



# Innovative Operational Support Methodology (IOSM)

(MAN-BOOST-WP2.1.1.UK-[En])

Final Version

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## Introduction – working with micro and small businesses.

Approximately 92% of businesses in the European Union employ less than 10 people, with another 7% less than 50, so are of fundamental importance to the EU.

Much research has been done on the approaches needed when working with businesses employing less than 20 employees. (For example, see [a research paper by SFEDI \(UK\)](#))

Some of the **small business context points** can be seen below and **have been taken into account in the development of this innovative operational support methodology (IOSM)**.

### *Business relevance*

- The learning, training and development agenda must fit with the world of MSEs and recognise their particular needs and the constraints they face.
- Engagement will be greater if small businesses are encouraged to identify the benefits that they can derive from these activities.
- The benefits of learning need to relate to the short strategic business planning time frames in small businesses. The time frame reduces with the size of a business; six months is a long time ahead for a very small, less established business.

### *Time constraints*

- The smaller the business the less formal the management of the business and the less time is available for planning, learning and development.
- The difficulty of taking time off work for learning is an even greater constraint on owner-manager and key worker participation in training than the direct cost of training.
- Training and development opportunities for owner-managers and other key workers need to be available at the time of their choosing, including in the evening and at weekends.

### *Cost constraints*

- Businesses are more likely to be willing to pay for learning, training and development when they have experienced the benefits.
- Small businesses do not make their greatest investment in learning in developing management and leadership skills.

### *Motivations and priorities*

- Learning, training and development activities are a relatively low priority for small businesses.

## **Pedagogy**

### *Learning styles and focus*

- Learning needs to be integrated with the daily activities of the business and relevant to the issues that confront it.
- The effectiveness of learning, training and development material for use in the small businesses environment will be more effective the more they replicate the informal, experiential learning styles that small business personnel prefer.

- More effective learning occurs in start-up and small businesses if the learning is directed at solving problems for the business.

#### *Learning from others*

- A preferred learning method for owner-managers is from the experiences of other small businesses. Many small businesses confront similar problems and can learn from each other.
- Facilitating engagement with learning activities should follow the natural contours of the small business world and may occur via individual advisor contacts, local agencies or sectoral bodies.
- Bringing small businesses into learning clusters is an effective means of increasing learning between small businesses, even if contacts are conducted at a distance.

#### *Materials and activity requirements*

- Learning materials are more effective if they are in plain everyday language.
- Learning activities need to be available in 'bite-size' units of about 15 minutes in order to be appropriate to owner-managers, many of who will have heavy constraints on the time available for their own learning and development.

## Background to the Distance Travelled Tool.

In addition to the above, the whole project is based on the fact that many small businesses have no record of their learning experiences and the contribution and benefits that brings to increased competitiveness and the further development of the business. Similarly, many individual employees have no concrete way of understanding how their own learning, both formal and informal, contributes to the overall business performance. These issues, however, were previously started to be addressed in a UK Equal project and the approach to this methodology is based on this work. For example, [Annex 1](#) describes the background to the Distance Travelled Approach.

As indicated above, training options offered to small and micro businesses are often based on standard courses which are sometimes not appropriate to the real business needs of the enterprise. This project seeks to incorporate the use of customised search engines and customised materials into the learning offer to small and micro enterprises, across a range of sectors, employing less than 20 employees, thus matching the learning to the needs of the enterprise.

In this project, the methodological approach and utilisation of a "Distance Travelled Approach" will be adopted and refined in the light of the more sophisticated on-line tools being developed. However, the basic premises and approaches will be those successfully developed in the elearn2work project Equal project.

## Key ideas.

1. The Business Critical Needs<sup>1</sup> (business critical goals) will be the starting point for all activities.
2. These will be identified either internally within the enterprise by management and / or with the help of an external business consultant /adviser.
3. Their respective importance will be rated.
4. For those which can be addressed by learning, indicators will be developed at company level (and for individual employees). This will probably involve a trainer (external or internal).
5. These learning indicators will be rated in importance by the management of the enterprise as will the current positions and targets for the company as a whole and individual employees.
6. All the above will be inserted into the tools on the BOOST platform.
7. Learning resources will be identified by a trainer appropriate to each employee's learning requirements.
8. These resources will be made available to the individual employee through their on-line learning space or they will be directed to off-line training where appropriate.
9. The individual employee will encouraged to self-assess progress and further discussions will take place with a trainer / manager to agree on progress.
10. Progress in achieving the learning indicators will be recorded.
11. The BOOST tool will collate data and demonstrate graphically the impact of the training on individual employees and the company as a whole. This will be in terms of the learning indicators associated with each Business Critical Need / Issue (Business Critical Goal).

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<sup>1</sup> Business Critical Need / Issue is that which is fundamental to the survival or future success of the enterprise

## Getting in touch with the business – the marketing phase

This stage assumes that you are an external organisation / project partner who do not have a current relationship with the small / micro business. Obviously this engagement stage is not always applicable. The potential marketing activities are shown in Figure 1 below.

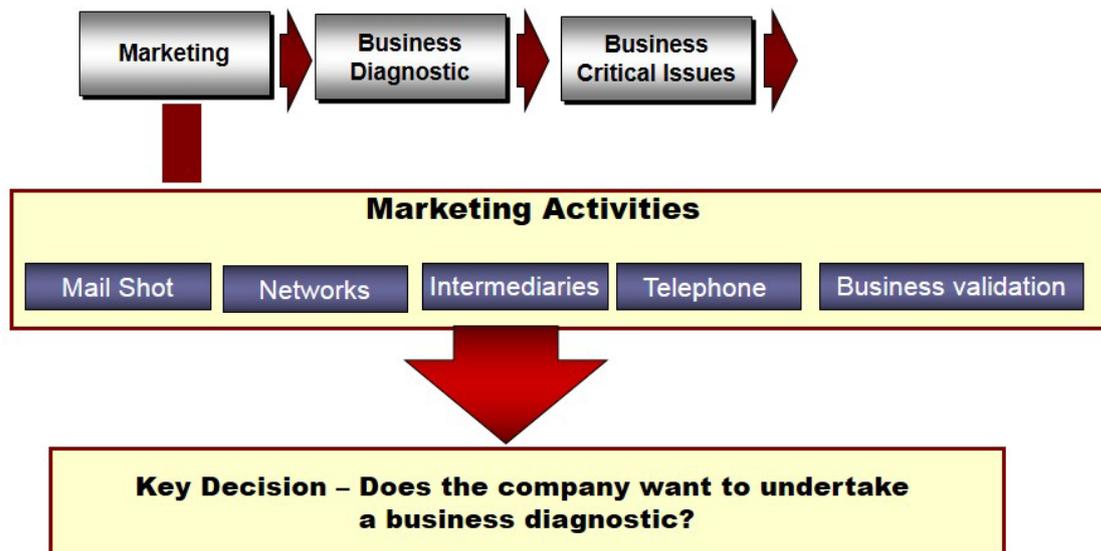


Figure 1 Potential Marketing Activities

Your choice of marketing activities will depend on your target group and most appropriate way of communicating with them – partners in the project will have already identified communication pathways in their dissemination plans.

The project deals with micro and small enterprises from a range of sectors and with very different experiences and commitments to learning. The offer needs to address their needs, in their language (business speak as well as native) and with their abilities /capacities in mind.

Sample communications examples can be found in [Annex 2](#). These examples show the focus of the communications to owner managers / employers being around areas such as:

*Do you want to see how your business performance improves with the training given to your staff?*

*Does the training your employees undertake focus on what your business needs to improve?*

*Do you want to see easily, at a glance, on one page, simple diagrams showing the impact of the training on your business?*

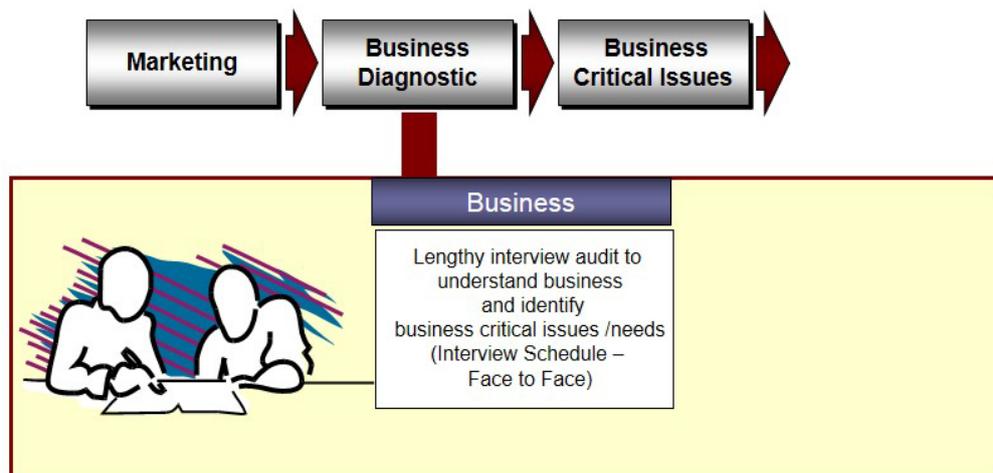
*Do you want to be able to see how each individual employee's training is contributing to your business?*

*Do you (and your employees) want to see how their training, whether on a course or on the job, helps the business improve?*

*If so, use BOOST and see the difference.*

## The Business diagnostic.

Once a business has been recruited, then it is important to organise the business diagnostic. See Figure 2 below.



**Figure 2 Business Diagnostic**

If external business advisors / consultants are involved, then this will be a face-to-face interview with the owner-manager or a senior manager at a time and location to suit them. A suggested interview schedule / reporting form is attached as [Annex 3](#) but this might need to be modified depending on time availability within the business.

Businesses should be advised well in advance of the likely topics to be covered. This is a potential list of topics (likely to be modified in the light of the current knowledge of the business):

- General information about the history and nature of the business/organisation
- The impact of competition (and other external drivers) on the business/organisation
- Recruitment issues
- Communication techniques within the business/organisation – how and when?
- The kinds of training and learning that the business/organisation already invests in, criteria for undertaking training, and any plans for development
- Attitudes towards training, including the experience and expectations of it, and past impact of it on the business
- Awareness and recognition of any informal learning within the business/organisation
- The experience and expectation of e-learning – including use of technology, support for e-learning, any technical issues

It will be critical to ensure that the interview is well-managed in terms of:

- time taken out of a busy business schedule
- clarity of business outcomes for the management by the end of the interview,
- next steps and time frames indicated

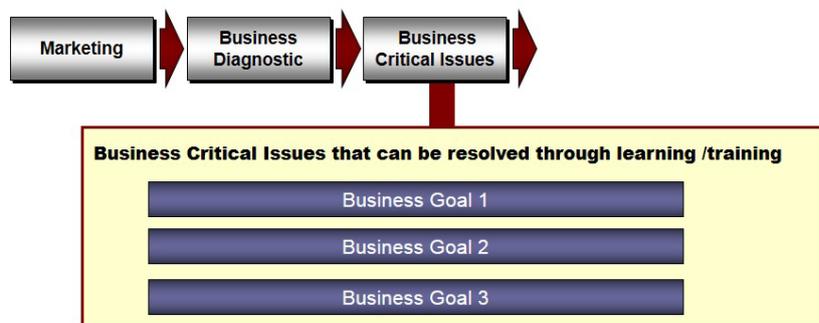
If the small and micro business is a high knowledge one then the managers themselves might wish to carry out the initial review internally.

The key results from the Business Diagnostic will be the initial identification of the Business Critical Issues / Needs.

These will then be refined – see below.

## Business Critical Issues / Business Goals to be addressed through learning

The key results from the Business Diagnostic will be the initial identification of the Business Critical Issues / Needs. *These will be then be refined to those that can be addressed through learning / training.* To give a more positive outlook, these will now be referred to as Business Goals, however the essential criticality must not be forgotten.



*Figure 3 Main results at the end of the business diagnostic*

The next stage will be for the business adviser / consultant / manager to work with the business to prioritise the Business Goals.

They will then be entered into the Management Area on the BOOST platform. (Details of how to use the BOOST platform will be included in a separate document.)

## Identification of employees.

The next stage will be for the management of the small / micro business to identify potential employees who need to learn / be trained to address these Business Goals. This is an internal process. **It might be that this stage is NOT possible until after the creation of the learning indicators.**

A possible form is included in [Annex 4](#).

## Creation of Learning Indicators.

Learning indicators will then be identified for each of the Business Goals. This will be a two-stage process as shown below.

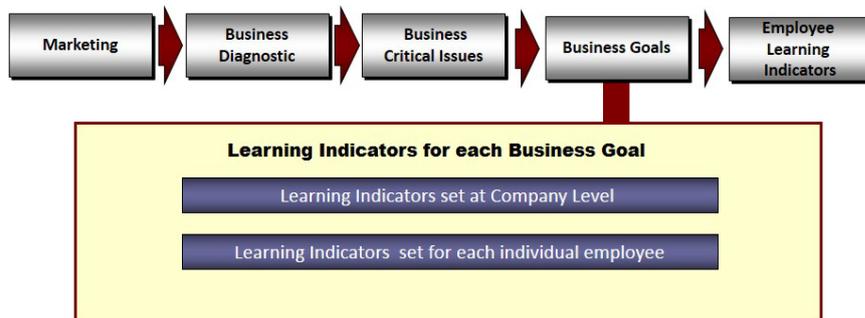


Figure 4 Creation of Learning Indicators

Initially, indicators will be developed at company level for each Business Goal. This will probably involve a trainer (external or internal) as well as business personnel but in high-knowledge companies might be just the latter.

The format of the company learning indicators will vary but they need to be as specific as possible. Examples from previous projects can be found in [Annex 5](#)

However, it should be noted that changes might take place with regard to the definitions, after the discussions with individual employees, in order to ensure the appropriateness of the Learning Indicator to an individual employee.

These learning indicators will be rated in importance by the management of the enterprise by setting the Priority Rating – High or Normal. This will be entered in the Management Area on the BOOST platform.

A potential form for completion off-line is included in [Annex 6](#).

## Application of Learning Indicators to each participating employee.

The manager, together with the trainer<sup>2</sup>, will agree on the relevant learning indicators to be allocated to or devised for each individual employee. (These will be inserted into the Business Goals in the Management Area either at this stage or when all the information from discussions with the employee have taken place – see below.)

Individual employees will then be “interviewed” with respect to the identified Business Goals and the associated Learning Indicators relevant for them. (This is likely to be by a trainer but could be done internally by managers / supervisors.)

The employee will be asked to assess informally their current position (the start position prior to learning / training). Together with management feedback, they will set their targets with the trainer and the time frame for their achievements. The priority ratings will be those set by the business and

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<sup>2</sup> In some high knowledge businesses, employees will undertake this themselves but this will be the exception rather than the rule.

will have an impact on the time frames set for each indicator. (Obviously, those with the highest priority will need to be addressed first.)

As there might not be access to the BOOST platform in certain working environments, an off-line form is available for use. A sample document is provided in [Annex 7](#).

Once access becomes available, this information will be entered into the Boost Platform - see User Guide.

## Allocation of learning resources

Once the learning indicators have been identified with each individual participating employee, then resources will need to be identified to ensure that the target for each one is met by the learning undertaken by that employee.

The trainer<sup>3</sup> by this stage will have gained knowledge of the types of materials appropriate to that employee. They will then search the appropriate repositories for links / actual resources and add them to the Learning Resources. (See Boost Platform User Guide). In some instances off-line courses will be most appropriate and these should not be excluded from the offer. Learning Resources will be indicated in the Learning Area by "Name", "Description" and "URL".

If resources cannot be found then the Trainer will insert relevant information into the Requirements Bazaar which is the collaborative platform for communication between end-users (or their representatives) and developers. Information on how to use the Requirements Bazaar will be added to the BOOST Platform User's Guide.

The trainer will support the employee to access their Learning Space and also provide on-going support if that is required.

## Learning Indicator Progress reviews

The nature of these (off-line or on-line) and their frequency will depend on the business and its way of working.

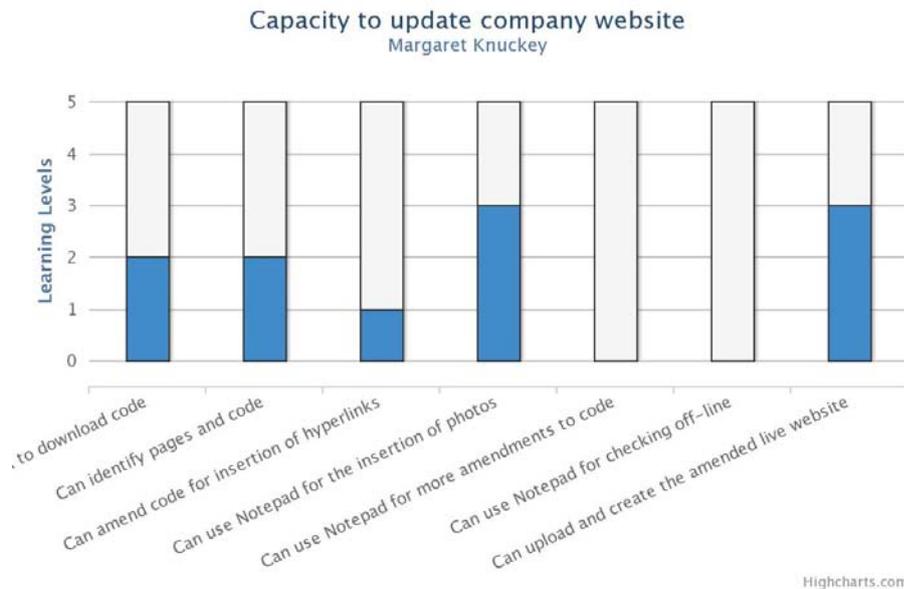
At the meeting when the learning indicators are agreed and / or when the learning resources are allocated, the trainer will agree the plan for on-going reviews with both the management and the individual employee.

These reviews will focus principally on the trainer discussing progress with the employee, however, supporting "evidence" can be presented in the form of documentation, interviews with peers and management.

The result will be an agreement on the progress achieved. This will then be entered into the BOOST platform for the business management and the employee to review.

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<sup>3</sup> In some instances, employees can identify their own resources and also management could allocate but this is unlikely to be the situation with most micros and very small businesses



*Figure 5 Sample of employee progress chart*

If agreed targets have not been achieved, then further actions will be planned with the employee and manager. This might include a review of the learning resources used to date and the need to sources alternatives or additional support in their use.

If the initial targets have been achieved, then any further learning indicators with an initial lower priority rating will now be addressed in the manner described above.

Employees should be able to access and keep a record of their achievements.

## Employee and Employer Reviews of achievements

This is the key and innovative stage of this initiative. Graphical images will be produced for individual employees to show learning progress. Aggregated results from employees for each learning indicator and for each Business Goal will also be available.

These aggregated results should show very clearly the benefits of the learning / training of individual employees on the business as a whole addressing business critical issues through the achievement of the business goals. They will also demonstrate the areas which offer opportunities for further development.

The aggregated results will be reviewed with management (and with individual employees subject to management approval).

Samples of potential images are shown overleaf but note that more information is available if viewed online as more information is produced by hovering over the image.

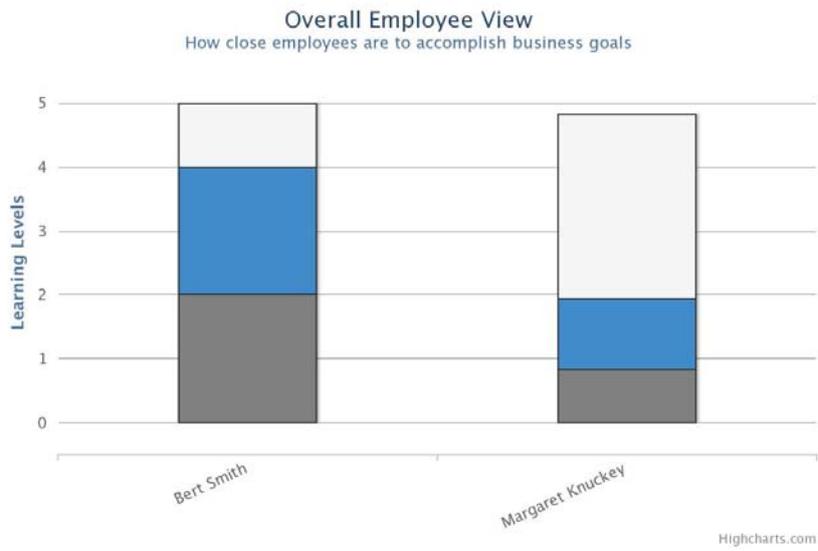


Figure 6 Overall Business View of employee progress

## Annex 1. Origins of the Distance Travelled Tool and its concepts.

Many small businesses have no record of their learning experiences and the contribution and benefits it brings to profitability and the further development of the business. Similarly, many individual employees have no concrete way of understanding how their own learning, both formal and informal, contributes to the overall business performance. A tool that enabled both the business and the workforce to see how their active roles as formal and informal learners within the company could enhance the performance of the overall business, and how individual skills complemented each other, could be both innovative and empowering.

MRS, in the Equal elearn2work project, saw an opportunity to provide a tool that would give a clear visual representation of the progress of the business as a whole and of individual employees contributing their own learning to it. A tool was needed to map and demonstrate the distance travelled during each learning journey.

So the main purpose was to record and provide potential analysis of the learning progress that each business and its individual employees would undertake. Over a series of different time periods, data is collected to understand and annotate the “learning journey” for each business, and take “snapshots” on the road travelled. The journey’s start point may be known and the destination may be anticipated, but the learning road ahead is unknown and unseen. As each step is taken on the journey, the “map” better defines the progress of travel – and what spontaneous, informal, unforeseen interventions and modifications also occur during it, since the travel is not necessarily smooth and linear, but twists, turns and cul-de-sacs are experienced on the way.

The journey is towards the achievement in addressing the Business Critical Needs which we now refer to as Business Goals. These are initially identified from discussions with the business. Many factors may contribute to the whole experience of learning, and both positives and negatives needed to be recorded.

#### ■ **Summary of the rationale**

- To capture more comprehensively and robustly the reality of learning in small and micro businesses
- To record in detail how learning actually occurs in the day-to-day activities of a business, what unplanned successes and disruptions occur etc
- To relate individual employee development to overall business needs and skills gaps and how they are achieved

## Annex 2 Sample Communication Devices



## Annex 3 - Interview Schedule

<b>Potential Interview Topics with owner-managers/ employers/senior managers</b>
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	<b>Lead-in Questions only</b>
<b>1 a</b>	What would you say are the main aims or goals of the business?
<b>1 b</b>	How would you describe the business in terms of its year by year performance?
<b>1 c</b>	Could you describe the busy and slack periods of activity within the business over the year?
<b>2</b>	What sort of competition are you facing / who are your competitors?
<b>3</b>	How do you communicate with your employees? Informally face to face, team meetings, notice boards, email, newsletters?
<b>4</b>	Do you have / have you had any skills shortages within the business? Are you able to recruit to fill these gaps?
<b>5</b>	Would you say that there is a continuous pressure on yourself and your employees to gain new skills or abilities to enable the enterprise to continue to be competitive?
	What is your current approach to meeting these learning needs?
	What criteria would you use in deciding how much time, effort, and money you would invest both for yourself and for your employees?
	Would you say that your employees have time constraints which restrict formal training, especially if external?
<b>6</b>	Considering those courses you have mentioned, what are your views about training courses that you / your employees have taken part in?
<b>7</b>	We have talked about some general learning you have undergone, which was in a formal style, can we now look at some other ways in which you and your employees learn? (Explore concepts and practicalities of informal learning.)
<b>8</b>	Do you think the location of the enterprise could be a problem in accessing suitable external training? What experience have you had of the delivery of courses using 'e' facilities or using the internet to learn new skills?

## Getting to know the business – example of potential reporting format

Date:	Business:
Name of person(s) being interviewed:	Their role in the organisation:
Interviewer:	Relationship to the business:

### Interviewer notes.

The boxes below allow any responses to be recorded in relation to the 8 headings

Suggested factors for consideration are:

1. Nature of Enterprise - General information about the history and nature of the business/organisation
2. The impact of competition (and other external drivers) on the business / organisation
3. Recruitment issues
4. Communication techniques within the business / organisation – how and when?
5. The kinds of training and learning that the business/organisation already invests in, criteria for undertaking training, and any plans for development
6. Attitudes towards training, including the experience and expectations of it, and past impact of it on the business
7. Awareness and recognition of any informal learning within the business / organisation
8. The experience and expectation of e-learning – including use of technology, support for e-learning, any technical issues

<b>Factor</b>
<b>Response / issue</b>

<b>Factor</b>
<b>Response / issue</b>

<b>Factor</b>
<b>Response / issue</b>

<b>Factor</b>
<b>Response / issue</b>

## Annex 4 – Identification of Employees form

## Identification of employees for training / learning to achieve the Business Goals

**Name of Business /Enterprise :**

Please complete the form below and return to your designated trainer (external and / or internal).

Business Goal – write down in order of priority to your business / enterprise	Potential employees identified for training / learning		
	Name of employee	Their job / role in business	Potential dates / time for interview with trainer

Please feel free to add additional lines where required.

Annex 5 – Sample business critical needs. Business learning indicators and Individual Learning indicators from previous projects.

**THE LEARNING JOURNEY – RESEARCHER’S INPUT elearn2work Equal project UK**

NAME OF ENTERPRISE	
NAME OF EMPLOYER / EMPLOYEE [ <i>delete as appropriate</i> ]	
NAME OF RESEARCHER	

DATE	
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<b>■ BUSINESS CRITICAL NEED 2</b> Description	Skills and support to empower Spot-on as a social enterprise and to empower its employees
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DESCRIPTION OF LEARNING INDICATORS 1-5	
Estimating tool : To enable the management team to prepare accurate customer quotes for sub-contract packing operation	
Increase employability skills of employees and volunteers working in this area	
How to expand customer base	
Planning to be more competitive in the marketplace	
Implementation of e to assist in stock control	

## How BCN above and associated business learning indicators transferred into individual employee Learning Indicators

<b>■ BUSINESS CRITICAL NEED 2</b> Description	Skills and support to empower Spot-on as a social enterprise and to empower its employees
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### Business Learning Indicator 1.

**Estimating tool : To enable the management team to prepare accurate customer quotes for sub-contract packing operation**

### Individual Employee Learning Indicators

I can identify the key cost components of the packing operation
I can use the full mix of colleagues packing skills wherever possible
I can prepare an estimate that meets time and profit targets
I know how to use an excel spreadsheet-based tool to produce the estimate

## **Business Critical Needs & Business Learning Indicator Examples from Piloting phase of BeCome Project in Greece conducted by Asset Technology.**

### **BCN: Customer Satisfaction**

Description: Development of communication with customers and measuring their satisfaction

Business Learning Indicators

- Development of communication
- Investigation of customer needs
- Provision of personalized services
- Crisis management
- Customer satisfaction measurement

### **BCN: Development of New Services**

Description: Development of new products and services for private and/or public sector

Business Learning Indicators

- Research of market/ customers' needs
- Development of new product/service
- Promotion of new product/service
- New product/service evaluation

### **BCN: Negotiations**

Description: Successful negotiations with clients and suppliers

Business Learning Indicators

- Negotiations strategy and tactics
- Applying negotiations in practice
- Identification of 'Win-Win' or 'Win-Lose' situations
- Impact evaluation

## Annex 6 – Business Learning Indicators Form

BUSINESS LEARNING INDICATOR RECORD FOR COMPLETION OFF-LINE IN DISCUSSION BETWEEN MANAGEMENT & TRAINER

NAME OF BUSINESS	
NAME OF MANAGER	
NAME OF TRAINER	

DATE	
------	--

■ BUSINESS GOAL 1 Description	
-------------------------------	--

DESCRIPTION OF LEARNING INDICATORS	PRIORITY RATING	JOB ROLES IN BUSINESS WHERE APPLICABLE	TARGET EMPLOYEES

■ BUSINESS GOAL 2 Description	
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DESCRIPTION OF LEARNING INDICATORS	PRIORITY RATING	JOB ROLES IN BUSINESS WHERE APPLICABLE	TARGET EMPLOYEES

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<b>■ BUSINESS GOAL 3 Description</b>	
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DESCRIPTION OF LEARNING INDICATORS	PRIORITY RATING	JOB ROLES IN BUSINESS WHERE APPLICABLE	TARGET EMPLOYEES

## Annex 7 – Employee Learning Indicators Record

## EMPLOYEE LEARNING INDICATOR RECORD FOR COMPLETION OFF-LINE IN DISCUSSION BETWEEN EMPLOYEE & TRAINER

NAME OF BUSINESS	
NAME OF EMPLOYEE	
NAME OF TRAINER	

DATE	
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<b>■ BUSINESS GOAL 1 Description</b>	
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DESCRIPTION OF LEARNING INDICATORS	CURRENT POSITION						TARGET	PR	COMMENTS <sup>4</sup>
	0	1	2	3	4	5			
	0	1	2	3	4	5			
	0	1	2	3	4	5			
	0	1	2	3	4	5			
	0	1	2	3	4	5			
	0	1	2	3	4	5			

*< please circle or insert appropriate rating*

<b>■ BUSINESS GOAL 2 Description</b>	
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DESCRIPTION OF LEARNING INDICATORS	CURRENT POSITION						TARGET	PR	COMMENTS
	0	1	2	3	4	5			
	0	1	2	3	4	5			
	0	1	2	3	4	5			
	0	1	2	3	4	5			
	0	1	2	3	4	5			
	0	1	2	3	4	5			

*< please circle or insert appropriate rating*

<b>■ BUSINESS GOAL 3 Description</b>	
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DESCRIPTION OF LEARNING INDICATORS	CURRENT POSITION						TARGET	PR	COMMENTS
	0	1	2	3	4	5			
	0	1	2	3	4	5			
	0	1	2	3	4	5			
	0	1	2	3	4	5			
	0	1	2	3	4	5			
	0	1	2	3	4	5			

*< please circle or insert appropriate rating*

<sup>4</sup> In these cells you can record any further information pertinent to that employee such as Learning Style / Digital awareness and use that might reflect in the learning resources chosen.