

Internationalisation and Commercialisation for Business Clusters and Networks
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METHODOLOGY OF TRAINING FOR BUSINESS NETWORKS AND CLUSTER MANAGERS IN THEME INTERNATIONALISATION AND COMMERCIALISATION

**METODYKA SZKOLENIA
DLA MANAGERÓW SIECI BIZNESOWYCH/ KLASTRÓW W ZAKRESIE
INTERNACJONALIZACJI
I KOMERCJALIZACJI ZARZĄDZANYCH SIECI.**

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Introduction

The project Internationalisation and Commercialisation for Business Clusters and Networks (InterCom) is implemented in the framework of the Leonardo da Vinci Programme, Transfer of Innovation. The project started on 1 January 2014 and will last until the end of December 2015. The overall objective of the project is transfer innovative methods of internationalization and commercialization to business networks as well as contribute to social and economic cohesion of the CEEC. Specific aim is to increase skills of managers from business networks in Poland and Lithuania through delivering them special training on internationalization and commercialization. Under the project, the project consortium intends to propose to the selected individuals involved in the management of business processes and animating of clusters, training conducted by UK experts in the field of managing clusters, application of international projects and online promotion. The Consortium is going to provide the trainees with an access to modern techniques and analytical tools (among them Learning Management Platform for blended learning), as well as consulting services. Objectives of the project are as follows:

1. To assess the actual competence of the selected managers from business networks,
2. To train 20 business networks managers in internationalization and commercialization,
3. To develop 10 strategies for internationalization and commercialization of business networks,
4. To develop 2 Learning Management Platform for blended learning,
5. To amend the 10 strategies according to the feedback after the pilot phase,
6. To develop 10 information-rich websites for engaged business networks,
7. To develop the textbook and an article,
8. Disseminate results of the project in 1 international conferences.

This document refers to the second of the goals of the project, i.e. the methodology for the training of Trainees, recruited to participate in the project. The collected information about managerial competencies, as described in the Report *Analysis of networks manager competencies in internationalisation and commercialization of managed networks*, are to be used to develop a dedicated training program that prepares trainee to expanding

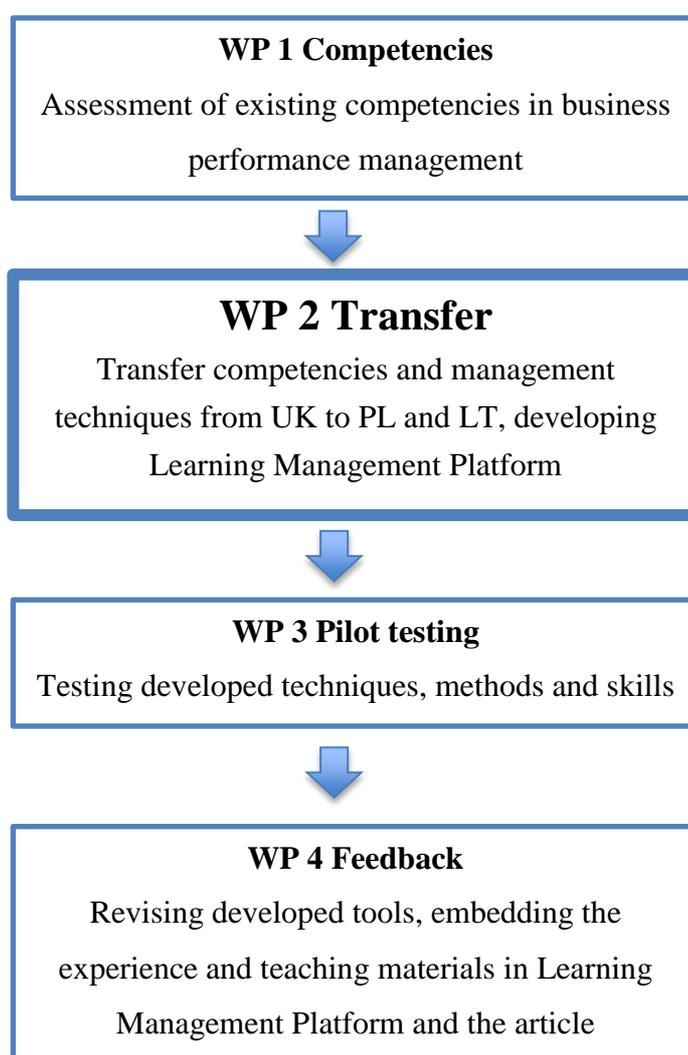
managed clusters' activities beyond national borders, as well as to increase the chances to internationalize the cluster activities and commercialize services that are offered. The whole content of this document it is supposed to be just for the internal usage of the Consortium, to work out the training programme for the coordinators of recruited business networks. The training activities are developed in order to guarantee and facilitate a future utilisation of the Learning Management Platform (which is also an outcome of the InterCom project), so it is worth to emphasise that all materials and modules of the training will be prepared both for two training session in Lithuania and Poland, as well as for end users of the Platform.

1. The InterCom Training Methodology

1.1. Overall InterCom Training Methodology

Within the project, the training occurs in the Work Package 2 (Figure 1.1.), which follows *Assessment of existing competencies in business performance management* (Result no 1 and Work Package no 1).

Figure 1.1. The division of the task between Work Packages



Source: Own

Following the initial interviews with clusters and the partner meeting in London on June 2014, we have outlined the general training framework recommended for the InterCom project. We propose utilising an integrated training and development framework which relies on five methodological elements (Figure 1.2):

- a) **Action Learning:** action learning modules will be delivered individually in Poland and Lithuania. Each module will comprise a group training session, together with remotely assisted learning and development, and will last between one and two months. These sessions are described in further detail below, and will be accompanied by two joint learning sessions not shown in Figure 1.1,
- b) **Action Planning:** This comprises the output of each action learning module. The participants in each training will be responsible for drafting a strategic plan for their two specific areas of operations, being key points of the InterCom projects: Internationalisation and Commercialization,
- c) **Pilot Testing:** This comprises testing each functional plan through actual cluster operations and its functionality on the Learning Management Platform - a software platform that allows training, teaching and interactive presentations to be delivered over the internet,
- d) **Remote Support:** This comprises long-distance coaching, mentoring and support by Navigator Consulting Partners to each cluster, for the purpose of completing their plans and training.
- e) **Sustaining the training's materials and products** through embedding them into Learning Management Platform, designed for blended learning.

The training will cover all outlined in the Report *Assessment of existing competencies in business performance management* competencies:

- 1) Communication skills,
- 2) Negotiation skills,
- 3) Project Management skills,
- 4) Project Application skills,
- 5) International Project Cooperation,
- 6) Budgeting and Price Analysis skills,

- 7) Marketing and Promotion skills,
- 8) On-line marketing and Promotion skills.

Figure 1.2: InterCom Training Framework



Source: Own

1.2. Action Learning Approach

The Action Learning approach is based on delivering training which translates into actionable results, skills and methods. Action learning is

a dynamic process that involves a small group of people solving real problems, while at the same time focusing on what they are learning and how their learning can benefit each group member, the group itself and the organization as a whole. (Marquardt, 2004)

InterCom will deliver practitioner-oriented action learning modules into Learning Management Platform to the clusters in Poland and Lithuania:

The Group Training Session will deliver the core methodological outlines, specific tools, and case studies on how these are implemented in practise. The Cluster Training Sessions

will be dedicated to the specific requirements of each cluster, adapting the materials introduced in the Group Training Session as needed.

1.3. Action Planning

The output of each Action Learning module will be focused on three main issues, being the leading themes of the InterCom project:

- Strategic planning process for internationalisation of the cluster,
- Online promotion,
- Commercialisation of services rendered to members.

Strategic Plan written for each cluster will have a specific plan for the specific areas outlined. Taken as a whole, the plans will inter-react and drive each other, contributing to the overall success of cluster operations and activities.

We expect that these plans will transform the way each cluster operates. From what we have seen at present, the following general issues in cluster operations exist:

Commercialisation:

Resources have largely been allocated by government and EU funds; only in one case observed in Lithuania is resource shortage an issue, and this is because one government funded programme is at an end. As a result, many clusters are operating without a specific exit strategy or pressure to meet specific performance targets. A secondary result is that some operations are implemented because of the availability of funding, not because of true market need.

Formal decision-making and target-setting appears limited or constrained to simple activities, such as “participate in 3 international trade fairs”. The wider strategic role of the cluster on employment, value-added, exports, and innovation appears either limited, or theoretical. In many cases, clusters have implemented plans as part of their funding application process, but these have remained on paper rather than in practise.

Criteria for portfolio company entry and exit do not appear to be clearly defined in the case of some clusters or incubators. In many cases, this was implemented on a “first-come, first serve” basis. In other cases, clusters (or incubators) appear to have taken on members because it was a precondition of external funding, not because of a particular development objective or strategic imperative. This drives two results:

- a) Getting decisions made becomes increasingly difficult,
- b) There is no performance objective to motivate and energise staff.

Internationalisation:

This situation drives a related one: that cluster members may no longer be certain why they are members, or may be waiting for the cluster management to take the initiative to propose value-adding activities. In some cases, the portfolio companies may be disengaging from general involvement. In one case, the opposite is occurring: the cluster has defined a very ambitious programme to merge central functions such as marketing or trade fair representation.

In some cases, there is no specific understanding of competitive advantage for being a cluster member, or for the cluster itself. In one case, we were surprised to learn that manufacturing is possible (at least as practised by one incubator) in the same space where office/management operations take place. Such a practise is entirely impossible under French, British, Germany, or Swedish labour laws, and therefore could constitute a major competitive advantage had it been recognised and marketed. This general lack of understanding, or lack of a marketing approach, makes it difficult to explain to international partners what the unique selling factor or benefit would be of a cooperation.

1.4. Pilot Testing

The plans developed under the Action Learning and Action Planning modules will be ready within 1-2 months of each initial training session. As such, they are designed to be implemented, which means that they can be pilot-tested with the support of the InterCom consortium.

The pilot testing involves the following process:

- Structured implementation of the plans,
- Regular feedback with the consortium partners and wider testing groups,
- Adjustment and adaptation of methods and plans developed on Learning Management Platform.

A key part of action learning is reflection and evaluation of the training and other developmental activities implemented. This will be provided for by the group training sessions, the one-to-one cluster sessions and the remote support and other activities offered by the InterCom consortium and Navigator Consulting.

1.5. The Learning Management Platforms¹

The Learning Management Platforms (one designed for Lithuania and one for Poland) with the aid of external software developers will be designed to provide the below listed functionality:

- Provide basic information about the project,
- Communicate project and topic related news,
- Serve as a library of training courses (including but not limited to training materials generated for the project),
- Provide multiple choice quizzes or questionnaires allowing visitors to self-assess their knowledge of the topic and to evaluate the level of acquisition of knowledge in specific topic,
- Provide a possibility to communicate with mentor directly from the platform,
- Provide with the possibility tailor the training courses to individual needs of the registered users, track their performance using direct and indirect means (time spent on particular quizzes or repeated review of certain topics),
- Provide with the possibility to assign individual courses or topics based on the insights generated from the results and performance of diagnostic tests.

¹ Derived from the Functional specification of InterCom Learning management Platform

It should help achieving the following goals:

- To act as a hub where cluster managers and general audience could seek for a specialized information, were able to evaluate their knowledge and diagnose the needs of their organizations to develop further skills and capabilities, receive online training and consultancy support in an effective and modern way allowing to combine these processes with their daily activities,
- To help trainers, researchers and consultants offer their knowledge and support to the targeted audience, to help building and maintaining relationship with prospect clients across the borders and markets,
- To help organizers and managers of the InterCom project spreading the purpose developed materials to the target audiences, organize trainings and provide consultations to the clusters helping to achieve project related tasks and obligations.

Free access, Users zone

To identify the users allowing them viewing specific contents, the platform will be divided into two zones: the one available to all users and the other available only to registered ones, both of them distinguished by different contents and functionality. The platform allows registered users saving their preferences, the selected courses or materials, track the progress of reviewing specific contents (e.g. - remember position in the presentation or number of watched video clips in a sequence), save results of quizzes, questionnaires or surveys allowing tracking the progress and comparing the results. The user profile should allow communicate directly between a member and the trainer/consultant, as well as between the members, groups of members.

Content Management

The contents on the platform should be grouped into the following groups:

- Training courses,
- Training papers,
- Passive presentations,
- Consultancy sessions.

For the start of the platform, three courses will be uploaded to the server:

- Introduction to Project Management Principles and Practices,
- The Role of Communication in Running a Successful Business Cluster,
- E-marketing for Business Clusters.

As the Platform develops, more courses can be uploaded to the platform, including those coming not from Consortium's trainers.

Different type of contents shall be coded for search optimization, automatic grouping and display as well as visually coded for easier representation and selection.

Regardless of the type, all contents should be presented in modules allowing different media and tools to be used to achieve module specific goals (the module can include training videos, presentations, documents for background reading, quizzes, evaluation tests etc., the elements of every module should be possible to arrange in a specific sequence, the communication tools should allow engaging into a discussion or joint work with the consultant/trainer, or other users of the platform without leaving the module. The communication within module should be easily identifiable as related to specific module of contents. The modules should be listed in a home page, topic subpage or a home screen of a logged in user as list, tiles, can contain graphics and annotations allowing users selecting the modules they are interested in. the modules should be possible to search according to different search criteria (topic, author, institution or tag) as well as picked by an automated selection system (TBA at later stages).

Communication tools

The LMP should allow users and consultants/instructors communicate with each other (individually or in groups) in the form of instant messages via the plugin of Skype chat.

The LMP shall allow shared work between assigned users of the system and/or consultants by using plugins of Google documents. The platform should ideally use the third party resources for jointly edited documents linked to the users account of the instructor.

The LMP will be designed using the open architecture allowing adding or replacing certain topics of the system to allow in future:

- Real time communication module (chat, voice call shared white board, real time questionnaires etc.),
- Diagnostic tools,
- E-shop module allowing distribution of materials of restricted use or protected by copyright law.

Automated tools

The LMP shall have a possibility to be expanded with automated data processing tools, allowing automated review of quizzes, surveys or users requests. The tools shall be developed at a later stage and are not part of this project.

The pilot version of the LMP should be ready for start of evaluation in the Q3, 2015.

The Pilot Testing will supported by an evaluation, whereby external partners will be asked to comment on the process in November-December 2015.

1.6. Remote Support

In addition to the personal engagement of the consultants during the Action Learning and Planning sessions, Navigator Consulting will support the clusters via remote support. This comprises coaching, mentoring and responses to specific questions delivered via email, Skype and telephone as needed.

2. The Trainees Groups selection

2.1. Trainee user groups – definition of the Candidate Profile

For the purposes of the InterCom project, one need to focus on competencies of managers of networks of all kinds: business networks, clusters, professional associations and business incubators. These managers have been drawn from different groups in Poland and Lithuania, and as such have very different backgrounds and levels of professional achievement.

The initial list of sectors that the project was supposed to concentrate on, included:

- Information and Communications Technology,
- Tourism,
- Education,
- Food Processing,
- Furniture.

Experience

The InterCom project candidates were by professional managers employed by Chambers of Commerce & Industry, Sectorial Clusters, Professional Associations, Regional Development Associations, University-Industry Incubators, or similar organisations. They had the following general profile:

- Minimum 1, preferably 5 years' experience in working in a professional role relating to managing or operating a network, cluster or other sectorial association,
- A real exposure to and credibility within companies, entrepreneurs, managers or start-ups within that specific organisation,
- A real functional or sectorial expertise. In terms of functions, this could include areas such as business planning, budgeting, preparing and managing events, public relations, marketing, export development, quality management, etc.,

- A higher education degree has been a preferred, but not essential, credential. Candidates may also have vocational or professional certifications which can be equally valuable.

Knowledge

The InterCom project needs to identify candidates who had real knowledge about their specific sectors and regions. This knowledge is defined as:

- Specific work-based, practitioner knowledge, as opposed to theoretical knowledge. The candidates must come from an operating environment,
- Business and sectorial knowledge: understanding of how businesses and sectorial organisations work in practise,
- International knowledge where possible: understanding of and experience with internationalisation, e.g. through export development, attracting foreign direct investment, organising international delegations or trade fairs, marketing, etc.,
- Project knowledge: demonstrated experience in achieving real results.

Competencies

Competencies are a mix of skills, experience and knowledge which demonstrate superior performance in a specific role or function. As such, one can define competencies as being both an attribute of a person, as well as an outcome or a result of a given work situation.

We can distinguish between two levels of competencies:

- **Threshold competencies** are those actions and processes that you must be good at just to be considered as a potential supplier to a customer. If these are not satisfied, you will not even get a chance to be considered by the buyer. These are “the order qualifiers”.
- **Core competencies** are things that you are able to do that are very difficult for your competitors to emulate. They form the basis for competitive advantage and they are referred to by Johnson & Scholes as “the order winners”.

In their key 1990 paper "**The Core Competence of the Corporation**," C. K. Prahalad and Gary Hamel argue that "Core Competences" are some of the most important sources of

uniqueness: these are the things that a company can do uniquely well, and that no-one else can copy quickly enough to affect competition.

Hamel and Prahalad give three tests to see whether they are true core competences:

1. **Relevance** – The competence must give your customer something that strongly influences him or her to choose your product or service. If it does not, then it has no effect on your competitive position and is not a core competence.
2. **Difficulty of imitation** – The core competence should be difficult to imitate. This allows you to provide products that are better than those of your competition. And because you're continually working to improve these skills, means that you can sustain its competitive position.
3. **Breadth of application** – It should be something that opens up a good number of potential markets. If it only opens up a few small, niche markets, then success in these markets will not be enough to sustain significant growth.

If certain skill is considered as a core competency, but at the same time employees of the competitors have equivalent expertise, then this is not a core competency.

Examples of core competencies as far as clusters are concerned, are:

- Sophisticated IT that, for example, enables complex and accurate demand forecasting, searching a market, online marketing,
- Communication and corporate culture that fosters innovation,
- The ability to share and lever knowledge throughout the organisation.

The following skills were the subject of special interest:

- Strategic and functional analysis,
- Strategic planning, e.g. forecasting, business planning, organisational development, etc.,
- Economic and/or financial analysis,
- Specific functional expertise (e.g. marketing, sales, HR, business incubation, etc.),
- Project planning and management,
- Communications skills,
- Teamwork and accountability skills,
- Computer skills.

2.2. Analysis of Trainees' needs

Analysis of the trainees needs was the preceding step for the methodology of the training. It was carried out in the first phase of the projects, ending in Autumn 2014. There have been some general conclusion drawn from the survey and associated interviews with cluster representatives:

Internationalisation is a Long-Term Process

Most cluster project managers are focused on short-term priorities, typically revolving around specific project initiatives associated with the funding grant on which their cluster is based. These initiatives tend to be ad-hoc, not strategic, and determined by the availability of funding. Thus, initiatives include:

- Attending international trade fairs,
- Commissioning market research on international market segments,
- Translating or adapting their promotional material into foreign languages,

There is need for a strategic, longer-term approach towards internationalisation which is not linked to a specific project initiative, but to an outcome.

Internationalisation is done at Varying Speeds and Commitment Levels

Most clusters are using a single project approach, focusing on specific projects, and assuming that all cluster members are equally ready to internationalise. We can infer from experience that this cannot be the case. Some cluster members will already be more international than others, and have the capability to expand still further. Others will not. Particularly micro-enterprises may have limited resources and limited management capacity to internationalise over time. It will be important to review how cluster managers are defining firm-specific approaches to internationalisation in their firms.

Internationalisation is Multi-faceted

The full range of internationalisation includes a range of initiatives, including IP protection; joint R&D; subcontracting; alliances; full market entry, etc. It is also a two-way process: it involves the export of goods and services, as well as their import. The initiatives mentioned until now tend to be superficial, one-time events or efforts. Greater information and awareness will be required.

Commercialisation is Relatively Unknown

The range of commercialisation initiatives remains very limited. Cluster managers feel constrained from developing initiatives which seek additional income from members. The same problem as with internationalisation exists: not all members are willing to pay for additional cluster services. The process of creating trust and coherence between cluster members is extremely important.

Economies of Scale are Necessary

Most clusters have a low number of members, and have often been drawn together due to public finance initiatives. It is extremely important that clusters grow, so that they can gain the economies of scale to undertake meaningful, long-term initiatives.

Training Requirements

The used in process self-assessment questionnaires was designed to help to understand clusters manager assessment of competencies and priorities in managing internationalisation and commercialisation of business clusters and networks. According to survey's results, there is a demand for practitioner, results-oriented training in fields such as: (1 – highest deficits, 5 – lowest deficits):

1. Online Marketing & Promotion 2.35,
2. Budgeting and Price Analysis 3.1,

3. Marketing and Promotion 3.25,
4. Negotiation 3.7,
5. Project Funding Applications Skills 3.92,
6. Project management 4.23,
7. International Project Cooperation 4.33,
8. Communication skills 4.45.

3. The training structure

3.1. The objectives of the training

The plans developed under InterCom therefore have multiple learning and developmental objectives:

- a) They will support the professional development of the specific sector/function managers involved in the process. This is a learning objective,
- b) They will support the development objective of the specific sector/function for which they are intended. This is a developmental objective,
- c) They will develop consensus and drive engagement between the cluster manager and the portfolio companies. This is a learning and developmental objective,
- d) They will provide an effective process for management which can be replicated and adapted to the clusters as well as their portfolio companies,
- e) They will reveal unexpected collateral benefits and options for the cluster, while at the same time developing a “return-on-investment” (ROI) approach, which will hopefully make future public sector initiatives in this area more effective.

3.2. Agenda of the Kaunas training

The first session takes place in Kaunas on October 2014. This training will introduce the participating clusters and the project objectives, and focus on four key areas: internationalisation, online marketing, negotiation skills and international project cooperation.

The First Day

09:00 – 09:15 Welcome and Introduction

Aleksandra Cicha, Wielkopolska Chamber of Commerce & Industry

Overview and objectives of the InterCom project

09:15 – 09:30 Introduction of the Participating Business Clusters

09:30 – 11:00 **Internationalisation of Business Clusters**

Philip Ammerman, Navigator Consulting Partners

Overview of internationalisation strategies and priorities for business clusters

11:00 – 11:15 Coffee Break

11:15 – 12:45 **Internationalisation of Business Clusters (continued)**

12:45 – 13:45 Lunch Break

13:45 – 15:15 **International Project Applications and Management**

Maciej Pietrzykowski, Foundation Partners for Local Government

15:15 – 16:00 Coffee Break

16:00 – 17:00 **International Project Applications and Management (continued)**

17:00 – 17:15 Conclusions and Closing

The Second Day

09:00 – 11:00 **Online Promotion of Business Clusters**

Philip Ammerman, Navigator Consulting Partners

- Strategic analysis and structure of online promotion
- Developing information-rich websites
- Developing news, articles and press releases
- Contact databases, newsletter and mailing campaigns

11:00 – 11:15 Coffee Break

11:15 – 12:15 **Online Promotion of Business Clusters (continued)**

12:15 – 13:15 Lunch Break

13:15 – 15:15 **Negotiation Skills and Strategies**

Sarunas Pundzius, Human Capital Research & Development Institute

15:15 – 15:45 Coffee Break

15:45 – 16:45 **Negotiation Skills and Strategies (continued)**

16:45 – 17:00 Conclusions and Closing

17:00 – 19:00 Visit to a Lithuanian Cluster

3.3. Agenda of the Poznań training

The second session of the InterCom project shall take place in Poznan, Poland, on April-May. This session shall be dedicated to four subjects: 1. Internationalisation; 2. Budgeting and Finance; 3. International Project Management; 4. Communications Skills.

The First Day

09:30 - 12:30: Internationalisation of Business Clusters

Trainer: Philip Ammerman

- Determining internationalisation strategy,
- Legal forms of international cooperation,
- Selecting target markets and counterparties,
- Scheduling activities,
- Gaining resources and cluster member commitment,
- Measuring return on investment.

12:30 – 13:30 Lunch Break

13:30 – 16:30: Financial Management for Business Clusters

Trainer: Philip Ammerman

- Determining Financial Strategy,
- Developing an Annual Budget,
- Activities-Based Budgeting,
- Calculating Break-Even per Strategic Initiative,
- Calculating Break-Even Contribution per Cluster Member,
- Accessing External Financial Resources,
- Measuring Return on Investment,

16:30 – 17:00 Discussion and Closing

The Second Day

09:30 - 12:30: International Project Management

Trainer: Maciej Pietrzykowski

- Principles of International Project Management,
- Partner Selection and Contracting,
- Project Planning,
- Planning Tools, Scheduling and Milestones,
- Project Budgeting,
- Risk Management,
- Measuring Return on Investment.

12:30 – 13:30 Lunch Break

13:30 – 16:30: Communication Skills

Trainer: Sarunas Pundzius

- Communicating in an International Environment,
- Email Writing Techniques,
- Letter Writing Techniques,

- Presentation Techniques,
- Verbal Presentation Techniques.

16:30 – 17:00 Discussion and Closing

3.4. Training material Production

Initial training materials (for training session in Kaunas and Poznan) shall include a training booklet and training programmes. Specific material foreseen for a some modules will be defined together with the definition of modules. There will be a variety of teaching methods and documentation required for efficient delivery of the event itself. The main aim of the training development task is to develop these methodologies in order to ensure a high quality of training materials. The key materials include:

- Agenda and course programme template – it ensures that each course follows a similar structure and concentrates on key topics of the InterCom projects,
- PowerPoint presentation – no matter of which teaching methods are going to be engaged in the training, using presentation and traditional lecturing is inevitable; a structured template for the presentation is essential,
- Presentation abstracts – each trainer shall produce a short abstract outlining the purpose and the content of own session,
- Worksheets – a variety of worksheets will be required to support training exercises, such as example scenarios, questions or handouts on key principles.

The booklet and training materials shall be delivered to trainees a week before the training at least. All trainers have to deliver the required materials respectively earlier.

The materials for the Learning Management Platform is quite different issue (see 1.5. section).

3.5. Trainers

The InterCom trainers have a vast experience on consulting and education. The profiles of Trainers are presented below:

Philip Ammerman, UK

Managing Partner Navigator Consulting Group



Philip co-founded Navigator Consulting Group in 1995 and has led the company since then.

Philip's expertise is in the areas of corporate analysis, due diligence and strategic business planning. He has worked in the emerging markets of the former Soviet Union and the Middle East since 1992, and has participated in or led over 120 major investment projects delivering over EUR 6 billion in invested resources.

In addition to investment advisory, Philip has extensive experience in post-investment support, including corporate restructuring, lean management, performance-based management and marketing and sales restructuring. In this capacity, he has advised a number of business clusters, enterprise networks and chambers of commerce on areas such as sectoral marketing and investment promotion, internationalisation and commercialisation of key business services.

Philip is co-founder and managing partner of ECN Business Intelligence Ltd., an online business intelligence and professional networking service for companies and institutions working on EU-funded procurement. He is Managing Director of MICE and More Ltd., a leading destination management company (DMC).

He has worked with business clusters and networks in Poland and Lithuania between 2012-2014 under the Strengthening of Business Performance in Economic Networks (SeBPEN) project, during which he delivered action learning-based training in strategic management, financial management, online marketing, internationalisation and commercialisation. He also authored a Management Tool Kit for business clusters.

Philip earned an AB in Geological and Geophysical Sciences and a Certificate in African Studies from Princeton University in 1994, and a Certificate in Human Resources Studies from Cornell University, Institute of Industrial and Labour Relations. He is a prolific writer and has been interviewed by BBC, Al Jazeera, CNBC, National Public Radio, and Channel 4, while his articles have been published across a range of media.

Maciej Pietrzykowski, PhD, Poland

The Foundation Partners for Local Government



Assistant Professor at the Poznań University of Economics at the Department of International Competitiveness. Vice-president of the Wielkopolski Cluster Association and member of the board at the Foundation “Partners for local government”. Owner of a company hiring construction equipment. An Alumni of the governmental program TOP 500 Innovators and the Hass School of Business at the University of Berkeley. Areas of scientific specialisation are entrepreneurship, innovation, knowledge and technology commercialization, cluster policy, as well as regional and local development planning.

Since 1999 lecturer in the areas of Strategic Management, International Entrepreneurship, Project Management, Structural Funds, International Economics, Economic Policy, and the EU Economy. In the years 2010-2012, lecturer and researcher at the University of Lethbridge (Canada) and University of Pula (Croatia).

Asta Pundziene, PhD, Lithuania

Human Capital and Research Development Institute



Asta Pundziene gained her doctorate in Social Sciences (organizational psychology) at Vytautas Magnus University, Kaunas, Lithuania. Since 1997, she has developed her academic competence at Amsterdam Free University, The Netherlands; Uppsala University, Sweden; Heidelberg University, Germany and Sheffield University, UK. Harvard Business School, USA, etc. She began her career was at Vytautas Magnus University in 1993 as Administrator of the Pedagogical studies programmes becoming Project Manager in the Centre for Vocational Education and Research at the same university in 1996.

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Sarunas Pundzius, Lithuania

Human Capital and Research Development Institute



Sarunas has studied Philosophy and Business administration in Vytautas Magnus University in Kaunas, Human Resource Management in Mediterranean Institute of Management in Cyprus and International Marketing Management in ISM University of Management and Economics. He has spent 10 years in Lithuanian mass media working as journalist and editor in business and technology publications, moving to PR and Corporate Communication consultancy in 2006.

Since 2006 he has been running operations of a major international communication agency "Grayling" in the Baltic States overseeing and coordinating Lithuanian and Pan-Baltic accounts for Google, Nortel Networks, Mars Inc., GE, Philips, Schering-Plough, GSK, Wizz Air, DHL, Sharp and many other leading international businesses by providing strategic advice and support in various fields of communication: Corporate and Product Public Relations, Marketing communication, Public Affairs, Event Management and CSR. Sarunas has been providing numerous in house trainings for business executives as well as communication and marketing professionals across Lithuania, Latvia and Estonia.

4. Evaluation Plan and success indicators

4.1. Implementation of a gap analysis

A gap analysis compares the current competencies to the planned situation, as expressed through individual motivations and objectives of the trainees, the cluster strategy, the training methodology general business development conditions. The success of a gap analysis will depend on:

- The extent to which a trainer or consultant is able to accurately diagnose the level of skills of particular trainee,
- The extent to which the coordinators (Trainees) will be able to realistically and accurately describe their business objectives, strategies and specific business plans for the cluster,
- The degree of success in implementing these plans, taking into account external factors such as competition, pricing, inflation, terms of credit, changes in distribution structures, product life cycles, and similar issues,

There are always two components to the gap analysis:

- *Training needs*, which comprise clearly-identifiable training requirements, either through in-company training, external training, etc.,
- *Non-training needs*, which include a wide variety of inputs, including human resources development in the form of the design of incentive systems, compensation systems, etc., organisational development inputs such as recruitment or addition or business functions and staff position, etc.

Training requirements may be significantly affected by cluster non-training needs. For instance, a cluster that is not compensating its coordinators appropriate to market standards and to their performance cannot expect training to solve all issues relating to efficiency or productivity. Similarly, if an organisational position or business process does not exist or is not adequately resourced, no amount of training will solve the problem. Depending on the terms of reference of a specific project, it may be important to document non-training needs to ensure that a potential management or cooperation development project does not occur within an organisational vacuum and results in failure.

While considering the implementation a gap analysis, it is usually necessary to delineate between three hierarchical levels:

- The macroeconomic level, comprising rules for the economy as a whole, cluster policies, innovation, EU funding, etc.,
- The corporate level, affecting the human resources policies, cluster's strategy, vision, mission and goals,
- The individual level, including individual or personal training needs, requirements and performance.

Each level will affect the form and content of a training programme.

4.2. Evaluation form

An assessment questionnaire based on multiple choice questions will be developed, in order to evaluate the level of acquired knowledge through the course and the overall trainees' capacity. The assessment will take place during the last session of the training. The training feedback form has been presented in the Annex of this document.

4.3. Success indicators

Training success indicators have been established to measure the performance of trainers. They have been presented in table 4.1.

Table 4.1. Success indicators

Tool	Success indicators	Coverage
Number of training participants per session	>75% of all recruited coordinators	Agreeing on the training date 3 months earlier Reminding on the training date 2 weeks ago
Successful completion of all training phases	>60% of all recruited coordinators	Delivering on-line training while required
Suitable approach towards	>75% of trainees prepared	Sending materials 1 week

training	for the training	before the training Reminding the necessity of preparation by the projects manager
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Source: Own

5. Calendar and duration

5.1. The Gantt chart

The process of delivery the training is time-consuming. The first step were recruitment of the trainees and analysis of the competencies. Some preparations for the training have started together with the recruitment process. Schedule of the analysis was as follows:

Table 5.1. The training schedule

Stages of the trainings delivery/months	2014										2015											
	IV	V	VI	VII	VIII	IX	X	XI	XII		I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII
1. Analysis of managerial competencies		■	■	■																		
2. The training methodology					■	■	■															
3. The Action Learning Kaunas							■	■														
4. The Action Planning - internationalisation							■	■														
5. The Action Learning Poznan														■	■							
6. The Action Planning - commercialisation																		■	■			
7. Remote assistance							■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
8. Testing phase																			■	■		
9. Revising strategic plans																				■	■	
10. Delivering the content for Learning Management Platform											■	■	■	■	■	■	■	■	■			
11. Evaluation																				■	■	■

Source: Own

5.2. The Action Learning

The exact dates of the training courses will be decided according to mutual engagements and organisational time, however they will take place in the period between October 2014 and May 2015.

The foreseen duration for each training is 2-3 days, with additional availability of remote assistance in the following months and periodical review by mail. The language chosen for the carrying out of the training modules is English.

5.3. The Action Planning

The individual sessions with clusters' representatives are required to prepare strategic plans on internationalisation and commercialization of cluster activities. The UK expert will spend one day (in some cases a half of the day) with each cluster separately to work on strategy. The first phase of meetings is foreseen to take a place in the Autumn 2014, the second in August-September 2015. The first part will be devoted to internationalisation topic, the second to commercialization.

5.4. The remote assistance

The remote assistance and by mail consulting will be possible the whole project lifespan, but the most required consultation are expected to take a place between October 2014 and November 2015. The experts will be available on-line to deliver the required assistance. The expected time of responding has been established for max 3 days.

5.5. The testing and revising phases

From August 2015 the testing phase starts. The deliberately chosen and gathered group of experts will test the whole materials and tools prepared for the training delivery.

September and October have been planned for the tests, then comes time for revising the content.

5.6. The Learning Management Content

All training materials will be restructured to be used for distant learning and uploaded to the Learning Management Platform. The work on the content starts in early months of 2015 getting to the successful end with the end of the project.

6. Training promotion

A section of Projects website shall be dedicated to training activities in order to inform interested parties on relevant information pertaining to developments within the training programme. The special communicate shall be sent to all parties informing on upcoming event.

Since the group of trainees was deliberately chosen, no further action have been planned to promote participation in the training, as far as Action Learning and Action Planning modules are concerned.

With regards to the Learning Management Platforms and the content they will include, the numerous promotion actions have been planned:

- 1) Promotion at the Partners' websites,
- 2) Newsletter sent to all clusters in Poland, Lithuania and neighboured countries, chamber of commerce, other relevant organisations,
- 3) Promotion at the clusters workshops taking place in Poland and Lithuania in Autumn 2015,
- 4) Promotion at the final conference that takes place in Autumn 2015,
- 5) Leaflets at various events referring to cluster policy , that take place in both countries (the list of events shall be updated as they occur).

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9. References

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Annex I. The training feedback form

**Leonardo da Vinci Transfer of Innovation
Internationalisation and Commercialisation for Business Clusters and Networks
(InterCom) 2013-1-PL1-LEO05-38152**

TRAINING FEEDBACK FORM

Kaunas, Poznań

This feedback form is intended for evaluation of the training delivered in
We would be grateful, if you could provide us with your opinion. Please mark the appropriate answer by circle (O) appropriate answer and express your opinion in the empty below.

1. How would you evaluate your overall satisfaction of this training?

Very satisfied	5	4	3	2	1	Not satisfied at all
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2. How would you evaluate value of this training? Was it appropriate for your training needs?

Training was very valuable	5	4	3	2	1	Not valuable at all
Detailed enough	5	4	3	2	1	Too general
Topical	5	4	3	2	1	Not topical at all
Coherent and logical	5	4	3	2	1	Fragmented

3. How would you evaluate quality of this training?

Content quality was perfect	5	4	3	2	1	Content quality was poor
Lecturers did pay attention to the needs of participants	5	4	3	2	1	Lecturers did not pay attention to the needs of participants
Participation was encouraged	5	4	3	2	1	Participation was not encouraged
Lecturers presentation skills were very good	5	4	3	2	1	Lecturers presentation skills were poor
Lecturers had a very deep content knowledge	5	4	3	2	1	Lecturers had insufficient content knowledge

4. What would you suggest to improve?

5. How would you evaluate organizational side of the training?

The length of the training was appropriate	5	4	3	2	1	The length of the training was not appropriate
The place of the training was appropriate	5	4	3	2	1	The place of the training was not appropriate
Information received before training was sufficient	5	4	3	2	1	Information received before training was not sufficient

6. Your comments:

THANK YOU!