valid, reliable, and fair formative and summative assessment tools for transnational projects.
- Apply the principles of analysing evidence of learning, including self-, peer-, and teacher-led assessment.
- Recognise how cultural and contextual factors influence the fairness and comparability of assessment results.
- Reflect on how assessment outcomes can inform feedback, planning, and further learner development.

### DURATION

90 minutes (30 minutes for case familiarisation, 40 minutes for assessment design, 20 minutes for reflection).

### MATERIALS

- Printed case study profiles of the three cases with six personas (see below)
- Assessment design template (formative and summative tool examples)
- EntreComp and EQF descriptors relevant to entrepreneurship and learning outcomes (see references below)

### METHODOLOGY

Reflective activity combining case analysis and guided reflection. VET-Trainers work individually to analyse the case studies, reflect on possible learning evidence, and design suitable assessment instruments for formative (ongoing) and summative (final) evaluation.

Optional: To be done in pair or group work.

### PROCESS

#### 1. Case Familiarisation (30 minutes)

VET-Trainers read the following six learner personas, each representing a young entrepreneur involved in a cross-border project. Each pair of learners collaborates on a joint initiative combining different entrepreneurial and vocational skills.

### **Case A – France & Germany**

Camille (FR): 24, graduate in sustainable design, developing eco-friendly packaging from recycled materials.

Jonas (DE): 25, mechanical technician specialising in automated production systems.

Together, they are creating a green start-up that designs and produces biodegradable packaging using locally sourced waste materials.

### **Case B – Ireland & Greece**

Aoife (IE): 23, hospitality management student passionate about local food and tourism.

Nikos (EL): 26, young farmer producing organic olive oil and traditional Greek products.

Their joint project is a culinary exchange start-up, connecting sustainable farms in Greece with Irish restaurants and tourism networks through an online marketplace and experiential travel packages.

### **Case C – Cyprus & Spain**

Elena (CY): 22, IT student with an interest in digital entrepreneurship and community development.

Luis (ES): 25, marketing graduate focusing on youth engagement and creative industries.

They collaborate on a social enterprise supporting young people in rural areas to develop digital marketing skills and promote local cultural products online.

## **Step 2: Designing Assessment Tools (40 min)**

Each VET-trainer selects one cross-border project and:

- Defines potential learning outcomes based on EQF levels and EntreComp competences (e.g. creativity, mobilising resources, taking initiative, ethical and sustainable thinking).
- Designs a **formative assessment tool**, such as a self-assessment checklist, peer observation guide, or reflective log, to monitor progress during the project.
- Designs a **summative assessment tool**, such as a rubric or evaluation grid, to assess final project outcomes and entrepreneurial competences.

Ensures both tools are valid (aligned with learning goals), reliable (clear, replicable criteria), and fair (inclusive and culturally sensitive).

Optional: In group work, the groups may select different cross-border projects

## **Step 3: Reflection (20 min)**

Reflect on the assessment tools and justify the design choices.

Check:

- How validity, reliability, and fairness were ensured.
- What evidence of learning would be collected.
- How assessment outcomes could inform feedback and planning for future learning.

Optional: In group work, a discussion could bring up other views and ideas.

### TIPS FOR TRAINERS

- Encourage participants to think beyond academic achievement and focus on real-world entrepreneurial competences such as collaboration, problem-solving, creativity, and adaptability.
- Remind them to consider the authenticity of evidence—projects should mirror real workplace or business challenges.
- Highlight cultural sensitivity and communication differences when working with cross-border teams.
- Recommend that trainers may draw on EntreComp descriptors to ensure coherence between assessment criteria and key entrepreneurial competences.

### INTERACTIVE LEARNING SEGMENT:

How is your work proceeding? Use this formative assessment tool to assess your work after 45 minutes

#### Formative Assessment Tool:

**Example:** Self-evaluation

**Purpose:** To monitor learner progress, decision-making, and teamwork during project development.

Criteria	Indicators of Progress	Name ..... ... Level (L–M–H)
Initiative	Identifies next steps, takes responsibility for actions	
Collaboration	Communicates clearly, negotiates decisions	
Creativity	Suggests new ideas or solutions	

Optional: In case of pair or group work, the participants may compare their perceptions or use the template for peer assessment

### ASSESSMENT

Trainers' participation and outputs can be assessed through:

- Quality and completeness of designed tools (valid, reliable, fair, practical).
- Ability to align assessment with stated learning outcomes.
- Reflection on how assessment supports learner growth, feedback, and planning.

Optional: Peer review among trainer groups can reinforce learning through feedback

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## Tool n°2: From Setback to Success: Analysing a Failing Cross-Border Entrepreneurship Project

### AIM

To help VET trainers practise analysing evidence from a struggling learner project and design a targeted improvement process that supports both formative feedback and learner self-regulation.

### LEARNING OUTCOMES

By the end of this activity, participants will be able to:

- Identify common challenges in assessing performance in transnational entrepreneurial projects.
- Apply the principles of formative assessment and feedback for learning to guide learner improvement.
- Develop an action plan for learner progress based on valid, fair, and practical assessment evidence.

### DURATION

Approximatively 90 minutes

### MATERIALS

- Printed or digital copies of the scenario and learner evidence (case summary, excerpts of reflections, evaluation notes).
- Markers or pens

### METHODOLOGY

Interactive case-based learning using a problem-solving and reflective approach. VET-Trainers analyse evidence, derive findings, design an improvement strategy, and reflect on how to implement supportive feedback in similar real-life contexts. The approach models authentic, learner-centred assessment practice.

### PROCESS

As a VET-Trainer – you are mentoring two young entrepreneurs whose cross-border project is struggling:

#### **Case “ReUse Fashion” (France–Cyprus Partnership)**

Léa (FR): A 22-year-old fashion student passionate about sustainable textiles.

Andreas (CY): A 25-year-old business graduate aiming to build a social enterprise in upcycled clothing.

Their project — ReUse Fashion — planned to create an online marketplace connecting Mediterranean designers who reuse discarded fabrics.

However, six months in, the project is faltering:

- Communication between partners has broken down due to different working cultures and expectations of the partners.
- The prototype website is delayed.
- Market analysis and budgeting were incomplete.

The learners show frustration, blame external factors, and have stopped reflecting regularly.

As a VET trainer, you receive the following evidence:

Case “ReUse Fashion” (France–Cyprus Partnership)

- Incomplete business plan (missing cost analysis and sustainability plan).
- Short reflection from Léa: “I feel stuck. We have ideas but can’t get them to work. Maybe we don’t fit as partners.”
- Peer observation notes from Andreas’ mentor: “Andreas focuses too much on design and neglects market testing.”
- Previous formative assessment records showing moderate performance in teamwork and planning.

### **Activity Steps**

#### **Step 1 – Analyse the Evidence (20 min)**

VET-Trainers review the scenario and available evidence and identify:

- What are the key learning gaps (skills, knowledge, attitudes).
- Which parts of the evidence are valid and reliable indicators of performance.
- What additional information or evidence might be needed.

#### **Step 2 – Design an Improvement Plan (40 min)**

Each participant drafts a learner improvement process, including:

- Short-term formative goals for both learners.
- Feedback strategies (task-, process-, and self-regulation-levels, following Hattie & Timperley).
- Peer or self-assessment tools that could motivate renewed engagement.
- Actions to ensure fairness and support intercultural communication

#### **Step 3 –Reflect (20 min)**

Reflect on relevant elements:

- How assessment supports improvement rather than judgement.
- How to balance empathy and accountability in formative assessment.
- How this process prepares learners for success in future cross-border projects.

Optional: Share your plan with other VET trainers and discuss.

#### **Step 4 – Debrief (10 min)**

Summarise how analysing assessment evidence (as in Tool No. 1) leads to targeted learner support and how constructive feedback loops sustain motivation and professional growth.

- Encourage trainers to separate evidence of learning from personal impressions.
- Remind them that improvement processes must be learner-owned: the trainer facilitates reflection but does not impose solutions.
- Use open-ended feedback questions (“What worked? What would you change next time?”).
- Highlight cultural sensitivity — communication issues are often caused by different expectations, not incompetence.
- Keep the improvement plan simple, time-bound, and measurable.

**INTERACTIVE LEARNING SEGMENT:**

Reflection: Match the five concepts and descriptions

Concepts	Descriptions
1 Validation of Prior Learning	A. Learners evaluate their own progress, identifying strengths and weaknesses to take ownership of their learning.
2 Self-Assessment	B. Trainers assess performance using established criteria and frameworks, ensuring fairness, validity, and consistency.
3 Peer Assessment	C. The structured process of identifying, documenting, assessing, and certifying competences already acquired through formal, non-formal, or informal learning.
4 Teacher-Led Assessment	D. Combining multiple perspectives and sources of evidence (e.g., self-, peer-, and teacher-assessment) to achieve a more reliable and holistic view of competence.
5 Triangulation of Evidence	E. Learners provide constructive feedback on each other’s work using agreed criteria, encouraging collaboration, reflection, and communication.

1 C, 2 A, 3 E, 4 B, 5 D

**ASSESSMENT**

VET-Trainers are evaluated through their ability to:

- Accurately diagnose learning needs using provided evidence.
- Create valid, fair, and practical improvement strategies.
- Articulate how their plan supports learner autonomy and competence growth.
- Peer feedback during presentations strengthens the learning process.

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**ENTREPRENEURSHIP  
WITHOUT BORDERS**

Total Time:

**5** hours

# Learning Unit 14

Designing skills  
assessment tools  
incorporating the  
digital dimension

# Learning Unit 14: Designing skills assessment tools incorporating the digital dimension

## Definition / What is this about?

This unit shows VET trainers how to design assessment tools that deliberately include digital elements to improve the quality, accessibility and relevance of skills assessment. It also demonstrates how digital approaches can diversify assessment formats, support formative practice, document learning evidence, and help align outcomes with European frameworks (e.g. EQF, EntreComp). Investing time here prepares VET trainers to use digital affordances for valid, reliable, and fair assessment in transnational entrepreneurial projects. One of the six competence areas in the DigCompEdu is Assessment. Ensuring consistency with this relevant European framework for teachers and trainers in all fields of education, the contents include: Assessment Strategies, Analysing Evidence, and Feedback and Planning.

## Learning Objective / What can I learn?

### Assessment Strategies

Based on the knowledge, skills and competences gained in the previous unit, by the end of this section, trainers will be able to explain how digital options can enrich formative and summative assessment in VET. They will be able to develop formative and summative assessment tools that make targeted use of the possibilities offered by digital technology while preserving validity, reliability and fairness.

### Analysing Evidence

VET Trainers will be able to analyse digital evidence of prior learning in line with the European Qualifications Framework (EQF). With view to analysing continuing learning efforts, the VET Trainers will be able to include different perspectives on digital assessment, including self-assessment, peer assessment, and teacher-led assessment. They will be able to select and apply appropriate digital tools, taking into account accessibility, privacy, compatibility for cross-border learning activities, such as the Europass.

### Feedback and Planning

For this section, the VET trainers will be able to plan and implement feedback cycles that use digital records in order to personalise follow-up learning, track progress and support learner reflection.

## Introduction / What is included?

This unit examines how digital dimensions can be specifically integrated into assessment tools for vocational education and training – not as a gimmick, but as well-considered pedagogical decisions that strengthen evidence, feedback and learners' ability to act. The unit covers: (a) Assessment Strategies — selecting digital formats suited to assess in particular entrepreneurial competences; (b) Analysing Evidence — using digital tool for analysing both prior and continuous learning; and (c) Feedback & Planning — using digital records and tools to support learner development and mobility.

## Contextualization / Why do I need to invest my time on this?

According to the OECD Report (Forsström, S. et al.), artificial intelligence and learning analytics tools are successful processes in teacher support:

*“Augments teaching by handling routine tasks, freeing educators to focus on more complex instructional responsibilities and direct student support.*

*Combining digital assessments with analogue tools (e.g. scratch paper) is an effective strategy for managing cognitive load.”*

Why shouldn't you, as a trainer, benefit from these modern tools?

Digital assessment can make learning visible across borders, accelerate timely feedback, and create transferable evidence that promotes recognition and employability. For VET trainers of young entrepreneurs who operate transnationally, digital artefacts (e.g. recorded presentations, joint project logs, e-portfolios) enable them to assess evidence – even if they are not located in the same country. However, digital assessment also requires careful planning: technology alone does not guarantee validity, fairness or improved learning outcomes – sound formative practice and the judgement of assessors remain indispensable. The unit shows how both can be combined.

## Theoretical approach

### Assessment Strategies

Assessment strategies determine what to assess, how learners will demonstrate competence and which digital affordances are pedagogically appropriate. In the digital era, strategy design begins with mapping the target competences (e.g. EntreComp, EQF) to authentic tasks that learners can perform and document online. DigCompEdu encourages educators to view technology as a means to diversify formats and provide more equitable access — but stresses that digital choices must serve pedagogical aims rather than the reverse. At the same time, literature on formative assessment emphasises that clarity of purpose and criteria drives learning gains regardless of medium. Policy reviews likewise warn trainers to anticipate issues of equity, privacy and governance when embedding digital elements. The digital infrastructure for the use of tools in learning contexts continues to vary greatly across EU countries.

When developing assessment strategies with digital tools, it may be a good idea to firstly consider the seven principles of good assessment and feedback developed by Jisc, the coordinating organisation for the use of digital technology and data in the UK tertiary education sector:

- Help learners understand what good looks like
- Support the personalised needs of learners
- Foster active learning
- Develop autonomous learners
- Manage staff and learner workload effectively
- Foster a motivated learning community
- Promote learner employability

When planning digital assessment strategies, the use of learning management systems should also be considered. Not only do they offer the possibility of creating content for learners, they also support other

areas such as the management of attendance and absences, grades and the measurement of learning engagement.

Last but not least, a modern assessment strategy will include AI-related tools and instruments.

At the strategy stage, the VET Trainer decides task types and evidence needed; the following basic tools and types may help structure those choices and support comparability and practicality in digitally-mediated settings.

Key digital tools:

1. Structured online forms and quizzes (Google Forms, Microsoft Forms, Kahoot, LMS quizzes like H5P with a variety of question types from Multiple choice or Matching to more complex open question types)

Strengths	Limitations
<ul style="list-style-type: none"> <li>• quick to design;</li> <li>• excellent for knowledge checks and short diagnostic items;</li> <li>• automatic data collection and export for analysis,</li> <li>• quizzes with competitive elements encourage learner motivation and among learners in the working group</li> </ul>	<ul style="list-style-type: none"> <li>• poor fit for complex, authentic entrepreneurial tasks;</li> <li>• automated scoring cannot capture nuance of problem-solving or creativity</li> <li>• Multiple choice and similar question types can produce correct answers from learners - when just guessing an item</li> </ul>

2. Collaborative project documents (Google Docs, shared documents, shared spreadsheets)

Strengths	Limitations
<ul style="list-style-type: none"> <li>• record process evidence (who did what, when);</li> <li>• support distributed, cross-border teamwork and allow trainers to observe workflow</li> </ul>	<ul style="list-style-type: none"> <li>• confusing versions without clear protocols;</li> <li>• without additional evidence, there may be no indication of individual contributions.</li> </ul>

## Analysing Evidence

The analysis initially involves the use of digital tools for assessment by teachers, regardless of whether the evidence submitted was analogue or digital. It is essential to check whether the results submitted by learners meet the competence requirements.

In the digital age, trainers are not only assessors but also data interpreters, ensuring that evidence is authentic, traceable, and aligned with expected learning outcomes such as those of the EQF or EntreComp. While digitisation expands the types of evidence that can be assessed, it also requires a more critical approach to verifying authorship and the creation process - ensuring that evidence is authentic, traceable, and aligned with expected learning outcomes such as those of the EQF or EntreComp.

An authentic assessment in the field of entrepreneurship should not only include the final product, but also how learners think, make decisions and cooperate. It is interesting that the Competence of “Ethical & Sustainable Thinking” in the area of “Ideas & Opportunities” in the EntreComp Practical Guide is

underpinned with the hint “Assess the consequences and impact of ideas, opportunities and actions” and its descriptor “Assess the consequences of ideas that bring value and the effect of entrepreneurial action on the target community, the market, society and the environment. Reflect on how sustainable long-term social, cultural and economic goals are, and the course of action chosen. Act responsibly”.

Evidence analysis in digital environments therefore requires a multiple approach—cross-referencing artefacts, process traces, and reflections — to establish validity and reliability. For instance, when assessing a transnational entrepreneurship project, a trainer might compare the learner’s reflective journal entries with the timestamps and edit history of their collaborative documents, and with evidence from a recorded online meeting.

DigCompEdu’s “Assessment” area underlines the need for teachers to use digital tools critically, understanding both their affordances and risks, especially as artificial intelligence reshapes the evidence landscape.

Key digital tools:

**1. E-Portfolios (e.g. Google Sites, Moodle or structured digital folders linked to the Europass)**

Strengths	Limitations
<ul style="list-style-type: none"> <li>● collect multimodal artefacts, self-reflections, and process documentation;</li> <li>● provide a coherent structure for linking outputs to learning outcomes and EQF descriptors</li> </ul>	<ul style="list-style-type: none"> <li>● require digital literacy and consistent monitoring;</li> <li>● moderation across more assessors can be time-consuming.</li> </ul>

**2. Video artefact repositories (e.g., recorded project pitches or demonstrations)**

Strengths	Limitations
<ul style="list-style-type: none"> <li>● provide vivid, authentic evidence of applied competences such as communication, innovation, and teamwork;</li> <li>● valuable for remote and cross-border projects.</li> </ul>	<ul style="list-style-type: none"> <li>● video editing may conceal process weaknesses;</li> <li>● requires storage space and consent management.</li> </ul>

**3. Process logs and collaboration histories (metadata from platforms such as Google Workspace, Microsoft 365, or Trello)**

Strengths	Limitations
<ul style="list-style-type: none"> <li>● show chronological evidence of contribution and problem-solving;</li> <li>● promote transparency in group work and entrepreneurship tasks.</li> </ul>	<ul style="list-style-type: none"> <li>● interpretation requires contextual knowledge;</li> <li>● some learners may underrepresent their contribution digitally.</li> </ul>

**4. Europass environment**

Strengths	Limitations
<ul style="list-style-type: none"> <li>• summarise validated competences and enhance transparency across borders;</li> <li>• link learning outcomes to European frameworks</li> </ul>	<ul style="list-style-type: none"> <li>• record only verified achievements, not the raw artefacts or creative process behind them.</li> </ul>

AI tools supporting trainers in evidence analysis: AI can also be an ally in managing the growing volume and complexity of assessment evidence. There are several European projects, e.g. AI pioneers (<https://aipioneers.org/knowledge-base/>), collecting AI tools and best practice for teachers. Some established tools and their main purpose include:

- assist in summarising large bodies of learner evidence and suggesting insights: Eduaide.ai, BaseHumata, TextLayer
- highlight criteria alignment and suggest feedback phrasing: EssayGrader

Strengths	Limitations
<ul style="list-style-type: none"> <li>• These tools save time, enhance reliability through pattern recognition, and support consistent formative feedback</li> </ul>	<ul style="list-style-type: none"> <li>• The tools rely on quality input data;</li> <li>• AI analytics may overlook contextual nuances or introduce bias.</li> <li>• Trainers must maintain professional oversight and comply with GDPR when processing learner data.</li> </ul>

### Strategies for detecting AI-supported or plagiarised evidence

As AI-generated content becomes increasingly sophisticated, trainers must develop a digital literacy for authenticity verification. The European Commission (2024) and UNESCO (2023) both recommend combining technological, pedagogical, and ethical strategies rather than relying solely on automated detection.

Key strategies include:

- Comparing submitted artefacts with process data (draft histories, timestamps, collaboration traces) to verify continuity of learner engagement.
- Short reflective interviews or oral verification help determine if learners truly understand and can justify their artefacts.
- Applications such as Turnitin Originality, GPTZero, and Crossplag identify potential AI-generated or copied content by analysing linguistic patterns and metadata, however, these tools should inform—not replace—human judgement.
- Pedagogical approach with reflection logs, and iterative feedback exchanges reduce incentives and opportunities for plagiarism or AI misuse.

### 3. Feedback and Planning

Feedback and planning are integral to the assessment loop: trainers use analysed evidence to deliver actionable feedback and to plan further learning. Extensive research supports the provision of frequent, targeted feedback that focuses on task, process and self-regulation. The use of technology can make feedback timelier and richer (e.g. annotated artefacts, recorded feedback), but pedagogical clarity remains decisive. Platforms that facilitate threaded comments, versioned revisions and tracked responses enable learners to generate and act on feedback between iterations.

Best practice in digital assessment emphasises a blended feedback loop where automated tools provide immediate, objective insights, and human feedback adds interpretive depth, context, and personalised guidance. For example, a learning management system (LMS) might automatically flag errors or provide a quiz score, while the trainer adds commentary on reasoning, creativity, or ethical considerations in the learner’s entrepreneurial project. The combination ensures timely feedback, encourages reflection, and maintains validity, reliability, and fairness.

#### Key digital tools:

##### 1. Annotation and commenting tools (PDF/Google Docs comment, LMS annotation)

Strengths	Limitations
<ul style="list-style-type: none"> <li>allow targeted, contextual comments on documents;</li> <li>support dialogue between trainer and learner;</li> <li>keep feedback linked to specific evidence</li> </ul>	<ul style="list-style-type: none"> <li>can be ignored without explicit follow-up;</li> <li>The volume of comments may overwhelm learners.</li> </ul>

##### 2. Peer-review platforms (e.g. LMS)

Strengths	Limitations
<ul style="list-style-type: none"> <li>structure peer feedback;</li> <li>promote critical reflection and meta-cognition;</li> <li>scalable for larger learning groups.</li> </ul>	<ul style="list-style-type: none"> <li>quality of peer feedback is variable;</li> <li>It needs to be reviewed and examples provided.</li> </ul>

##### 3. Small-scale learning analytics & progress dashboards (spreadsheet trackers, LMS progress tools)

Strengths	Limitations
<ul style="list-style-type: none"> <li>Provide at-a-glance progress indicators;</li> <li>helpful for planning interventions and monitoring feedback cycles.</li> </ul>	<ul style="list-style-type: none"> <li>Risk of over-reliance on quantitative indicators;</li> <li>analytics must be interpreted carefully to avoid false conclusions.</li> </ul>

##### 4. Recorded feedback (audio/video coaching clips)

Strengths	Limitations
<ul style="list-style-type: none"> <li>• Personal, nuanced and often more engaging than written comments;</li> <li>• useful when explaining complex process-level guidance.</li> </ul>	<ul style="list-style-type: none"> <li>• time-consuming to produce at scale;</li> <li>• storage and consent considerations apply.</li> </ul>

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Effective digital assessment in VET requires trainers to design valid, reliable, and inclusive tools that integrate technology purposefully across all three stages of assessment: Assessment Strategies, Analysing Evidence and Feedback & Planning. By aligning digital strategies with clear learning objectives, trainers can enhance the quality of evidence collection, promote learner autonomy, and deliver meaningful feedback that supports competence development in cross-border entrepreneurial contexts.

## Practical action points / Can I have some tips?

Designing and implementing digital assessment tools requires both technical competence and pedagogical clarity. VET trainers should begin by identifying which competences they aim to assess and why a digital approach enhances learning validity or inclusivity. Mapping these competences to frameworks such as the European Qualifications Framework (EQF) or the EntreComp Framework helps ensure that assessments focus on knowledge, skills, responsibility and autonomy relevant to entrepreneurial performance. Digital tools are most effective when they serve a defined assessment purpose—formative or summative—and when they help visualise complex competences such as creativity, collaboration, and problem-solving in authentic contexts.

In relation to assessment strategies, trainers should seek to diversify assessment formats using digital media that reflect the dynamic nature of entrepreneurship. Tools such as Google Forms or Kahoot can be used for quick, low-stakes formative quizzes, enabling learners to receive immediate feedback and reducing performance anxiety. For summative assessment, Learning Management Systems such as Moodle provide structured environments for e.g. compiling presentations or recorded project pitches. These digital collections enhance validity by enabling trainers to evaluate both process and product while supporting mobility and comparability across transnational learning settings. Trainers should also

ensure that tasks remain inclusive by considering linguistic accessibility, digital literacy, and equal opportunities for learners with varying technological resources.

When analysing evidence, trainers must be able to interpret digital resources and their associated data critically. Reviewing timestamps and edit histories can provide valuable information about learner engagement, teamwork, and authenticity of the work. Trainers can also use AI-supported systems to help identify unoriginal content or facilitate analysis processes.

For feedback and planning, digital tools offer new opportunities to maintain learner engagement through continuous dialogue rather than onetime grading. It is important, however, that automated feedback is supplemented with personalised guidance that focuses on strategy, self-regulation, and motivation.

Finally, integrating the digital dimension into assessment should also include attention to digital ethics, privacy, and professional responsibility. Trainers should model ethical digital behaviour by declaring the use of AI tools, citing digital sources correctly, and ensuring compliance with data protection standards such as the General Data Protection Regulation (GDPR). Embedding these practices prepares young entrepreneurs not only for successful assessment but also for ethical participation in a digital and interconnected European labour market. Investing time in developing these digital assessment competences strengthens the credibility, transparency, and authenticity of VET practice and aligns with the DigCompEdu framework's Area 4: Assessment.

## Evaluating success /Let's evaluate what I learnt!

### SINGLE CHOICE – 10 Questions

**1. Which DigCompEdu competence area is most directly related to the focus of this unit?**

- A. Digital Resources
- B. Assessment**
- C. Professional Engagement
- D. Empowering Learners

**2. What is the main purpose of including digital tools in assessment?**

- A. To make assessments appear more modern
- B. To replace traditional assessment completely
- C. To enhance validity, accessibility, and feedback**
- D. To reduce trainers' workload only

**3. Which of the following tools best supports formative assessment?**

- A. Google Forms quizzes**
- B. Europass CV builder
- C. Turnitin Originality
- D. Recorded feedback videos

**4. In designing a digital assessment strategy, what should trainers prioritise first?**

A. Choosing the most advanced technology

**B. Mapping competences to learning outcomes**

C. Ensuring all assessments are gamified

D. Minimising feedback loops

**5. What key advantage does a collaborative document such as Google Docs offer?**

A. They guarantee data privacy

B. They provide automatic grading

**C. They record process evidence and teamwork**

D. They prevent plagiarism completely

**6. Which of the following is an ethical requirement when using digital assessment tools?**

A. Sharing all learner data publicly to ensure transparency

**B. Complying with GDPR and obtaining informed consent for data use**

C. Using AI tools without notifying learners

D. Allowing platforms to store data indefinitely

**7. According to European Commission guidelines, what should trainers do when AI tools are used in evidence creation?**

A. Automatically reject AI-generated work

**B. Combine technological, pedagogical, and ethical strategies**

C. Ignore AI use if the result is good

D. Use only detection software

**8. What is one limitation of using recorded video feedback?**

A. It is too formal

B. It is difficult for learners to understand

**C. It can be time-consuming and requires consent management**

D. It cannot convey emotions

**9. What is a good way to detect potential AI-generated content?**

A. Rely entirely on automated detection tools

**B. Compare process data and conduct oral verification**

C. Assume all polished work is AI-generated

D. Check formatting inconsistencies only

**10. Why is ethical digital behaviour important in assessment?**

A. It ensures trainers use the most popular platforms

**B. It maintains fairness, privacy, and transparency**

C. It helps learners pass more easily

D. It reduces the need for feedback

## Reflection

To consolidate your learning, take a moment to reflect on the following questions:

- How can digital assessment tools promote fairness and transparency in evaluating cross-border entrepreneurial projects — and where do potential risks remain?
- In what ways might AI support or challenge your professional judgement when analysing learners' digital evidence?
- Reflect on your own teaching context: how can you balance efficiency through digital tools with the human dimension of feedback and mentorship?

# Tool n°1: Designing Digital Assessment for Transnational Entrepreneurial Learning

## AIM

To enable VET trainers to apply the EntreComp framework in designing valid, reliable, and fair digital assessment tools for entrepreneurial learning in cross-border contexts.

## LEARNING OUTCOMES

By the end of this activity, participants will be able to:

- Identify key entrepreneurial competences to assess in a specific learning context.
- Translate EntreComp competences into measurable learning outcomes.
- Develop formative and summative digital assessment instruments tailored to entrepreneurial projects.

## DURATION

90–120 minutes (self-paced, online).

## MATERIALS

- EntreComp Practical Guide (2020)
- Digital tools (e.g., Moodle, Google Forms, H5P)
- Case study description and personas (provided below)
- Template for assessment tool design (PDF or online form)

## METHODOLOGY

Individual online learning, combining reading, reflection, digital tool exercises and a case-based approach to encourage application of theory to practice.

Optional: To be done in pair or group work.

## PROCESS

### Step 1: Case Familiarisation

VET-Trainers read the following six learner personas, each representing a young entrepreneur involved in a cross-border project.

- **Case A – France & Greece – “Smart Mobility App for Cities”**

Élodie (FR, 24)

**Background:** Urban planning graduate, experience in transport sustainability projects.

**Skills:** Data analysis, design thinking, project management.

**Motivation:** Improve urban mobility and reduce traffic congestion.

Alexandros (EL, 27)

**Background:** Computer science graduate with experience in mobile app development.

**Skills:** Software development, UX/UI, agile project management.

**Motivation:** Make cities more accessible through smart digital solutions.

**Project Focus:** Develop a mobile application that connects citizens with sustainable transport options (bike-sharing, e-scooters, public transport schedules) and provides gamified incentives for eco-friendly commuting.

- **Case B – Germany & Cyprus – “Online Peer Mentoring for STEM Students”**

Lena (DE, 23)

**Background:** Engineering student, volunteer as STEM tutor for high-school students.

**Skills:** Mentoring, digital content creation, collaboration.

**Motivation:** Encourage more girls to pursue STEM careers.

**Christos (CY, 26)**

**Background:** Education sciences graduate, trained in online teaching methodologies.

**Skills:** Pedagogy, curriculum design, learning analytics.

**Motivation:** Improve student engagement and performance in STEM subjects.

**Project Focus:** Create a cross-border online peer mentoring platform connecting secondary school students with STEM students, offering digital tutorials, webinars, and mentoring sessions.

- **Case C – Ireland & Spain – “Youth Cultural Exchange Podcast”**

Saoirse (IE, 25)

**Background:** Media and communications graduate, experienced in podcast production.

**Skills:** Storytelling, audio editing, social media promotion.

**Motivation:** Promote cultural awareness and creativity among young people.

**Background:** Arts and cultural management graduate, experience coordinating youth projects.

**Skills:** Event management, project coordination, cross-cultural communication.

**Motivation:** Support young people in sharing their cultural heritage internationally.

**Project Focus:** Launch a bilingual cross-border podcast showcasing youth culture, entrepreneurship, and creative projects from Ireland and Spain, with episodes produced collaboratively and published online

Martín (ES, 24)

**Background:** Arts and cultural management graduate, experience coordinating youth projects.

**Skills:** Event management, project coordination, cross-cultural communication.

**Motivation:** Support young people in sharing their cultural heritage internationally.

**Project Focus:** Launch a bilingual cross-border podcast showcasing youth culture, entrepreneurship, and creative projects from Ireland and Spain, with episodes produced collaboratively and published online.

## Step 2: Mapping Competences

Using the EntreComp framework, identify which entrepreneurial competences are most relevant for each project (e.g., creativity, ethical & sustainable thinking, financial literacy).

## Step 3: Translate into Learning Outcomes

Develop concrete, measurable learning outcomes for each persona/project.

## Step 4: Design Assessment Tools:

- For formative assessment, select digital tools such as quizzes, shared documents, or reflection logs to monitor ongoing progress.
- For summative assessment, propose methods to assess both process and product (e.g., digital portfolios, recorded presentations, project reports).

**Step 5: Evaluate Assessment Instruments:** Reflect on the designed tools in terms of validity, reliability, fairness, accessibility, and cross-border applicability, including AI-supported checking options. Check for data privacy / GDPR issues, particularly regarding recordings or collaborative documents.

## TIPS FOR TRAINERS

- Ensure that assessment tasks are authentic and linked to real entrepreneurial actions.
- Consider linguistic, technological, and cultural differences in cross-border projects.
- Use simple, widely accessible digital tools for formative assessment to maximise engagement.
- Review and refine assessment instruments iteratively, combining automated feedback with teacher judgement.

## INTERACTIVE LEARNING SEGMENT:

### Checking Your Learning on Digital Assessment

**Question 1: You want to assess a learner's ability to reflect on the sustainability impact of their entrepreneurial idea. Which question is most appropriate?**

- A) "List three reasons why your project is sustainable."
- B) "Do you think your project is good for the environment?"
- C) "Explain how your project reduces environmental impact and what trade-offs you had to consider."

**Correct answer: C**

Why? Open-ended, encourages reflection and critical thinking. Options A is partially valid but less analytical; B is vague and yes/no style.

**Question 2: Which assessment question is poorly aligned with the intended competence "collaborative problem-solving in a cross-border team"?**

- A) "Describe a situation where you resolved a conflict in your team, including the steps you took and the outcome."
- B) "Rate on a scale of 1–5 how well your team worked together."

C) “Provide an example of a challenge your team faced and how you contributed to solving it.”

**Correct answer: B**

Why? Quantitative rating alone doesn’t provide actionable evidence of actual collaborative skills; A and C elicit descriptive, assessable evidence.

**Question 3: You want to create a formative digital quiz for entrepreneurial competences. Which question demonstrates poor assessment design?**

A) “Which of the following is an example of a value proposition?”

B) “Match the entrepreneurial activity to its relevant competence area in EntreComp.”

C) “Explain how your team applied creativity to overcome a project challenge.”

**Correct answer: A**

Why? Simple multiple-choice may be appropriate for factual recall but does not assess applied competences. B and C encourage analytical or applied learning evidence.

Optional Extension:

VET Trainers can try rewriting the weak questions to improve validity, reliability, and alignment with EntreComp competences.

## ASSESSMENT

Trainers’ participation and outputs can be assessed through:

- Completion of the online template mapping competences to learning outcomes.
- Submission of proposed formative and summative digital assessment instruments with justification linked to EntreComp and EQF.
- Reflection log entry evaluating the appropriateness and fairness of the designed tools.

Optional: Peer review among trainer groups can reinforce learning through feedback.

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## Tool n°2: Learning from Poor Digital Assessment Practice

### AIM

To enable VET trainers to critically reflect on digital assessment practice by analysing a case study of a VET trainer who poorly implemented digital tools, identify faults, and propose strategies for improvement.

### LEARNING OUTCOMES

By the end of this activity, participants will be able to:

- Identify weaknesses in digital assessment planning, implementation, and feedback.
- Recognise the impact of poor digital assessment on learner engagement and competence development.
- Propose evidence-informed corrective strategies to improve assessment quality, validity, and fairness.
- Develop reflective practice skills applicable to their own digital assessment activities.

### DURATION

90–120 minutes (self-paced, online), optionally with group discussion.

### MATERIALS

- Case study description with examples of the trainer's performance
- EntreComp Practical Guide (2020)
- Digital assessment tools (Google Forms, LMS platforms, collaborative docs)
- Reflection template for analysis and improvement plan

### METHODOLOGY

Scenario-based reflection and problem-solving. Trainers work individually or in pairs to analyse faults and propose corrective strategies.

### PROCESS

#### STEP 1: Case Study Familiarisation

As an experienced VET-Trainer and mentor, you are analysing the realistic evidence of weak digital assessment and feedback practices of VET Trainer Markus (DE, 35).

You will use this material to identify faults, understand consequences for learner progress, and prepare corrective strategies. These are the documents:

#### 1. LMS Activity Logs (Simulated Screenshot)

LEARNER	TASK SUBMISSION	DATE	QUIZ SCORE	COMMENTS VIEWED TIME
Anna (CY)	03/10/2025	5/10	No	12 min
Lukas (DE)	04/10/2025	6/10	No	8 min
Maria (CY)	05/10/2025	7/10	No	10 min
Theo (DE)	06/10/2025	8/10	No	6 min

## 2. Digital Feedback Comments

Submission: Group project document on “Online Peer Mentoring Platform”

### Markus’ Comments:

- “Good job.”
- “I like it, keep it up.”
- “Not bad.”
- “Make sure you submit on time next time.”

## 3. Google Docs Collaboration History

### Document Title: STEM Mentoring Plan

Edit	User	Timestamp	Change Description
1	Student A	01/10/2025 09:15	Added introduction text
2	Student B	01/10/2025 09:16	Added some bullet points (not clear which section)
3	Student A	01/10/2025 09:20	Deleted last line (no comment)
4	Student C	01/10/2025 09:30	Rewrote paragraphs (not tracked in comments)
	5	Markus	02/10/2025 10:00 Comment: “Looks okay”

## 4. Sample Assessment Questions

### Quiz: Entrepreneurship Competences

- “Entrepreneurship is important. True or False?”
- “Select the main skill of a good entrepreneur: a) Singing b) Communication c) Eating”
- “Rate your team’s creativity from 1–5.”
- “Which of the following is an ethical action? a) Help customers b) Ignore rules c) Be nice”

### STEP 2: Analysing the evidences

What do you notice? What is the key issue? What is the consequence? Take a short time to analyse and reflect before going on.

Here are some clues:

### 1. LMS Activity Logs

Analysis:

- Learners spent minimal time on the platform and did not access feedback.
- Scores are clustered closely, suggesting low differentiation and a lack of deeper competence testing.

What is the key issue?

- Markus used the LMS only for recording grades, not for promoting formative engagement with the comments.
- What is the consequence?
- Learners missed opportunities for reflection and improvement; feedback was not integrated into the learning cycle.

### **Reflection**

What actions could Markus take to encourage learners to view and act on feedback in future modules?

## **2. Digital Feedback Comments**

Analysis:

- Comments such as “Good job” or “Not bad” provide no indication of strengths, weaknesses, or next steps.
- What is the key issue?
- Feedback lacks specificity and constructive focus; no reference to criteria, EntreComp competences, or evidence of learning.
- What is the consequence?
- Learners receive no direction on how to improve, which reduces motivation and learning transfer.

### **Reflection**

Which principles of good assessment and feedback did Markus fail to apply here?

- e.g., help learners understand what good looks like,
- support personalised needs,
- develop autonomous learners

## **3. Google Docs Collaboration History**

Analysis

- Minimal comments,
- unclear version control, and lack of traceability.
- Trainer involvement is minimal (“Looks okay”).

What is the key issue?

- Markus did not use the tool’s affordances (e.g., comment tagging, version comparison, task allocation).

What is the consequence?

- Impossible to distinguish individual contributions,
- undermining reliability and fairness of assessment.

## Reflection

Which digital functions could Markus have used to make group collaboration transparent and assessable?

## 4. Sample Assessment Questions

Analysis:

- Questions focus on recall and surface-level understanding, not on application, analysis, or creation — the key levels of entrepreneurial competence.

What is the key issue?

- Poor alignment with EntreComp competences and EQF learning outcomes.

What is the consequence?

- Assessment fails to capture critical entrepreneurial skills like creativity, ethical decision-making, and initiative.

## Reflection

How can we redesign questions to move from remembering → applying → creating?

## Step 3: Redesigning

**What would you recommend in terms of**

- a. Strengthening Assessment Strategy
- b. Enhancing Evidence Analyses
- c. Improving Feedback and Planning
- d. Ensuring Fairness and Ethics?

**Here are some clues:**

- a. Strengthening Assessment Strategy
  - Rephrase the assessment questions
  - Use open questions
  - Example: Old: “Entrepreneurship is important. True or False?” / Improved: “Describe how your project contributes to sustainable value creation and explain one ethical dilemma you encountered.”
  - Promote the use of the “comments” function that explains the correct answer option.
- b. Enhancing Evidence Analyses
  - Verify authorship and contribution
  - Use tools like padlet to document reflection on teamwork and decisions
- c. Improving Feedback and Planning

- Avoid generic comments not linked to criteria or next steps
  - Use structured feedback templates
- d. Ensuring Fairness and Ethics?
- Make sure to verify authorship and authenticity, prevent AI misuse
  - Use reflective interviews or oral verification, e.g. short video calls
  - Incorporate AI declaration statements for transparency
  - Store learner documents according to GDPR

### TIPS FOR TRAINERS

- adopt a reflective mindset, not a judgemental one
- focus on competence, not digital technology
- maintain ethical and data-protective practices, also with digital tools.

### INTERACTIVE LEARNING SEGMENT:

#### Question 1:

Markus used the LMS activity logs to claim that all students were fully engaged because they logged in frequently. Why is this conclusion problematic?

A) High login frequency automatically means active participation.

**B) The logs show digital presence, not necessarily meaningful engagement or contribution.**

C) The logs should always be trusted as objective indicators of learning.

#### Question 2:

One of Markus's digital feedback comments read: "Good effort, but needs more detail." Why is this feedback ineffective in a digital learning context?

**A) It lacks personalisation and does not guide improvement.**

B) It focuses too much on the learner's effort.

C) It takes too long for learners to read and respond.

#### Question 3:

Markus created a multiple-choice quiz to assess "team collaboration" in entrepreneurial projects. What was the crucial error in designing?

A) Multiple-choice questions are too easy to score automatically.

**B) Collaboration is a complex, applied competence that cannot be validly assessed by a simple quiz.**

C) Learners dislike quizzes in online settings.

## ASSESSMENT

Trainers' participation and outputs can be assessed through:

- Completion of the tasks / documents
- Short written or audio reflection on lessons learned from the case, focusing on how to avoid similar mistakes in their own practice.

Optional: Peer review and discussion among trainer groups can reinforce learning through feedback.

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