



**PECOS
4SMEs**

PERSONALIZED TRAINING
ON CROSS BORDER
e-COMMERCE

PECOS4SMEs

D5.5 Recommendations Programme

WP 5

Version 1.0 – 04/12/2014

Project	PECOS4SMEs			
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1	507562-LLP-2012-GR-Leonardo-LMP	PECOS4SMEs Proposal
2	507562-LLP-2012-GR-Leonardo-LMP	Evaluation Comments

Applicable Documents

ID	Reference	Title
1	FAVINOM Consultancies QMS	Quality Management Procedures

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Executive Summary

This document forms the D5.5 Recommendations Programme for the Implementation of the PECOS4SMEs Project (henceforth, "Project").

Southern Europe SMEs lack the needed knowledge to take advantage of the e-Commerce potential resulting in Southern Europe lagging within the e-Business area. PECOS4SMEs will develop a training programme concentrated on the provision of suitable knowledge and tools, which the SMEs can use to increase cross border eCommerce revenue. This includes changing sales and marketing strategies and new types of organisation and knowledge about e-Commerce technologies in a future world dominated by pervasive Internet.

The promotion of useful e-Commerce strategies for SMEs includes transfer of knowledge and practices from top performing countries in e-Commerce to lagers thus bridging the cross border sales gap between Northern and Southern Europe and helping the economic recovery of the hard hit South. As a consequence of the introduction of new technologies and concepts facilitating cross border e-Commerce, (e.g. effective link building, search engine user attitudes etc.), SMEs will make their businesses more profitable and improve their ICT and methodological competence for interactive and collaborative learning.

The project is co-funded by the Education and Culture DG under the Lifelong Learning Programme, Leonardo Multilateral projects.

The present document contains the recommendations which emerged from the execution of the project and were considered of value and should thus be preserved and communicated to a wider audience.

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Document Glossary

Term	Description
E&T	Education & Training
PQP	Project Quality Plan
SEM	Search Engine Marketing
SEO	Search Engine Optimisation
SME	Small and Medium Sized Enterprises

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1. Introduction

1.1. Purpose of the D5.5 Recommendations Programme

The purpose of the current D5.5 Recommendations Programme is to disseminate knowledge with regards to successful practices for the organisation and execution of an assessment cycle for an SME training programme.

Validating the outcomes of such projects is a critical task which is very difficult to carry out in a manner which will provide input for the next step, the commercialisation of the project. It is of high added value to record and disseminate things that worked well during this phase of the project.

1.2. Scope of the project

PECOS4SMEs will develop an innovative training system bringing new types of organisation and knowledge about e-Commerce technologies and trends and concentrated on transforming Internet trends into applicable tools for SMEs to change sales and marketing strategies. The approach to training SMEs is based on their situation (sector, financial capability, educational background, geographical location, existing infrastructure, etc.). After completion of the training, SMEs are expected to be able to engage foreign consumers by successfully implementing e-Commerce strategies designed specifically for them.

1.3. Project Objectives

The specific purpose of the proposed project is the development of e-Commerce oriented material delivered through a training system targeting solely SMEs and the deriving needs (e.g. websites friendlier to the foreign consumer, order tracking process, clear dispatch and return policies, etc.) with respect to effective use of the Internet as a sales channel. This includes changing sales and marketing strategies and new types of organisation and knowledge about e-Commerce technologies in a future world dominated by pervasive Internet.

PECOS4SMEs, in particular, aims to support European SMEs to:

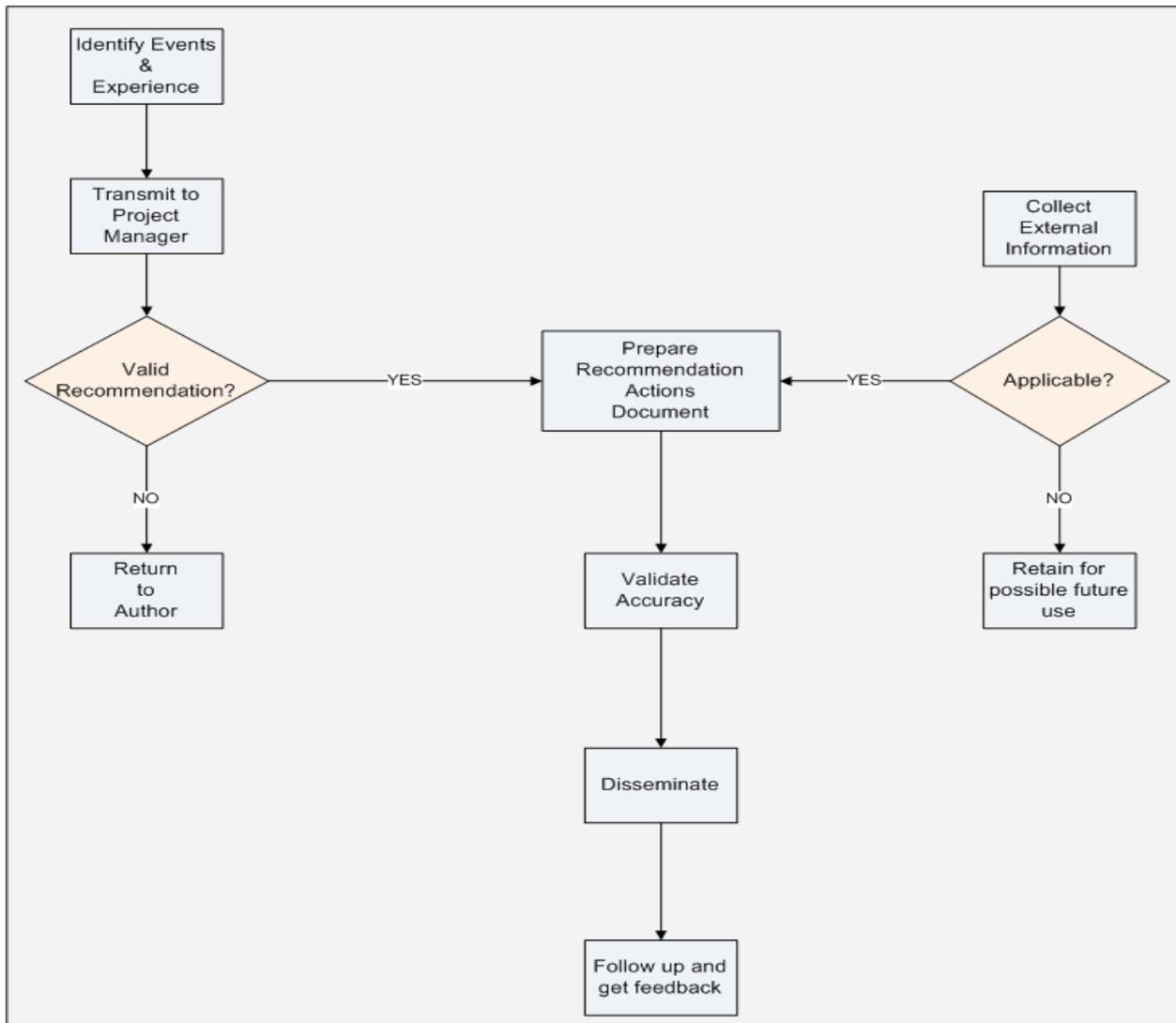
- ❖ Raise awareness and interest about cross border e-Commerce.
- ❖ Learn more about the risks associated with online payments.
- ❖ Learn more about the uses of the Internet as a revenue channel.
- ❖ Analyze the knowledge development in the SME and see the strategic perspectives of this knowledge in the context of the business strategy.
- ❖ Integrate e-Commerce in business planning and innovation strategies.
- ❖ Get the strategies written down, so they are not just ideas, but an active choice, which can be communicated and understood by SMEs.
- ❖ Get the strategies incorporated in practical procedures that can be constantly updated.
- ❖ Be aware of the European cross-border trade legislation and provisions of consumer rights.

An additional goal is to make it easier and less costly for businesses, particularly small and medium-sized enterprises (SMEs), to do business abroad and to enable consumers to reap the full benefit of the Single Market. This goal is aligned with the Europe 2020 strategy – launched on 3 March 2010 (IP/10/225) and with which the Commission is currently tackling bottlenecks in the Single Market to drive economic recovery.

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2. Recommendations Programme

The process for developing the recommendations programme is depicted graphically in the figure below:



Each recommendation is presented in the following way:

Table 1: Recommendations Template

ID/Type	
Description	
Concept to be supported	
Implementation	

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approach to follow	
Goals satisfied	
Associated risks	

The recommendations are derive from the execution of the assessment exercises and the hands on training sessions.

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3. Recommendations

3.1. Planning

3.1.1. Plan well in advance

Table 2: Advance Planning

ID/Type	REC01
Description	Advance Planning
Concept to be supported	The vast majority of SMEs do not have time to spare regardless of how interesting an event may be and how linked to their business needs. Furthermore they are frequently disappointed by what they get in return for their time as many SME oriented activities are not so SME oriented but only advertised as such. Advanced planning is key.
Implementation approach to follow	<ul style="list-style-type: none"> - Locate dates which are more likely for SMEs to devote some of their time (e.g. periods when business is 'slow' due to seasonal reasons) - Set up a wiki with full information about the event, purpose, agenda, all kinds of details describing in full what the SME should expect. - Allow SMEs to register for the event and follow up with them by sending frequent reminders. - During the last 2 weeks before the event try to engage into direct contact also through phone in relation to the event. <p>Eventbrite and most frequently used Wiki's (e.g. Google wiki) are adequate tools for the task.</p>
Goals satisfied	Achieve adequate participation levels
Associated risks	"relaxed" presentation of the event and follow up

3.1.2. Adopt a 'quick win' approach

Table 3: Advertise the 'quick wins'

ID/Type	REC02
Description	Quick Wins
Concept to be supported	The microcosm of your project and your general objectives about how to shape the E&T of the future is of no interest to SMEs. No serious SME will be persuaded to attend your validation event unless it is absolutely clear to the SME what it will gain. Benefits need to be as SME-specific as possible.

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Implementation approach to follow	<ul style="list-style-type: none"> - Elaborate a promotion strategy for the assessments around the concept of 'money': SMEs attending the event will learn how to make money. - Identify the "quick wins", i.e. actions the SMEs can immediately implement and see the difference in their online sales revenue and put focus on them in order to grab the attention of the audience. Then, move to more complicated and time consuming actions.
Goals satisfied	Achieve adequate participation levels
Associated risks	Failure to disseminate compelling "quick wins"

3.1.3. Personalised invitations

Table 4: Individualisation

ID/Type	REC03
Description	Personalise Invitations
Concept to be supported	The number of SMEs needed for a useful assessment exercise is not extreme. There is no need for mass invitations to be send out approximating a "spamming" campaign. The effort to make a high level study of an SME business and result to a somewhat personalized invitation to the event is reasonable. It is estimated that in 30 minutes it is possible to learn a lot about an SME starting with the weaknesses of its current website. This knowledge could be used for preparing a personalized invitation to the SME maximizing chances on convincing the SME.
Implementation approach to follow	<ul style="list-style-type: none"> - Start with 10 personalized invitations to get a feeling about how much time is necessary to produce a good personalized invitation. - See how many out of the 10 SMEs demonstrated a genuine interest to participate and follow up with them. - If the results are promising, continue with more personalized invitations in order to ensure the necessary participation numbers.
Goals satisfied	Achieve adequate participation levels
Associated risks	Achieve opposite outcome by making the SMEs suspicious because of the "style" of the personalised invitation. If possible seek advice from people with specialized knowledge on communication.

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3.1.4. Multiplication

Table 5: Multiplication

ID/Type	REC04
Description	Achieve maximum benefit through multiplication
Concept to be supported	You can maximize your chances for a successful assessment and efficient dissemination by linking the assessment event to an already established and recognized bigger event. A “workshop” on the agenda of a wide SME oriented event will increase your reach to the SME audience potentially leading to several assessment sessions in the same day.
Implementation approach to follow	<ul style="list-style-type: none"> - Start with the identification of SME oriented events with high visibility. Usually these will be annual events which run already for a number of consecutive years and have high visibility including media attention. - Talk to the people organizing such an event and try to arrange a “win - win” situation. - If necessary to convince organisers, “hide” the assessment under a workshop on cross-border sales. After all this is what it is. - Up to a certain cost associated with this activity is well worth it in terms of dissemination also. - If the associated event is not a well-established one, it will still serve much better than an isolated assessment exercise and associated costs may not be necessary.
Goals satisfied	Achieve adequate participation levels / disseminate project
Associated risks	Associated event gets cancelled for reasons beyond your control.

3.1.5. Overall Promotion

Table 6: Overall Promotion

ID/Type	REC05
Description	Promotion, promotion, promotion
Concept to be supported	Utilise all promotion channels at your disposal in a systematic way by listing promotion means and quantifying their use. The promotion strategy should join all items together in order to maximize impact. Specific promotion actions should be linked to individual deliverables and to sets of deliverables.
Implementation approach to follow	<p>Good ideas are:</p> <ul style="list-style-type: none"> • Plan and organize dedicated events, preferably connected to other events to maximize presence

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	<ul style="list-style-type: none"> • Adopt practical approaches such as hands on exercises • Design and distribute professional newsletters • Share items across social media on regular bases • Use direct mailing with a professional email marketing tool • Do onsite visits to target groups • Publish press releases • Put on the project website SME testimonials
Goals satisfied	Achieve adequate participation levels / disseminate project
Associated risks	It is necessary to think about timing. Only make communications when there is something worth saying or results will be negative.

3.1.6. Establishing working Relationships with SME Chambers

Table 7: Establishing working relationships with SME chambers

ID/Type	REC06
Description	Establishing a working relation with intermediaries which have direct access to the target groups.
Concept to be supported	The SME target group is hard to reach in an effective manner as it is not homogenous and does not trust easily. The best approach is to establish a good relationship with trusted intermediaries such as the various chambers. It will be much easier and much more effective to reach target audiences through such trusted intermediaries.
Implementation approach to follow	Identify the people behind SME oriented awareness and education actions and establish contact. Start by attending such events to see the level of organisation and the value of the knowledge disseminated. Come up with a proposed activity which meets at least those standards or better, exceeds them and talk to these people. If they are convinced about the value of your messages they will want to pass them on to their members providing you with the opportunity to reach larger audiences.
Goals satisfied	Reaching target groups massively and effectively
Associated risks	Poor planning and execution

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3.2. Organisation

3.2.1. Choosing the correct approach

Table 8: Choice of Execution Approach

ID/Type	REC07
Description	Choosing the right approach depending on relations with the target group and their specific needs and constraints.
Concept to be supported	<p>The targeted SME sectors and subsequently the participants are very specific. This doesn't necessarily mean that a 'one-size-fits-all' approach should be adopted. The approach should better match the sector(s) which will be represented the most in the assessments.</p> <p>As a reminder, the targeted SMEs belong to the following industries:</p> <ul style="list-style-type: none"> • Wholesale and retail trade • Manufacturing • Real Estate • Accommodation. • Construction <p>The participants are mainly:</p> <ul style="list-style-type: none"> • Entrepreneurs/owners • Manager; key decision makers - those that have influence on strategic decisions.
Implementation approach to follow	<ul style="list-style-type: none"> - Identify the sector(s) which will bring the most participants to your assessment - Review once again the strategies for this sector(s) and prepare your demo/example scenarios accordingly (e.g. if accommodation sector is the most represented sector in your assessment, ordering and delivery actions are not of high importance for your demo/example scenarios for introducing participants to the platform while booking and promotion are). - Finally choose wisely between online assessment, face to face assessment or combination of both based on your resources and characteristics of the targeted SMEs.
Goals satisfied	Achieve good feedback from participants
Associated risks	Inadequate preparation results in failure to convince the audience(s).

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3.2.2. Preparation is key

Table 9: Prepare for success

ID/Type	REC08
Description	Prepare well for the day to appear professional and avoid surprises
Concept to be supported	Overcome natural resistance of SMEs to trying new ways of doing things and especially for trying out software applications. Unless everything works perfectly without issues barriers will not be lifted and the training programme will not achieve extensive use.
Implementation approach to follow	<ul style="list-style-type: none"> - Identify the sector(s) which will bring the most participants to your assessment - Review once again the strategies for this sector(s) and prepare your demo/example scenarios accordingly (e.g. if accommodation sector is the most represented sector in your assessment, ordering and delivery actions are not of high importance for your demo/example scenarios for introducing participants to the platform while booking and promotion are).
Goals satisfied	Achieve good feedback from participants
Associated risks	Inadequate preparation results in failure to convince the audience(s).

3.2.3. Collecting Feedback

Table 10: Facilitating Analysis of Results

ID/Type	REC09
Description	Establish a feedback collection mechanism
Concept to be supported	Unless you have a way to document the conclusions from the execution of the assessment exercise real time, chances are you will lose important information. Establishing a feedback loop is important because the exercises will take place sequentially and every next assessment can benefit from the previous one. Feedback is also necessary for assessing the quality of the assessments and thus their contribution to the final result.
Implementation approach to follow	<ul style="list-style-type: none"> - Determine what needs to be measured and documented during the exercise. - Design the feedback collection mechanism(s). Usually a combination of offline/online mechanisms. - Make the collection tools an integral part of the assessment. <p>* Important elements to collect feedback on comprise inconsistencies arose from the evaluation (if any) and proposals for improvements and adaptation of the PECOS4SMEs system in relation to its parts: technical, training contents, user-friendliness, usefulness.</p>

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Goals satisfied	Maximum benefit from assessments / Continuous improvement
Associated risks	Inadequate feedback collection process and/or application.

3.2.4. Elaborating an Evaluation Methodology

Table 11: Evaluation Methodology

ID/Type	REC10
Description	Elaboration of an evaluation plan/methodology
Concept to be supported	<p>The assessment exercises are an instrument of an overall evaluation methodology which you need to have in place beforehand. The purpose is to determine the kind of feedback which is necessary for taking the project to the next level and to guide the project team to choose appropriate instruments (questionnaire, user group, learning log, web log, stats analysis, interviews, etc.) to collect the necessary feedback. The assessment exercises are a key instrument of the evaluation methodology and should return feedback on items such as:</p> <ul style="list-style-type: none"> • Platform usability, efficiency and effectiveness • Ability of the PECOS4SMEs training system to enhance learning • More specifically, the assessment will cover: <ul style="list-style-type: none"> • Selection of participants – at least 60 (15 per country) chosen among managers, directors of SMEs • Organization & execution of assessment exercises • Description of tools for capturing user feedback • Methodology for assessment of results and identification of improvements and corrections • Application of quality metrics defined in PQP (D8.1) for assessment exercises • Time plan for integration of feedback, corrections and improvements
Implementation approach to follow	Elaborate a complete evaluation methodology describing in detail the inputs and outputs of the assessment exercises without forgetting to analyse the ways to obtain and present the outputs.
Goals satisfied	Maximum benefit from assessments / Continuous improvement
Associated risks	Inadequate evaluation methodology

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3.2.5. Addressing the Infrastructure

Table 12: Infrastructure Requirements

ID/Type	REC11
Description	Determining what is needed in terms of infrastructure.
Concept to be supported	This more relevant to assessments with the physical presence of the SMEs as there are several infrastructural items to consider in advance from the most obvious ones such as an Internet connection to the more unexpected, such as the pre-installation of any special software or any un-envisaged incompatibilities.
Implementation approach to follow	<p>There is no approach to guarantee that everything will be thought out in advance unless a trial assessment takes place in the exact same location where the actual assessment will take place. In other words a rehearsal is the best approach.</p> <p>Some things to consider are:</p> <p>Hardware: Since the assessment sessions will illustrate the technical products and most importantly the way that the Genie produces the personalised e-Commerce strategies, then in the event venue must be equipped with a number of personal computers/laptops equal to the number of participants</p> <p>Projector: A projector connected to the instructor's laptop.</p> <p>Software: WiFi internet connection.</p> <p>Stationary: Printed credentials for SMEs in order to access the platform.</p> <p>Content:</p> <ul style="list-style-type: none"> - Have ready a set of credentials (or ask participants to register) - Assessment wiki page with info about the project and purpose of assessment and benefits for participants, location details, time, etc. - Introductory presentation - Project video - For SMEs: What you are about to do (Video to be prepared) - - Prepare a case scenario to demonstrate the use of the platform (could be done on Prezi or on Camtasia) - Electronic questionnaire and survey for documenting feedback and evaluating against targets (get the targets from proposal sections)
Goals satisfied	Executing a successful assessment / Obtaining good feedback
Associated risks	Failure to predict issues before execution date and inadequate reaction

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3.3. Execution

3.3.1. Interactivity and inclusion

Table 13: Interactivity and Inclusivity

ID/Type	REC12
Description	Deliver an interactive session ideally with collaboration elements
Concept to be supported	Presentation is everything so the project outcomes should be presented in a way which corresponds to the amount of work and money put into their development and not just thrown on the table as no one will invest time to use them.
Implementation approach to follow	Start simple by explaining very clearly in a language appropriate to the SME audience what they are about to do. Consider an animated video of around 90 seconds for this (refer to explania.com for examples). Then, it is good to proceed to the hands on demo of the platform by preparing a descriptive scenario which covers all the main functionalities and is preferably of high interest to the majority of SMEs. This scenario is better to demonstrate with a video (e.g. camtasia, captivate) recorder when the scenario was run in a perfectly controlled environment. It is best to avoid executing this scenario, which will be the first contact the audience will have with the tool, real time as anything can happen and it is easy to lose your audience.
Goals satisfied	Delivering a professional presentation of the training system
Associated risks	Failure to predict issues before execution date and inadequate reaction

3.3.2. Support

Table 14: 1st, 2nd and 3rd level support

ID/Type	REC13
Description	Provide support to your pilot users
Concept to be supported	Presentation is everything so the project outcomes should be presented in a way which corresponds to the amount of work and money put into their development and not just thrown on the table as no one will invest time to use them.
Implementation approach to follow	Elaborate a simple roll out strategy for the pilots. Part of this simple document, apart from time plan and infrastructure required, draw an

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	organogram displaying roles to be undertaken during the pilot period. In a table under the organogram assign these roles to specific people and provide their contact details. The goal is to be able during the pilot period to have in place a simple process for resolving issues, starting from simple functionality issues (1 st level) to logical bugs which could be resolved without a redeployment (2 nd level) but also "show stoppers" (3 rd level)
Goals satisfied	Support the trials of the system by external users
Associated risks	Support people not reachable and/or not responsive

3.3.3. Implement

Table 15: Implement actions on the spot

ID/Type	REC14
Description	Proof of time invested
Concept to be supported	It is very hard for SME to be convinced that the time they will spend will be worth it. The good thing is that it is not necessary to convince all SMEs but if a fraction of them are truly convinced they will have a positive influence on the rest.
Implementation approach to follow	Identify some promising SMEs from each sector, by promising meaning SMEs who are likely to invest more time on the tool once they are convinced and who are not inherently negative. Based on their personalised strategy work with them for implementing some of the actions, the "quick wins" and analyse the results together. The feedback to be obtained by the SME, positive or negative will be of great value to the tool.
Goals satisfied	Convince users on ROI
Associated risks	Poor preparation and inability to implement chosen actions will turn SMEs away for good

3.3.4. Do yourself instead

Table 16: Do it yourself

ID/Type	REC15
Description	Do it yourself
Concept to be supported	Engage with SMEs more effectively by providing them with the outcome yourself instead of the other way around.

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Implementation approach to follow	Gather data for the personalised strategy by SMEs via the phone, email or face to face. Start with SMEs that may have already made a profile on the Genie. Create the strategy on their behalf. Discuss with them the automated assessment report and convince them to do implement some of the proposed actions together. Follow up in due time to see any results and get feedback.
Goals satisfied	Achieve better interaction with target groups
Associated risks	Confidentiality issues may surface

3.3.5. Adapt

Table 17: Adapt

ID/Type	REC16
Description	Adapt during execution by introducing new actions/content or updating existing
Concept to be supported	The real goal is to engage in a creative dialogue with SMEs on the subject and make them interested in the project. What better way than making them part of it.
Implementation approach to follow	Take advantage of different views raised during SME sessions by adapting the actions/content or introducing new ones. Make the SMEs co-authors of the content and mention them in a page of the project website listing the contributors.
Goals satisfied	Achieve SME engagement
Associated risks	Impossible to reach consensus on improvements