WP 6

Testing Report - Portugal

Tested: UFCD 1.1 Commercial prospection and sales planning through interactive or digital means

Tested: On-line tool for the self-assessment of competences

UC 1 - To carry out the commercial prospection and plan the sales of products and services available to the clients through interactive or digital means

UC 2 – To assist and advise the customers on products and services through interactive or digital means

UC 3 - To sell products and services through interactive or digital means

Lisboa, March 2018

1. Introduction

ALLECOM project aims at addressing the challenge of skills and competencies imbalance within the commerce sector by improving commerce human resources' qualifications in e-commerce through the integration of new technologies in the strategy of both retail and wholesale commerce and by contributing to ensure harmonization at national and European level of standards of qualifications and skills in the e-commerce.

Within the project previous phases, several training materials and contents considered as appropriate training answers in the field of e-commerce to the commerce sector needs in the 3 partner countries were developed.

Also, it was felt as necessary to develop tools to assess and acknowledge the professional competences of the commerce sector human resources to deal with e-commerce and the use of digital technologies in the commercial activity of a company, at large. For that purpose it was developed an online tool for the self-assessment of competences in the field of e-commerce aiming to self-assess competences but also to diagnose training needs in these areas and guide respondents to available resources that can help developing skills in those particular areas.

Competences assessed are organised by Competence Units (UC), UC that have been also defined in the previous stages of the project.

Running pilot testing of created materials and tools is always an ambition in any project that wants to prove to have created sustainable results. ALLECOM project is no different, so an extensive and in-depth testing phase was planned (WP6) and accomplished.

This report reflect the results of this testing phase in Portugal and conclusions presented are mostly the result of the information obtained through the satisfaction evaluation made by the participants in the testing phase (pilot course and online self-assessment tool) but also by feedback and opinions expressed by staff involved in the running of the testing.

In Portugal testing activities took place from January to March 2018, involving 35 participants in the training (annex 1 and annex 2) and 21 participants in the testing of the on-line self-assessment tool.

2. Description of the activities

Training Materials/MOCCs

In Portugal the training unit that was tested was the **UFCD 1.1 Commercial prospection and sales planning through interactive or digital means,** one of the training units developed by the Portuguese project team with the technological support of the Spanish partner, IBECON.
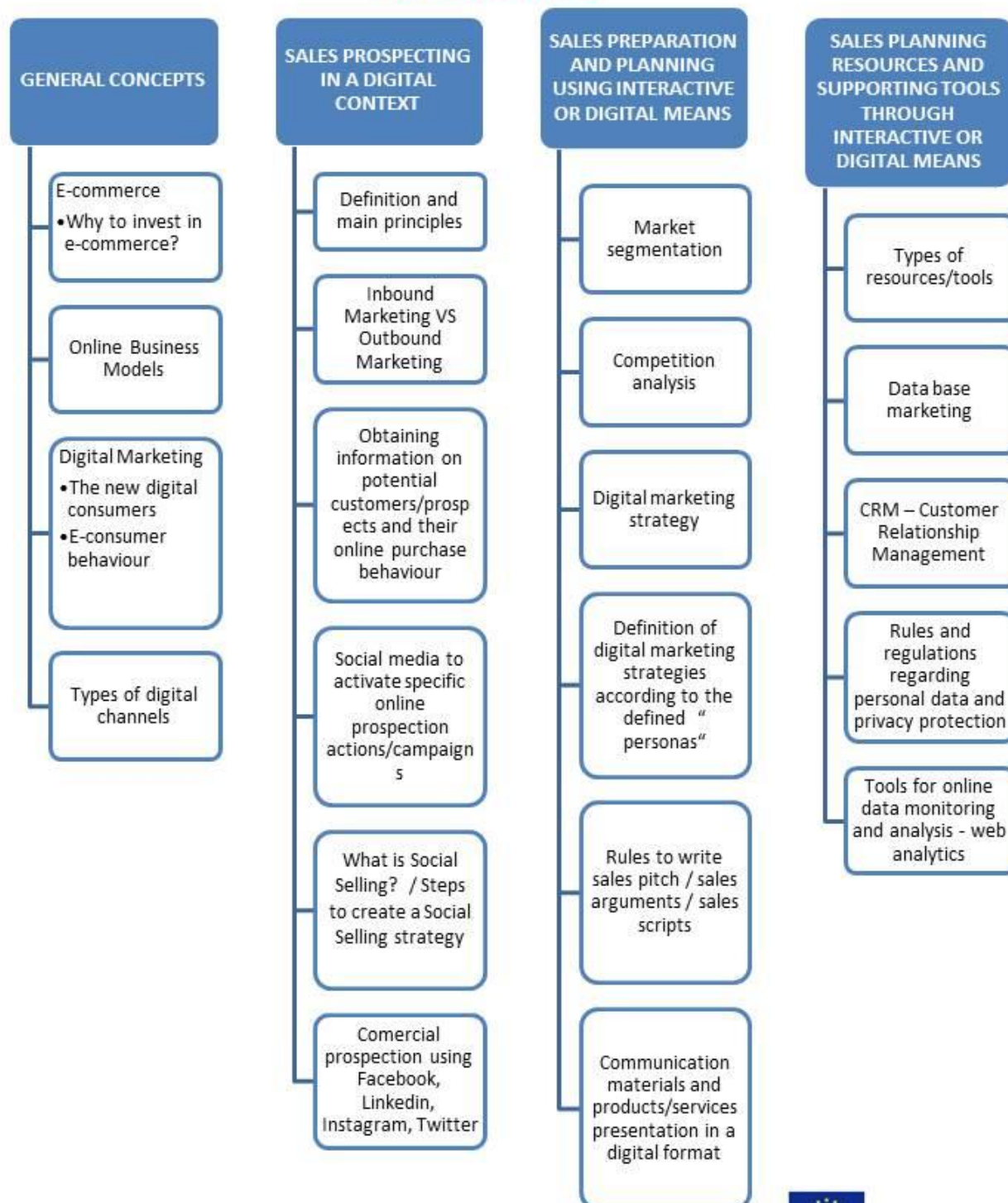
The learning objectives of this training unit were:

- To recognise the principles of e-commerce - from designation, to the advantages and disadvantages of online sales, to identifying business models and online sales channels;
- To describe and apply the main techniques and means of prospecting in a digital context;
- To identify the phases of sales preparation and planning by online means;
- To recognise resources and tools to support sales planning by online means;
- To define your online sales strategy by clearly identifying your goals, the target audience and your action plan.

And the main contents can be described in the following conceptual framework:

UFCD 1.1 - Commercial prospection and sales planning through interactive or digital means

CONCEPTUAL MAP

GENERAL CONCEPTS

- E-commerce
  - Why to invest in e-commerce?
- Online Business Models
- Digital Marketing
  - The new digital consumers
  - E-consumer behaviour
- Types of digital channels

SALES PROSPECTING IN A DIGITAL CONTEXT

- Definition and main principles
- Inbound Marketing VS Outbound Marketing
- Obtaining information on potential customers/prospects and their online purchase behaviour
- Social media to activate specific online prospection actions/campaigns
- What is Social Selling? / Steps to create a Social Selling strategy
- Comercial prospection using Facebook, Linkedin, Instagram, Twitter

SALES PREPARATION AND PLANNING USING INTERACTIVE OR DIGITAL MEANS

- Market segmentation
- Competition analysis
- Digital marketing strategy
- Definition of digital marketing strategies according to the defined "personas"
- Rules to write sales pitch / sales arguments / sales scripts
- Communication materials and products/services presentation in a digital format

SALES PLANNING RESOURCES AND SUPPORTING TOOLS THROUGH INTERACTIVE OR DIGITAL MEANS

- Types of resources/tools
- Data base marketing
- CRM – Customer Relationship Management
- Rules and regulations regarding personal data and privacy protection
- Tools for online data monitoring and analysis - web analytics

Erasmus+

Evaluation activities were organised following a standard evaluation questionnaire that was common to all partners testing the materials (see annex 3).

Online tool for the self-assessment of competences in the field of e-commerce

The online tool for the self-assessment of competences was tested in Portugal involving 21 respondents that tested the tool regarding the following Units of Competence:

- UC 1 - To carry out the commercial prospection and plan the sales of products and services available to the clients through interactive or digital means;
- UC 2 – To assist and advise the customers on products and services through interactive or digital means;
- UC 3 - To sell products and services through interactive or digital means.

Those UC as well as the questions to assess the competences and that are part of the self-assessment tool were also developed by the Portuguese team, in previous stages of the project (annex 4).

The transformation of the materials created to an online digital setting was made by the Spanish partner IBECON with strong cooperation among all partners involved.

Evaluation activities were organised following a standard evaluation questionnaire that was common to all partners testing the materials (see annex 5).

3. Methodological approach

Training Materials/MOCCs

In Portugal the training unit that was tested was the **UFCD 1.1 Commercial prospection and sales planning through interactive or digital means**, one of the training units developed by the Portuguese project team. The training materials were developed in Portuguese to enable testing at national level.

The materials were tested in a b-learning setting, with 19 learning hours online and 6 face to face hours (25 hours in total).

The test was organised in 2 training editions, one running the face to face activities in Lisbon (23 participants enrolled; 20 active participants) and another one running the face to face activities in the North of Portugal, in Oporto (19 participants enrolled; 15 active participants).

The same staff followed the 2 courses: an e-trainer and an e-manager from Portugal with the technological support of the Spanish partner, IBECON.

The face to face activities took place in the beginning of each training course, to introduce the learning objectives and contents, explain the methodological approach and the correct use of the LMS used (moodle) and almost at the end of the learning process, to assess learning, overcome difficulties and assess satisfaction with the training. During on-line learning, participants were expected to visualise the contents, complete the activities and do the evaluation tests at the end of each didactic unit and the final evaluation test at the end of the learning process. During the

process, participants get feedback and support from the staff through evaluation of the activities, online forums and through e-mail exchanges, whenever necessary.

The evaluation activities were made mostly online with participants answering to the evaluation satisfaction questionnaire made available on the platform but also qualitative feedback and improvement suggestions were collected by staff in the last face-to-face session organised for each course.

Online tool for the self-assessment of competences in the field of e-commerce

The online tool for the self-assessment of competences was tested in Portugal involving 21 different respondents.

The following Units of Competence (UC) were tested and 59 answers to the questionnaires were obtained:

- UC 1 - To carry out the commercial prospection and plan the sales of products and services available to the clients through interactive or digital means (20 answers obtained);
- UC 2 – To assist and advise the customers on products and services through interactive or digital means (20 answers obtained);
- UC 3 - To sell products and services through interactive or digital means (19 answers obtained).

The testing of the tool was implemented at distance, through an online self-assessment process in which participants were invited to answer, asked by e-mail to register in the tool, access it, try and test the tool and self-asses his/her competences on e-commerce regarding UC 1, UC2 and UC3.
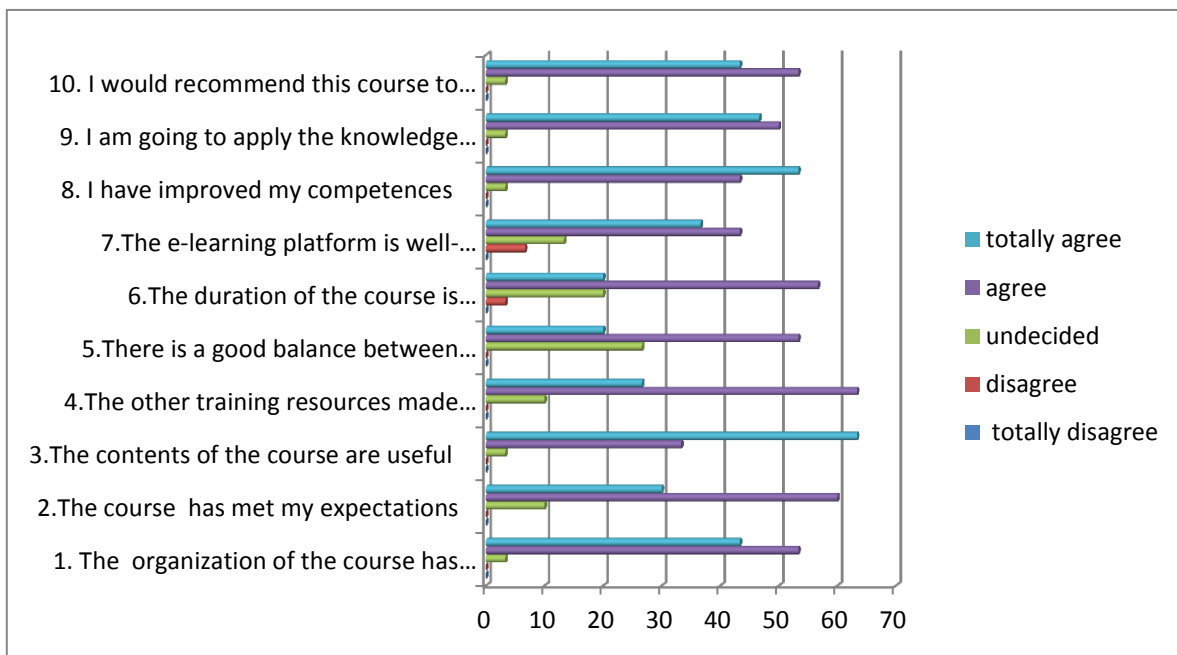
At the end of the process respondents were asked to fill in the online satisfaction evaluation questionnaire.

4. Analysis of results

Training Materials/MOCCs

From the 35 participants, 30 answered to the evaluation questionnaire made available for participants through the moodle platform. A detailed evaluation report per course was produced but is only available in Portuguese (annex 6 and annex 7).

For report testing results purposes, the results of the 2 groups were grouped and the results are as follows:

According to the data reported it can be stated that **the satisfaction with the course was very high**:

- The organization of the course has been considered totally appropriate for the optimal development of the activity by 53% of the participants and appropriated by 43% (96% positive reaction, in total);
- The course totally met the expectations of 60% of the participants and met the expectations of 30% (90% positive reaction, in total);
- The contents of the course were considered totally useful by 63% of the participants and useful by 30% (96% positive reaction, in total);
- The other training resources made available were considered suitable by 63% and totally suitable by 27% (90% positive reaction, in total);
- 53% of the participants considered that there was a very good balance between contents, practical exercises/activities, other resources/additional information and 20% considered the balance only positive (73% positive reaction, in total);
- The duration of the course was considered very suitable for 57% of the participants, 20% considered it suitable (77% positive reaction, in total) but 3% of the participants considering the duration not suitable;

- 43% of the participants stated that the e-learning platform is well-structured and easy to use and 37% stated that it is very well-structured and very easy to use (80% positive reaction, in total) but 7% of the respondents said they disagree with this;
- At the end of the training 53% of the participants totally agreed that "they had improved their competences" and 43% agreed (96% positive reaction, in total);
- 47% of the participants totally agree with the statement "I am going to apply the knowledge acquired" and 50% agreed (97% positive reaction, in total);
- 43% of the participants totally agree with the statement "I would recommend this course to others" and 53% agreed (96% positive reaction, in total).

It is nevertheless possible to identify 3 items with scores 80% or less:

- Balance theory/practice - 73 %;
- Duration - 77 % (3% negative evaluation);
- Structure/usability e-learning platform - 80 % (7% negative evaluation).

Participants were also asked to give comments to each evaluation item and the results obtained can be summarised as follows:

The organization of the course has been appropriate for the optimal development of the activity:

- To monetize the first face-to-face session;
- "I wish I had known that it was necessary to have an active account in various social networks";
- An optional intermediate face-to-face session could be an asset, in order to take stock of the training development;
- To have synchronous sessions, at least one;
- More face-to-face sessions, maybe 1/3 of the time being face-to-face to ask questions and listen to information given by the teacher (it makes it easier to understand);
- Good content management and promptness in clarifying doubts;
- Have more practical activities.

The course has met my expectations:

- "Not initially but in the end it was rewarding because I ended up learning the basics on this subject";
- Needed a little more time or more face-to-face sessions;
- "State of the art" and appropriate content, however, the themes could be addressed in a more detailed way.

The contents of the course are useful:

- The contents are sufficient, practical and oriented to the creation / management of businesses, are appropriate to the subject and very useful mainly for those who want to

acquire knowledge in the area, however, some topics could be more developed.

The other training resources made available are suitable:

- Yes, but there could be more external links to articles and videos;
- All available resources are relevant.

There is a good balance between contents, practical exercises/activities, other resources/additional information:

- Is balanced;
- Have more theory and fewer activities, or more personalized activities;
- Some practical activities did not have enough learning content to support for their development;
- The number of activities may be excessive.

The duration of the course is suitable for the training contents proposed:

- Perfectly fit; 25 hours was enough to cover all the necessary topics; more than this would have been boring and demotivating;
- The contents are very compact, if the participant does not have some marketing basic knowledge, it may be needed additional time;
- I needed more than 25 hours to complete;
- Based on the number of activities and the extension of learning content a few more hours could be added;
- Maybe another 2 weeks taking into consideration the number of practical activities.

The e-learning platform is well-structured and easy to use:

- The platform is user friendly, it is well structured, although it needs some improvements at the level of navigation within the menus;
- The platform though understandable, is not very user friendly;
- Could be more dynamic;
- Graphics have poor resolution, there are not many links;
- Videos could be added;
- When we enter again it could open directly into the activity / learning content we left;
- When we exit each exercise, we must return to the home page and re-enter the module which is not so good;
- When submitting exercises/practical activities or doing the tests we have to confirm everything many times;
- The activities, as the tests, should also have 3 possibilities of response, not just one that is definitive;
- It should be possible to carry out the evaluation without having to do the activities before;
- Very positive the fact that the exercises/activities are sent privately and not placed in a public forum.

Finally participants were asked to provide feedback regarding the positive aspects of the training ("the best of the course have been") as well as improvement suggestions ("What should be improved").

The best of the course have been:

- Application in daily work;
- Contents;
- Acquisition of knowledge;
- Practical activities;
- Flexibility;
- The appropriate use of technical terms.
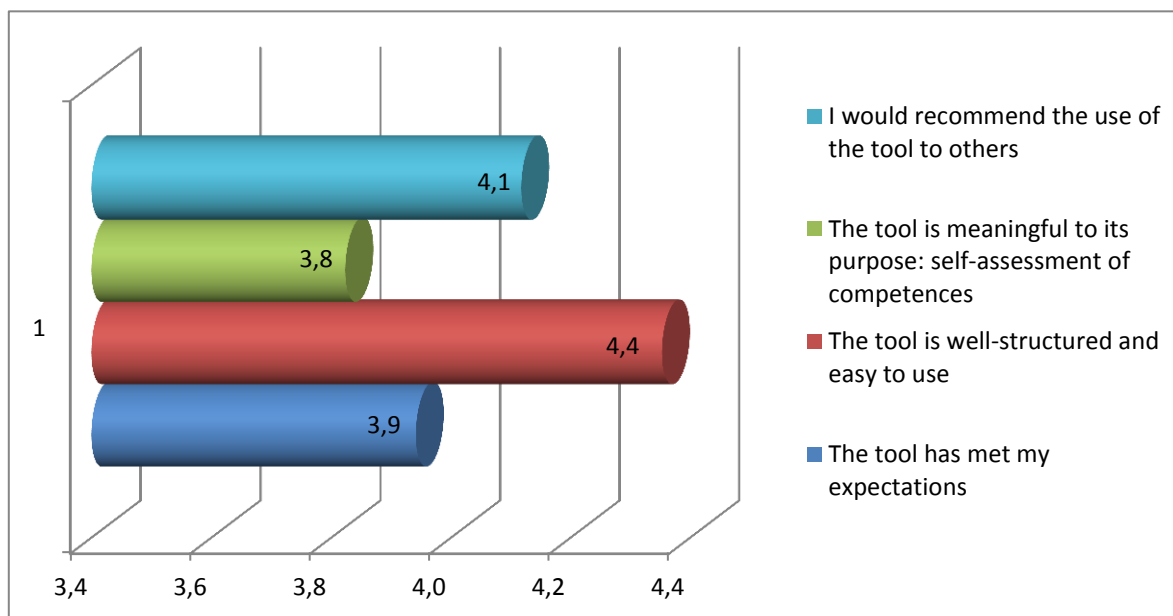
What should be improved?

- Tests duration;
- More dynamic content exposure;
- To have synchronous sessions;
- Organization of activities;
- Reducing the time taken by trainer to give feedback on the practical activities;
- Interaction with the participant;
- Content;
- More face to face sessions;
- Platform functionality and intuitiveness;
- Reducing the number of exercises in module 1;
- Reducing the complexity of module 4 legislative information.

Online tool for the self-assessment of competences in the field of e-commerce

From the 21 participants, 17 answered to the evaluation questionnaire made available in the self-assessment online tool.

The questions were formulated in a 5 point-scale in which 1 means "totally disagree" and 5 "totally agree"

The following results can be highlighted:

Another way of analysing data is to say that:

- 76% of the respondents agreed and totally agreed that the tool met their expectations
- 82% of the respondents agreed and totally agreed that the tool is well-structured and easy to use
- 71% of the respondents agreed and totally agreed that the tool is meaningful to its purpose: self-assessment of competences
- 88% of the respondents agreed and totally agreed that the information provided with the results is useful
- And finally 76% of the respondents said that they agree or totally agree to recommend the use of the tool to others
- Clearly there is a positive evaluation of the tool in all asked dimensions particularly regarding the dimension "usefulness of the information provided with the results"

Respondents were also asked to provide other comments and feedback regarding types of utility found in the tool and aspects to improve.

What utility you find in the tool?

- Usefulness of the links provided;
- Content structure;
- To allow self-assessment of knowledge (3);
- To be used as a self-assessment tool previous to the entrance into a training course, to allow a better "match" between the level of knowledge of the students and the entrance requirements of a specific training course;
- To support better homogeneity in training groups;
- After a training process it can also be used as an learning assessment.

What aspects should be improved in the tool?

- To be able to know which answers were not right and why (2);
- More questions not so extensive;
- To have practical activities that could lead to validation of skills and competences;
- Some of the questions are not clearly formulated;
- More topics should be addressed by the self-assessment tool (2) and more in-depth self-assessment should also be available.

5. Conclusions

Training Materials/MOCCs

The two groups were heterogeneous namely in terms of previous knowledge/experience. From the oral feedback collected in the final session of each training edition/group, this fact can explain some of the opposite feedback received by participants. For instance, some said that duration is perfect and some said they spend more time and even that they needed more to fully achieve the learning objectives; some found the exercises and practical activities too much or too complex and others found it appropriate.

Also it was evident that there were not only different previous level of knowledge on the subject but also that there were different levels of expertise in the use of technology and interactive and social means, and as important, different learning styles: in fact, the suggestion to have more face-to-face sessions can be explained, on one hand, by the learning style of the participant but, on the other hand, by the low level of expertise on the topic and use of technology latu sensus.

Nevertheless, it is fair to say that being mostly at distance was recognised as being an advantage in terms of time personal and professional organization and for geographical reasons. Only because it was at distance, it was possible for many of the participants to participate (the organiser even facilitated that the face-to-face sessions to those working and leaving far from Lisbon or Porto – some participants leave more than 300 km away – was replaced by one-to-one skype sessions or skype participation in the face-to-face sessions).

Contents as well as training resources were considered as a positive aspect (appropriate, enough, useful, business oriented and practical), although, some claimed for more in-depth contents and a better balance between theory and practice was pointed out as something to improve.

Although 80% of the respondents stated that the platform is well structured and user friendly, there were 7% that disagree and gave some improvement suggestions concerning the need for inclusion of more dynamic contents (videos, etc) and a better graphic design. Relevant and probably easy to implement changes are: to be able to re-enter directly in the last content visited; to allow 3 attempts of answer in the activities, as in the tests.

Finally and more important, improvement of professional skills was a top objective of the participants and this was, according to our analysis, achieved as those were the main participants expectations and those were considered as met by 90% of the participants.

Also, relevant to mention that all the 20 active participants in training session/group 1 in Lisbon finished the course and 19 fully achieved the learning objectives, complied with the assessment criteria and got a certificate (annex 8). Regarding the second group from Porto, all the 15 active participants finished the course and 13 fully achieved the learning objectives, complied with the assessment criteria and got a certificate (annex 9).

Online tool for the self-assessment of competences in the field of e-commerce

Although the overall level of satisfaction with the tool was high and that the tool was considered as "easy to use" by 82% of the respondents, some asked for support and guidance because they couldn't manage on their own. This has to be partially with the low level of digital skills of the respondents but also because the tool has some usability features that need to be improved if non guided self-assessment is to be the frame for the use of the tool.

Important to state that clearly there is a very positive evaluation regarding the dimension "usefulness of the information provided with the results" which is a very interesting data and a challenge, if we want it to be updated in the future. Also a challenge and a potential pathway to further development is the suggestion presented by respondents to enlarge the scope of the tool to other topics.

It is also worthwhile to mention that the tool fit the purposes it was created for – self-assessment of competences – but it can also be used for other purposes such as: self-assessment tool previous to the entrance into a training course; after a training process it can also be used as an learning assessment and to support better homogeneity in training groups.

6. Annexes

Training Materials/MOCCs

- Annex 1 - Participants List – Group 1 – Lisbon
- Annex 2 - Participants List – Group 2 – Porto
- Annex 3 - Evaluation questionnaire
- Annex 6 – Evaluation report – Group 1 – Lisbon
- Annex 7 – Evaluation report – Group 2 – Porto
- Annex 8 – Participants assessment results and Certificates – Group 1 – Lisbon
- Annex 9 – Participants assessment results and Certificates – Group 1 – Lisbon

Online tool for the self-assessment of competences in the field of e-commerce

- Annex 4 – Self-assessment questionnaires – UC1, UC2 and UC3
- Annex 5 - Evaluation questionnaire