



**PECOS
4SMEs**

PERSONALIZED TRAINING
ON CROSS BORDER
e-COMMERCE

PECOS4SMEs

D3.1 Training Methodology for SMEs

WP3

Version 1.0 – 08/11/2013

Project	PECOS4SMEs		
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**Lifelong
Learning
Programme**

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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 D3.1 Training Methodology for SMEs 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 information regarding the structure of the PECOS4SMEs training programme.

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Document Glossary

Term	Description
B2B	Business to Business
B2C	Business to Consumer
CRM	Customer Relationship Management
ERP	Enterprise Resource Planning
IT	Information Technology
LN	Learning Need
SEM	Search Engine Marketing
SEO	Search Engine Optimisation
SME	Small Medium Enterprise
SMS	Short Message Service
WP	Work Package

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1. Introduction

1.1. Purpose of the D3.1 Training Methodology for SMEs

The purposes of the current D3.1 Training Methodology for SMEs are the following:

- To describe the components of training programme addressed to SMEs
- To propose a training methodology on the subject of e-Commerce.

The current report will set out the structure, content, methodology, delivery approach and all relevant aspects of the PECOS4SMEs vocational training system. The training methodology will describe the complete process facilitated by PECOS4SMEs.

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. Training Methodology for SMEs

The current report will set out the structure, content, methodology, delivery approach and all relevant aspects of the PECOS4SMEs vocational training system. The training methodology will describe the complete process facilitated by PECOS4SMEs.

The training process for the SME will begin by accessing the platform which will visually introduce (video) the SME to the basic concepts of e-Commerce and the potential of cross-border e-Commerce while depicting the most important pre-requisites to succeed in cross-border e-Commerce.

The SME will then invoke the e-Commerce strategy Genie will guide the SME to the data entry process for the provision of the necessary data for the SME as a person (age, languages, skills, ICT competence level, etc.) but also for its business (sector, location, infrastructure, current practices, etc.)

The process will start by an evaluation of the SMEs current practices with regards to e-Commerce and the provision of what the SMEs e-Commerce practices could have been. Then, a detailed report will follow comprising all the actions that the SME can implement in order to realise its e-Commerce potential.

2.1. Relevant Stakeholders

Table 1: Relevant Stakeholders

Role	Responsibilities
Training Department Director	<ul style="list-style-type: none"> Identify skills, knowledge and trainings needed by SMEs in e-Commerce; Consolidate training needs; Create training plan for the organisation; Create annual training plan; Continuously evaluate and adjust the annual training plan.
Training Delivery Director	<ul style="list-style-type: none"> Identify skills, knowledge and trainings needed by the SMEs in e-Commerce; Create training plan for the Delivery Group; Update training plan for the Delivery Group.
Quality Manager	<ul style="list-style-type: none"> Review in terms of quality of all deliverables and activities to ensure that all quality criteria are respected and the objectives of the training service are achieved; Maintain and update the library that includes the training deliverables (i.e. Trainer’s Guide, Trainee’s Guide, Training Course Evaluation Assessment Form, Training Evaluation Report); Monitoring the results gained from the trainee’s and applying any corrections or improvements in the process.
Trainer	<ul style="list-style-type: none"> Respect and follow predefined standards and procedures Maintain your content expertise by being knowledgeable about

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	<p>the research, current practices, and future trends regarding the topic(s) you train</p> <ul style="list-style-type: none"> • Know how to find, critically evaluate, and incorporate research into your workshop as appropriate • Be aware of copyright law and do not use materials in workshops that violate copyright law • Be actively involved in the process of becoming culturally competent and develop the knowledge and skills to include relevant cultural concepts in their training workshops
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2.2. Phases of PECOS4SMEs Training Methodology

A training strategy should leverage a blended approach for optimal results. Blended learning means a mix of different learning environments where methods, techniques and/or resources are combined. A blended learning can combine ILT, video conferencing or virtual classroom and/or any other methodology. An appealing teaser with video, animation and/or sound to invite and motivate users, followed by any combination of ILT, e-learning is an example of blended learning.

Practical access to resources: Training and documentation usually consist in planning, implementing and evaluating.

User documentation usage normally foresees self help / peer assistance (online manuals, FAQs, IVR and forums) on Portals.

Elaboration of the support materials: Documentation and training, take fully part in the digitalisation process supported by the business. Writers can therefore draft documentation alongside developers to integrate as much information into the interface as possible (embedded user assistance). In order to improve quality, ISO/IEC 26514:2008 specifies the structure, content, and format for documentation, and also provides informative guidance for documentation style. It is independent of the tools that may be used to produce documentation, and applies to both printed documentation and on-screen documentation. Furthermore, IMAP® (information mapping) consists in a systematic process for analysing and re-engineering information to identify what the reader needs to do and needs to know (as opposed to nice to know). The objective is to reach a standard presentation throughout all documentation, to obtain modular document and, therefore, reusable components.

As in every training methodology we can identify the following distinct steps:

a) Identification of Training Requirements

Upon the commencement of the training process, the first task that will be performed will be a definition of the training requirements by analysing the scope of training and the target audience profile. It should be noted that training requirements will be usually defined in the context of skills management or continuous improvements activities.

b) Production of a Training Plan

Based on the requirements that will be identified in the context of the aforementioned task, a training plan will be produced that will comprise:

- The training courses will be conducted in accordance to the training plan. Training programs will be conducted allowing the trainees to participate actively in the programme,

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express their questions, express their preferences in the topics that they would like to be trained, etc. Hands-on training or tests to the reference environment may be also performed.

- A description of the training programme.
- A description of the training material and associated documentation that will have to be produced.
- The specification of scenarios that will be used in the PECOS4SMEs tool.
- A time-schedule for training.
- Training evaluation form(s) to be used in the context of training evaluation activities.

c) **Training Execution**

The training will be conducted in accordance to the training plan. Training will be conducted allowing the trainees to participate actively in the programme, express their questions, express their preferences in the topics that they would like to be trained, etc. Hands-on training or tests to the reference environment may be also performed. Additional, each trainee will execute the pre-defined scenarios in the PECOS4SMEs Genie.

d) **Training Evaluation**

At the end of each training, each trainee will be asked to complete the evaluation form, aiming at the elicitation of information regarding the confidence that trainees have in their skills obtained through the programme. The answers provided in the evaluation forms when processed, along with the evaluation results of the training environment, may result in the determination of further training requirements that will have to be satisfied by organising additional training sessions.

2.3. Structure of PECOS4SMEs Training System

Delivery platform details

The delivery platform will comprise 2 layers facilitated inside the Moodle platform. The SMEs will need to provide certain input in layer 1 to be used by the Genie to personalise the training programme. Layer 1 will contain situational and behavioural questions such as the ones below:

1. To which sector does your (future) webshop belong?
2. Do you have your target group defined well?
3. If yes, does this target group constitute one solid group or does it encompass mutually exclusive subgroups?
4. If one solid group, does this apply cross-border too?
5. How would you/ do you conduct your marketing: rather bottom-up or rather top-down?
6. Does your product range present one solid whole or does it encompass mutually exclusive products?

All questions will be multiple choice questions and based on the responses the second layer will be customizable to the SME's needs.

Layer 2 will display the e-Commerce modules of PECOS4SMEs as filtered by sector (Q1) and ranked in importance through the answers to the other Layer 1 questions.

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The modules will be presented with the names of the actions that can be chosen. Each action will be accompanied by indicators (in symbols) of multiple categories

- Technical skills needed (low-medium-high)
- Webshop level (starting-established-well-developed)
- (Optionally) Language skills needed (low-medium-high)
- Action type (quick win-simple action-simple action requiring investment-action with prerequisite- action with prerequisite requiring investment)

All these action names, grouped under a module, will be clickable. When clicked an individual action will be opened. For certain actions, additional content will be necessary in which case the SME can invoke from the action the associated learning path in Moodle.

Usability - Accessibility

The results from the use of a mature eLearning platform are that the user will gain full understanding of the presented information having the same time full interactivity with it. Particular emphasis will be given to ensure that the system works as it should with any web browser technology.

Furthermore, for the facilitation of disabled people and in line with the requirements of the EU regulatory framework [Article 16 Regulation (EC) 1083/2006], the project may attempt to minimize barriers and increase accessibility to services and structures to vulnerable social groups. For that reason supportive technologies like text-to-speech may be evaluated and presentation of the text will exploit user agents that convert it into writing Braille (images and other multimedia content in every page will be described with equivalent texts).

The final document for assessment will include both the assessment methodology and the tools that will be used (e.g. Bobby, Cynthia Says, A-Prompt) in order to examine the compliance of the GUI with the Web Content Accessibility Guidelines - WCAG 2.0. The specifications of the GUI will be accompanied by design suggestion that comply with the latest.

e-Commerce Strategy Genie Functions

The strategy Genie is built around the "hardcoded" strategies of deliverable D3.3. In other words the Genie's purpose is to gather input from the SMEs, process the input in relation to the requirements for the implementation of the strategies elaborated in the context of D3.3 and produce as output a personalized training plan for SMEs to achieve these strategies in a step-wise approach.

To this end, data from layer 1 questions will be used to depict the "AS-IS" situation regarding the SME's strategies and its cross border e-Commerce aspirations in order to rank the e-Commerce modules of layer 2 and present them in order of importance to each SME. Then, SMEs start an interactive learning process by selecting modules and actions to implement. All actions comprise certain features, such as:

- Technical skills needed (low-medium-high)
- Webshop level (starting-established-well-developed)
- (Optionally) Language skills needed (low-medium-high)

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- Action type (quick win-simple action-simple action requiring investment-action with prerequisite- action with prerequisite requiring investment)

2.4. Delivery Approach

Trainees' interaction with the platform

Initially, the interaction of the SMEs' with the platform is guided. Through layer 1 questions, they are guided on how to provide the needed information to the tool in a structured manner.

It is worth considering to accompany the questions with additional information (for example the "I" icon could be next to each questions providing more information about what is required on mouse over).

Also, the introductory video for PECOS4SMEs focusing on what the SMEs are going to do with the training programme may be used initially as a "soft" introduction to the training programme.

Then, in layer 2, the interaction is initiated by the SME who will see the e-Commerce modules presented in order of importance and accept it by selecting actions from the first module or start selecting actions from other modules. Again the SME may provide input to the tool regarding actions already implemented in which case the SME marks them as completed and they disappear from the list of pending actions.

Invoking an action which is accompanied by additional content for its implementation may lead the SME to access a specific learning path in Moodle dealing with the implementation of the action. It could be that a specific action has a complete training course behind it.

Educational activities to take place during the training workshops

The current section may be elaborated later when the hands on exercises are organised and updated following the conclusions from the execution of the first hands on exercises.

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2.4.1. Process Planning for SME Training

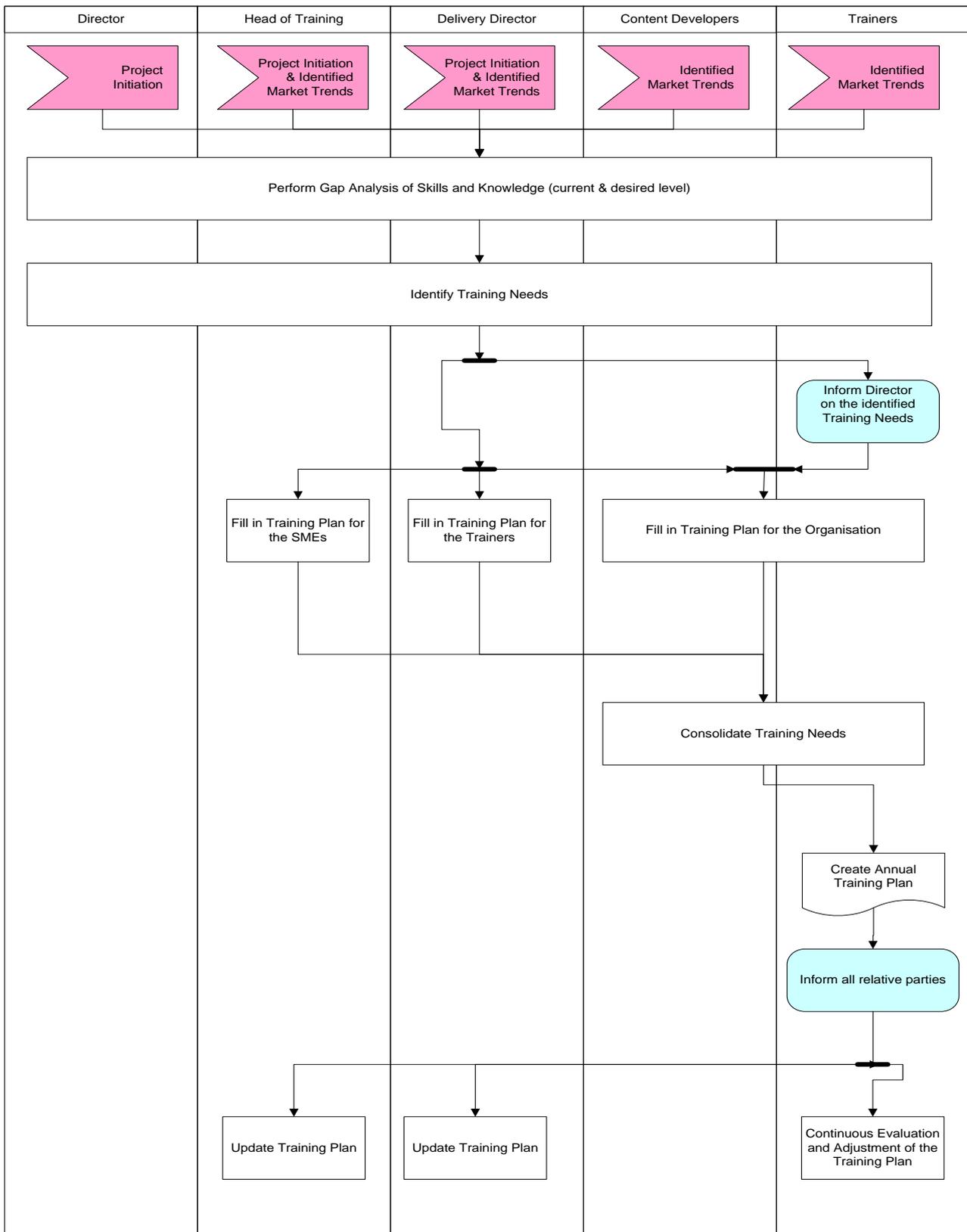


Figure 1 – SME training process planning

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2.4.2. Post Training Process Activities

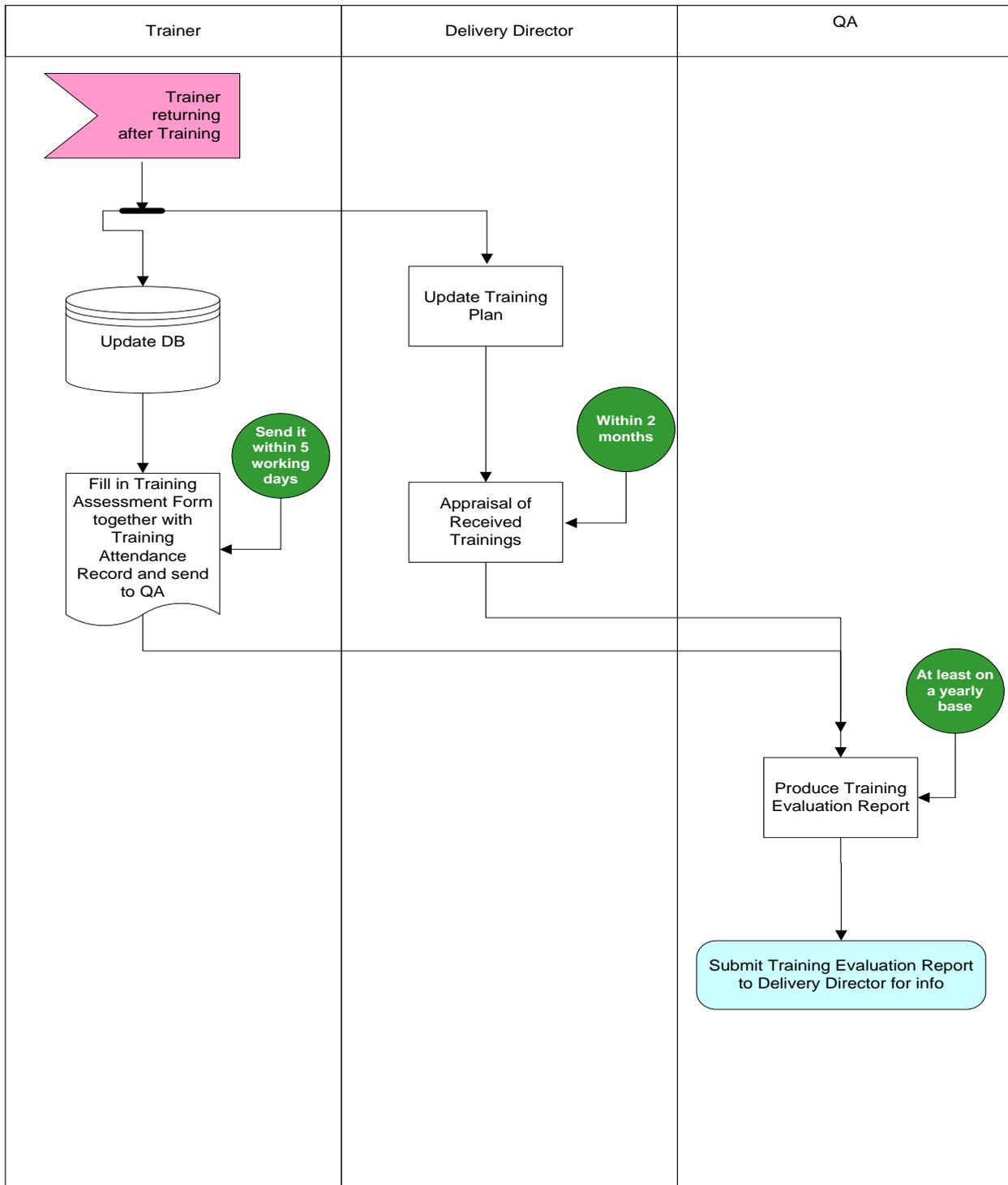


Figure 2 – Post training process activities

2.4.3. Inputs/Outputs

As input are considered:

- Planned/Unplanned needs for SME trainings;

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- Training subject provided.

As outputs are considered:

- Provision of trainings to the SMEs
- Training documentation (including training lesson plan, guide etc.);
- Feedback received by the trainees through the evaluation forms
- Feedback received by the trainers of the SMEs for the assessment of value gained from the trainings.

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3. Perspective and evolution

The tendencies already present on the Internet today, such as forums, discussions, wiki and blogs should also be the future of the supporting documentation and facilitating tools and of training strategy:

- **Real-time documentation:** Screen changes, new functionalities in the information systems which are updated in real-time in the documentation would certainly get the approval of trainees. DITA (Darwin Information Typing Architecture) contains rules for publishing DITA content in print, HTML, online Help and other formats. As an example, if element A contains a path to element B, the content of element B will be displayed in the location of element A.
- **Contextual documentation:** Trainees will appreciate to be informed on a screen change, or on a new implemented functionality, or a bug fixing; documentation changes that is pushed to the relevant trainee(s) is certainly going to increase the usability and the quality of trainee documentation.
- **Web 2.0/3.0:** Readers being able to react and/or to participate is a fact on the current internet scheme. The training documentation will be enriched by the business knowledge of trainers and trainees, by their suggestions and their experience, by updates of content developers or analysts. Why not thinking about WIKI, or dedicated social networking where business experts, technical persons, learners and teachers can enrich the common knowledge?
- **Embedded user assistance:** Assistance provided by the application to the learners without the users needing to search for this assistance. As an example we may consider a wizard in an application that guides the learners through the task.
- **Style guides:** the style guides (or framework) for information applications at corporate level is already simplifying the development of this information applications and thus will decrease the work of developing supporting documentation. In the same way style guide, or graphical charts, corporate templates and cascading style sheets will undoubtedly accelerate the process.
- **IMAP®** (information mapping) consists in a systematic process for analysing and re-engineering information to identify what the reader **needs to do** and **needs to know** (as opposed to nice to know), and organising and presenting information in a way that maximises usability and access, and increases users retention. It is expected to give the right level of detail to the right readers at the right moment with a concise and direct vocabulary, and a consistent and visual structure. The objective is to reach a standard presentation throughout all documentation, to obtain modular document and, therefore, **reusable components**. This approach is based on the following principles:

Principle	Description
Chunking	Do not present too much information in one go
Relevance	Restrict the information to what the reader needs
Labelling	Place relevant information together
Consistency	Give information titles to each information section
Integrated graphics	Consistently use the same words and the same presentation for comparable information
Accessible details	Integrate tables, drawings and graphic elements
Hierarchy of chunking and labelling	Give details where the reader needs them

- **Authoring suites:** Packages for developing innovative and powerful courseware are at the peak of their life, according to Gartner; the long learning curve for these suites is an important reason of slowing down the efficient use of these tools.

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- **Immersive "Edutainment"**: according to Gartner, "Multiple techniques and processes including artificial intelligence, gaming, simulation, collaboration, role playing, interactivity combined to generate scenarios and learning environments and keep the user attention. "Video footage or graphic modelling have not reached the lower costs, higher results, adaptability, flexibility and interactivity have not been achieved by enough vendors to provide truly engaging environments."
- **Mobile learning**: The term covers: learning with portable technologies, where the focus is on the technology; learning across contexts, where the focus is on the mobility of the learner, interacting with portable or fixed technology; and learning in a mobile society, with a focus on how society and its institutions can accommodate and support the learning of an increasingly mobile population. Mobile learning could be used as part of a learning approach which uses different types of activities (or a blended learning approach).

3.1. Anticipated impact and opportunities

The EC will have to develop an extended e-learning strategy by using more and more blended learning through its Virtual Learning Environment coupled with a diversification of user documentation: lighter, more intuitive documents (manuals, guidelines, quickcards) for end-users, more technical and exhaustive documentation for support purpose. Referring to the e-Commission, focus will be made on IS marketing (surveys, demos, etc.), in specific contexts where new comers join the end user community. This will have the following impacts on resources:

- In the long run, digitalisation will reduce training costs for participants who will be able to attend courses from their own PC in Brussels and abroad during office hours.
- It will imply to recruit new resources (blended teachers/tutors) to design courses in the e-learning format and therefore, implies an increased budget.
- Support for all the IT tools (Blackboard, Captivate, L'Atelier & Elluminate and/or Adobe Connect) will be boosted.

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Annex A – Training Evaluation Form

Introduction

Training Organisation

The following table lists the organisational details of the training course.

Table 2 - Organisation details

Organised by:	
Chaired by:	
Date:	
Location/Venue:	
Duration:	
Presenters:	
Participants:	

Attendees

Trainers

Training Agenda

Table 3 Training #1 – Programme/Agenda

Date	Time	Activity	Presenter
15/06/2014	14:00-16:00		
16/07/2014	08:30-10:00		
16/07/2014	10:15-12:00		

Overview

Training Material and Tools

The following table lists all material used during the training:

Activity	Material/Tools
-	

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Activity	Material/Tools
-	
-	

Training Infrastructure

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Annex B – Training Evaluation Form

Training Evaluation Form

[Title of Training]

[Place]

[Time]

Attendee Information (optional)

Name:

Address:

Organisation:

e-mail:

Tel.:

We would like to thank you for taking the time to answer the questions that follow. The information you provide us will be kept as confidential, and will allow us to improve the quality of the services we are offering.

Part 1.

How would you rate the quality of the training material? (place one mark)

- Inadequate**
- Less than Acceptable**
- Acceptable**
- Good**
- Very Good**

How would you rate the quality of the training session itself? (place one mark)

- Inadequate**
- Less than Acceptable**
- Acceptable**
- Good**
- Very Good**

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How would you rate the completeness of the information provided during the training session? (place one mark)

- Did not cover my needs for information**
Please state reason(s):
.....
- Covered several topics, but left many blank spots**
Please state:
.....
- Covered several topics, but left a few blank spots**
Please state:
.....
- All aspects were covered**

Part 2

How would you rate the training level of difficulty? (place one mark)

- Very easy**
- Easy**
- Just right**
- Difficult**
- Very difficult**

How would you rate the organisation of the training session? (Place one mark)

a) Time allocated to the presentation of various topics

- Satisfactory** **Acceptable** **Not Satisfactory**

Which are the topics for which you consider the time allocated as not satisfactory?
.....
.....

b) Time allocated for discussion and feedback

- Satisfactory** **Acceptable** **Not Satisfactory**

How would you rate the trainers? (place one mark)

- Inadequate**
- Less than Acceptable**
- Acceptable**
- Good**
- Very Good**

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Do you have any suggestions?

If you feel there are issues not covered during the training session or issues that we should try to improve on, we would feel obliged if you could help us by drawing our attention to them:

.....
.....
.....

Thank you!

XYZ Team

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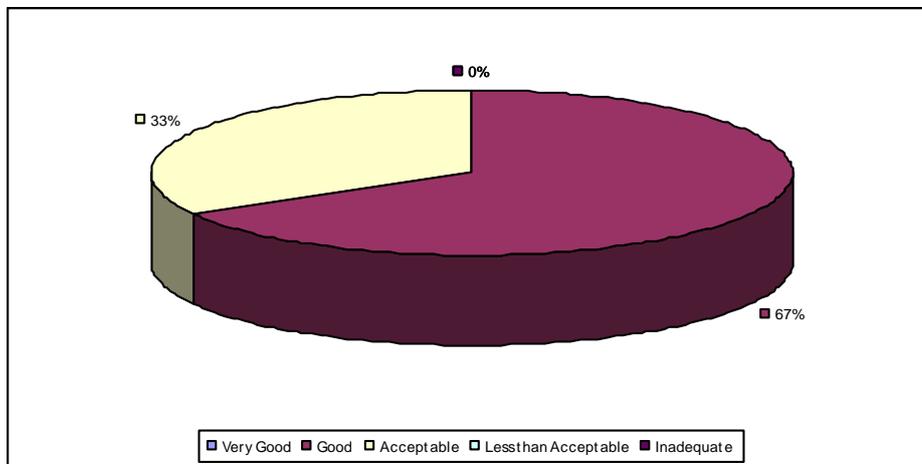
ANNEX C: Training evaluation report

The purpose of this report is to present the evaluation results of the training provided. Evaluation reports were submitted by the participants of the end-users’ session. The results presented here provide a summary of the information gathered from those questionnaires.

Part 1 - Evaluation of the presentation

Evaluation of the Training Material

Training Material				
Very Good	Good	Acceptable	Less than Acceptable	Inadequate
0	2	1	0	0

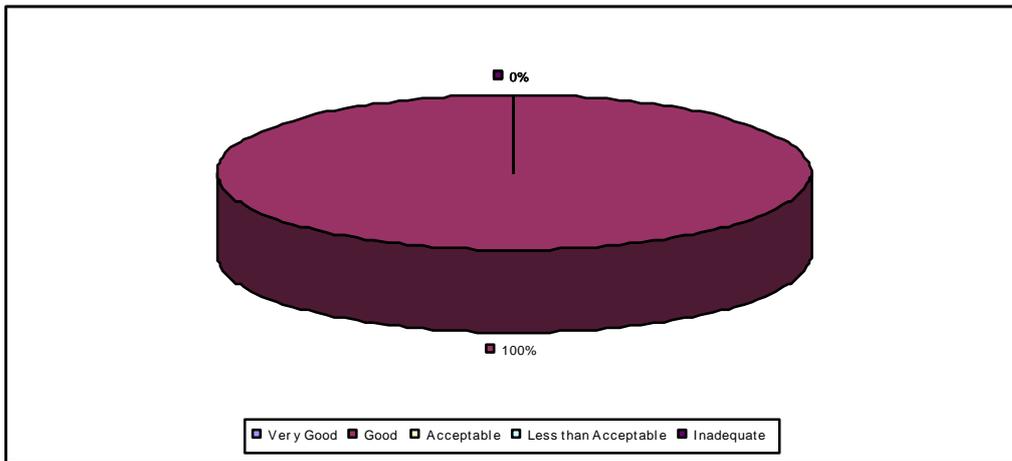


Note: One attendee did not answer this question.

EM, OAKE, DMAR, CCS	Deliverable: D3.1
PECOS4SMEs	Version: 1.0
D3.1 Training Methodology for SMEs	Issue Date: 08/11/2013

Training Session Quality

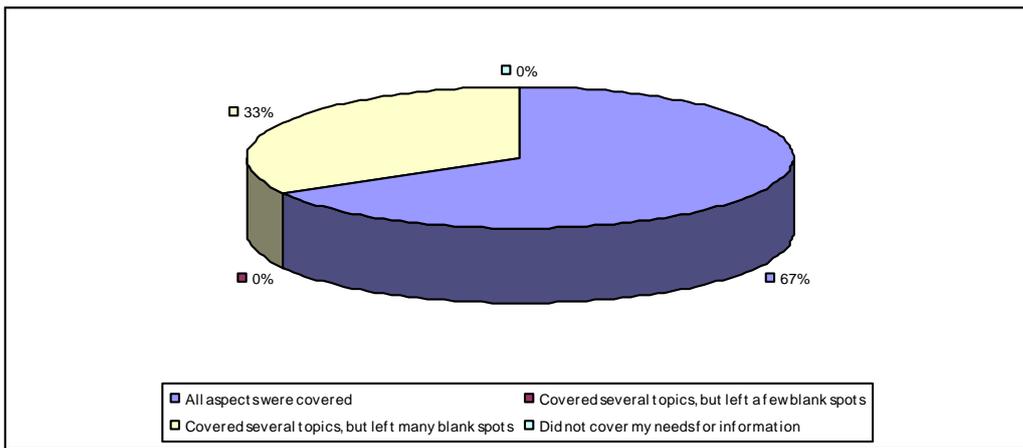
Training Session Quality				
Very Good	Good	Acceptable	Less than Acceptable	Inadequate
0	3	0	0	0



EM, OAKE, DMAR, CCS	Deliverable: D3.1
PECOS4SMEs	Version: 1.0
D3.1 Training Methodology for SMEs	Issue Date: 08/11/2013

Completeness of Information

Completeness of Information			
All aspects were covered	Covered several topics, but left a few blank spots	Covered several topics, but left many blank spots	Did not cover my needs for information
2	0	1	0

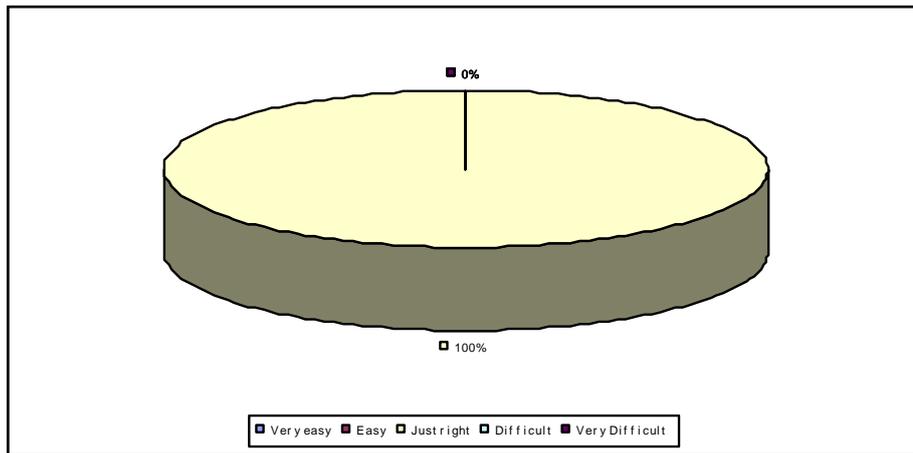


EM, OAKE, DMAR, CCS	Deliverable: D3.1
PECOS4SMEs	Version: 1.0
D3.1 Training Methodology for SMEs	Issue Date: 08/11/2013

Part 2 – Training difficulty, Trainers and Overall results

Training level of difficulty

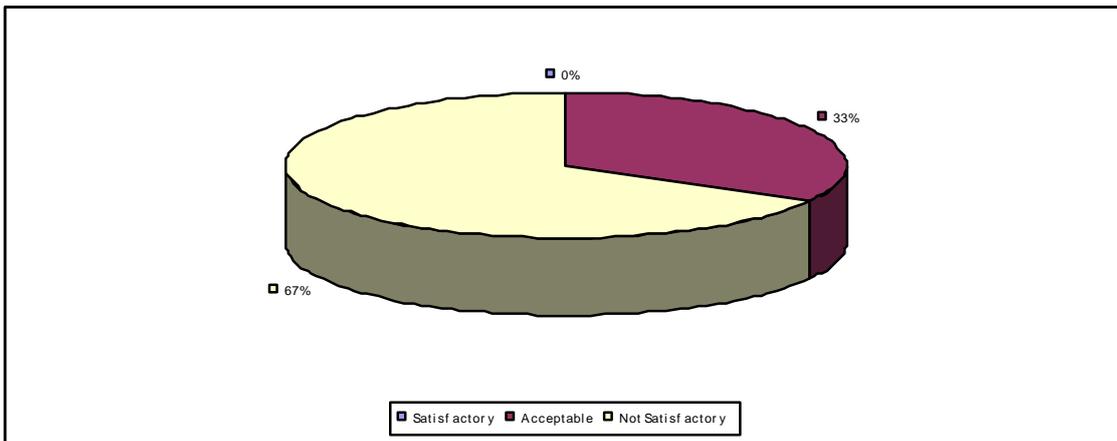
Training level of difficulty				
Very Easy	Easy	Just right	Difficult	Very Difficult
0	0	3	0	0



EM, OAKE, DMAR, CCS	Deliverable: D3.1
PECOS4SMEs	Version: 1.0
D3.1 Training Methodology for SMEs	Issue Date: 08/11/2013

Time allocated for various topics

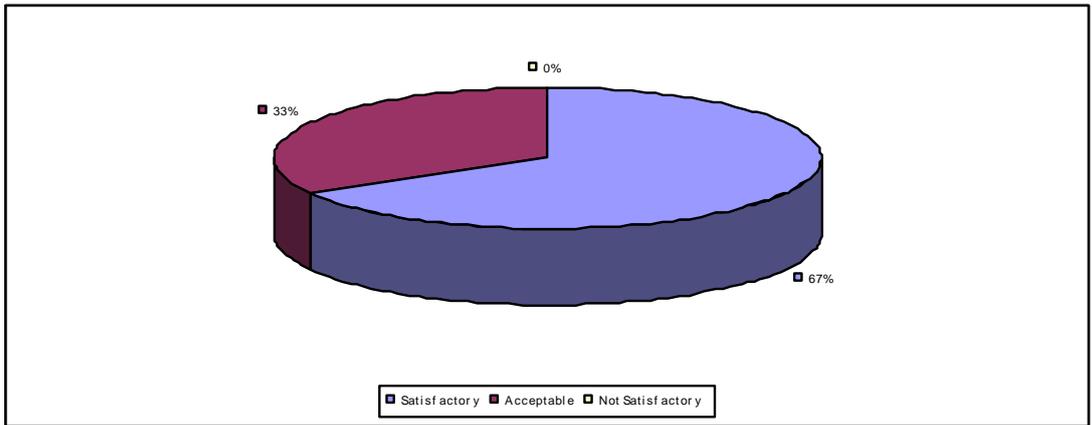
Time allocated for various topics		
Satisfactory	Acceptable	Not satisfactory
0	1	2



EM, OAKE, DMAR, CCS	Deliverable: D3.1
PECOS4SMEs	Version: 1.0
D3.1 Training Methodology for SMEs	Issue Date: 08/11/2013

Time allocated for discussion and feedback

Time allocated for discussion and feedback		
Satisfactory	Acceptable	Not satisfactory
2	1	0



EM, OAKE, DMAR, CCS	Deliverable: D3.1
PECOS4SMEs	Version: 1.0
D3.1 Training Methodology for SMEs	Issue Date: 08/11/2013

Trainers' evaluation

Trainers evaluation				
Very Good	Good	Acceptable	Less than Acceptable	Inadequate
2	1	0	0	0

