

Training Curricula and Contents

English Version

Elaborated by nowa

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1. Introduction

After skills gaps from the target group were detected and the mismatches between the existing qualifications/training offers and the training needs regarding e-commerce were identified in the previous research phase, the project started to implement tasks and elaborate results in the developing phase.

The following steps were taken:

- ➔ Exchange methodologies for the design of qualifications and recognition of competences in the partner countries.
- ➔ Agree on a common methodology for the design of qualifications and recognition of competences, using as a reference EQF and EQAVET.
- ➔ Give the opportunity to actors of the commerce sector to meet face to face in a mobility activity, with the aim to exchange experiences and knowledge about qualifications and recognition of competences.
- ➔ Define new learning outcomes related to e-commerce in terms of Knowledge, Skills and Competencies (KSC), applying the EQF and EQAVET approaches and principles.
- ➔ Design and/or redesign national professional qualifications, incorporating the learning outcomes defined, as well as in National Qualifications Framework.
- ➔ Elaborate a common map of qualifications for all implementing countries in the commerce sector, while including the new learning outcomes related to e-commerce.
- ➔ Develop the training curricula and contents necessary to achieve the learning outcomes previously defined.
- ➔ Corroborate the results of this phase through a validation process with experts namely those who participated in the research phase.

The final results of these activities could contribute to propose updates on the European Skills, Competences, Qualifications and Occupations Classification (ESCO).

Seven common Units of Competence (UCs) in the field of e-commerce were defined by partners. These units are based on researches regarding skills gap and training offers/innovative learning methods, national compilations of already existing qualifications and a common

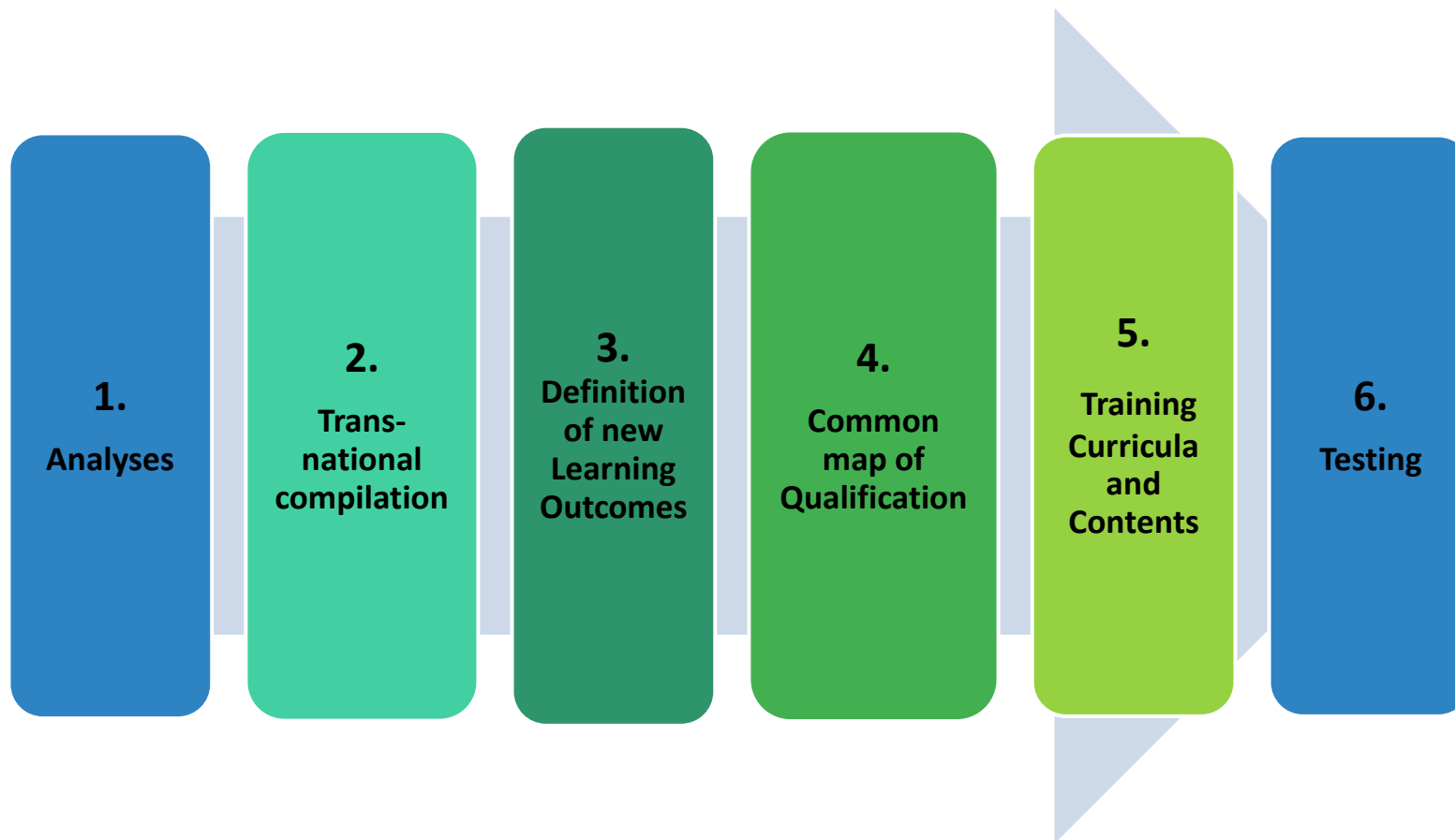
agreement for the further development of qualifications at the staff mobility that took place in Barcelona in the framework of the project activities.

These **seven UCs in SELLING and MARKETING** are a common product elaborated by all partners. They will be integrated in existing national/regional qualifications and/or integrated as such in the National Qualification systems of the partner countries according to defined national strategies.

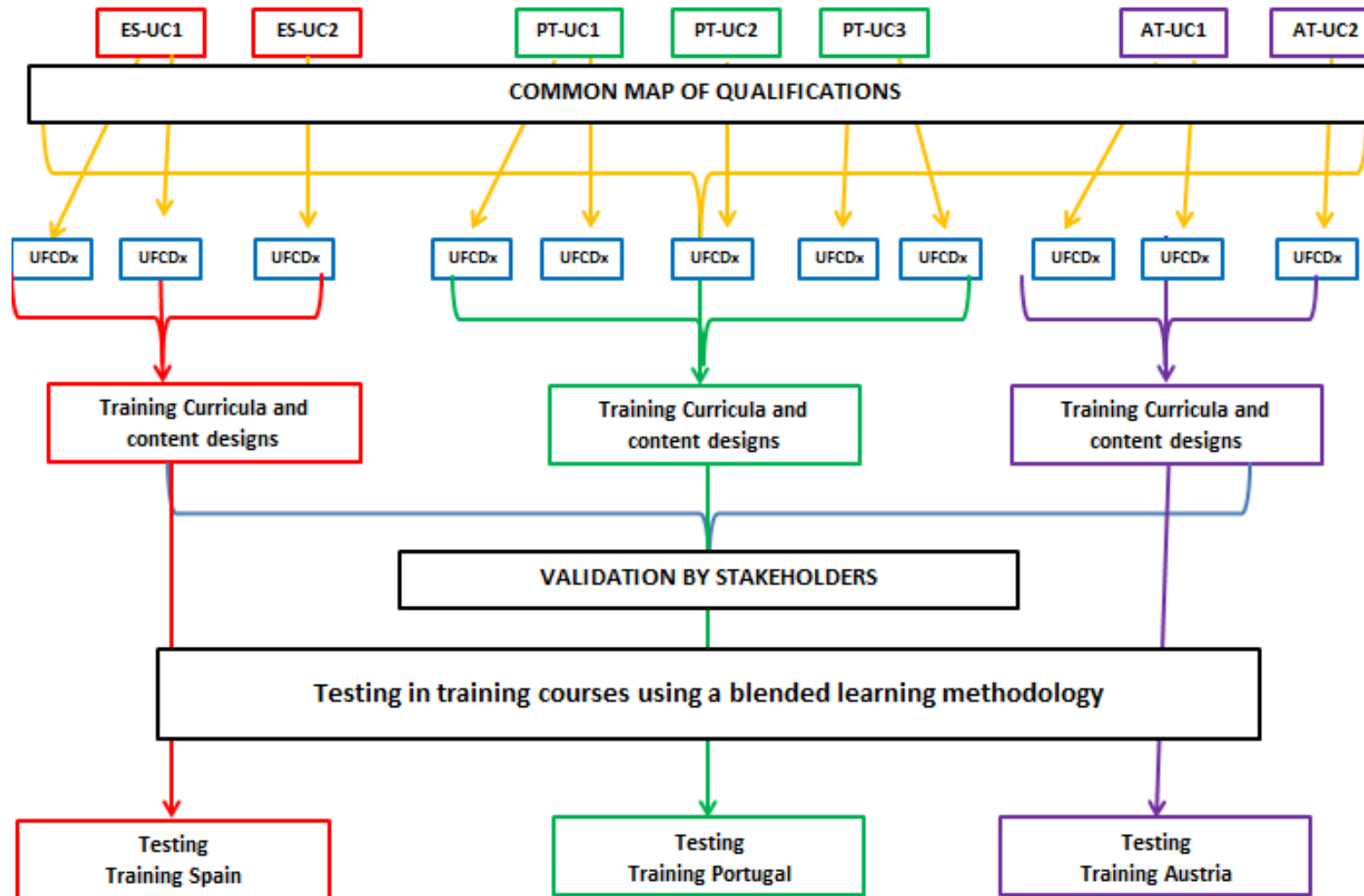
As a next step **“Training curricula and contents”** based on these common UCs were developed. Each partner country developed training modules corresponding with previously developed UCs.

The whole process and the results were **validated by stakeholders** of relevant public and private organizations, employers, employees and VETs, in the field of commerce.

These stakeholders and the project partners will assure the sustainability of the project results specifically the integration of the 7 UCs into the national qualification systems.



This figure illustrates the entire process and the further steps to be accomplished

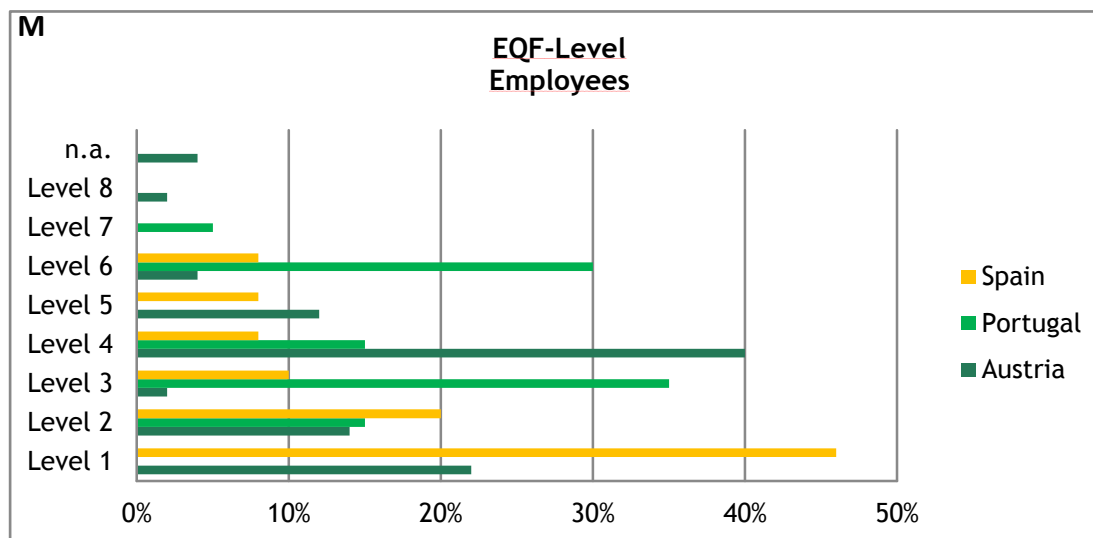


2. Methodology

Elaborating Training Curricula and Contents

Training curricula and contents for the new defined learning outcomes were developed. The same partners in charge of this learning outcomes definition were in charge of the design of the corresponding training curricula and contents. This was done by the VET providers in each implementing country.

The training material will include training curricula and training contents about e-commerce, generated from the common Units of Competences developed during the project. They will be available in all partner languages, incorporated in online courses using MOOC-format and will be further tested.



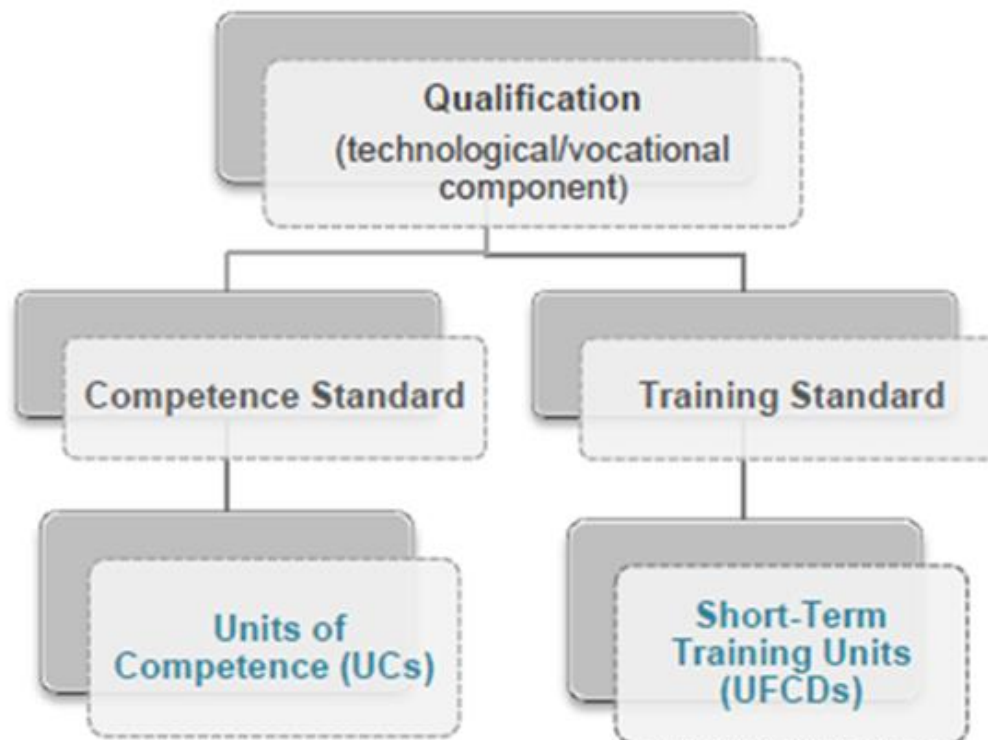
Missing digital and technological skills

- General e-commerce skills
- Role and function of e-commerce
- Working with new technological applications
- Training concerning online consumers, motivation, purchase, marketing
- Using social media to communicate with clients
- Using of e-commerce and social media to increase sales

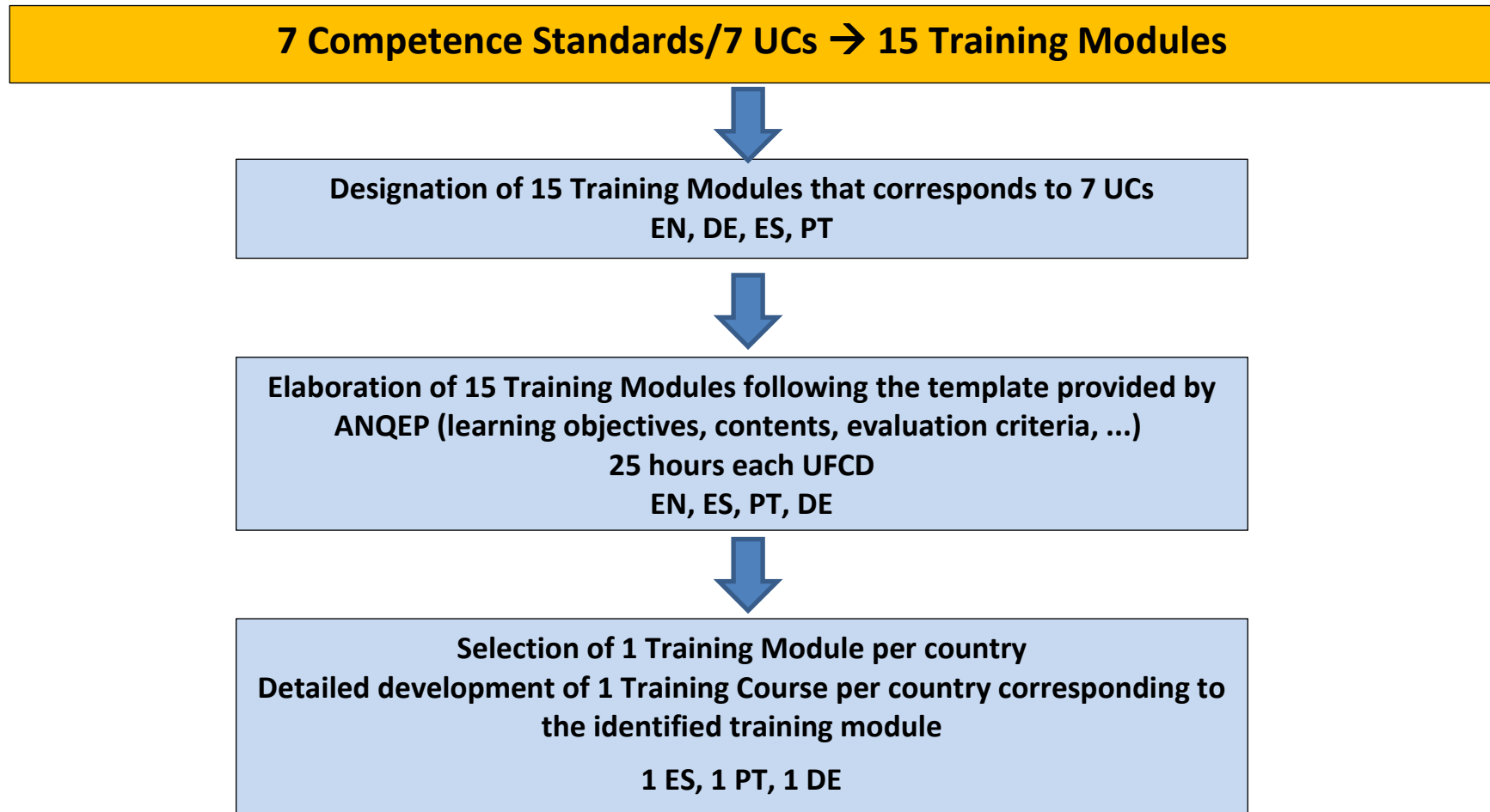
Based on previous results (see below) and **Units of Competence (UCs) Training Modules (MODULEs)** in the field of e-commerce on **EQF-level 3/4** in the functional areas of **Selling and Marketing**, with **duration of 25 hours** each were elaborated.

Structure for the common design of qualifications based on learning outcomes

Based on the “Methodological Guidebook” ANQEP 2015, agreed in the staff mobility in Barcelona, June 2016.



Development Stages of Training Modules



3. Training Modules – Identification

Based on the 7 Competence Standards/7 UCs and supervised by ANQEP, partners defined 15 Training Modules – 25 hours per Module.

Country	Functional Area	Unit of Competence/UC	Training Module
Portugal	SELLING prospection, assistance, selling and post- selling	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	MODULE 1.1 Commercial prospection and sales planning through interactive or digital means
		UC 2 To assist and advise the customers on products and services through interactive or digital means	MODULE 2 /3.1 Communication through interactive or digital means MODULE 2.2 Customer service through interactive or digital means
		UC 3 To sell products and services through interactive or digital means	MODULE 2 /3.1 Communication through interactive or digital means MODULE 3.2 Selling through interactive or digital means: process MODULE 3.3 Selling through interactive or digital means: documentation

Country	Functional Area	Unit of Competence/UC	Training Module
Austria	SELLING prospection, assistance, selling and post- selling	UC 4 To do the post-sale monitoring through interactive or digital means;	MODULE 4/5.1 E-Commerce Basics MODULE 4.2 Post sales follow up through interactive or digital means MODULE 4.3 Customer satisfaction assessment
		UC 5 To handle and monitor customer complaints through interactive and digital means	MODULE 4/5.1 E-Commerce Basics MODULE 5.2 Complaints management through interactive and digital means

Country	Functional Area	Unit of Competence/UC	Training Module
S p a i n	MARKETING	UC 6 To formulate e-marketing plans in collaboration with the marketing manager/director	MODULE 6.1 E-consumer behaviour and needs MODULE 6.2 Market research for the digital commerce of products and services MODULE 6.3 E-marketing planning
		UC 7 To establish and monitor e-marketing plans in collaboration with the marketing manager/director	MODULE 7.1 Organization of e-marketing activities: Action plan MODULE 7.2 Developing e-marketing plans MODULE 7.3 Monitoring and evaluation of e-marketing plans

4. Elaborated Training Modules

Partners elaborated 15 Training Modules following a template provided by ANQEP.
(Learning objectives, contents, evaluation criteria, ...)
25 hours each MODULE

Portugal:

MODULE 1.1 Commercial prospection and sales planning through interactive or digital means	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
<i>Learning objectives:</i> <ul style="list-style-type: none">➔ To identify the e-commerce principles➔ To describe and apply the main sales prospecting techniques applicable in a digital context➔ To identify the phases of sales preparation and planning through interactive or digital means➔ To recognize resources and supporting tools to the sales planning through interactive or digital means	

Contents:

- **General concepts**
 - E-commerce: definition, scope and main features
 - E-marketing: definition, comprehensiveness and features
 - E-consumer and e-consumer behaviour
 - User Experience (UX) concept
 - Types of digital channels
- **Sales prospecting in a digital context**
 - Definition and main principles
 - Sales prospecting techniques through interactive or digital means: inbound, outbound, partnerships and mix techniques
 - Use of social media and other interactive or digital means (websites, blogs, dynamic e-newsletters, mobile devices, etc) to obtaining information on potential customers/prospects and their online purchase behaviour
 - Use of social media and other interactive or digital means to carrying out specific sales prospecting campaigns
- **Sales preparation and planning using interactive or digital means**
 - Definition of targets
 - Definition of interactive or digital means to use according to the targets
 - Preparation of the sales pitch / sales arguments / sales scripts
 - Preparation of the product presentation materials in an interactive or digital format
- **Sales planning resources and supporting tools through interactive or digital means**
 - Types of resources/tools
 - Data base marketing
 - CRM – Customer Relationship Management
 - Tools for online data monitoring and analysis
 - Written digital communication techniques
 - Rules for the writing of sales pitch / sales arguments / sales scripts
 - Product interactive or digital presentation materials
 - Rules and regulations regarding personal data and privacy protection

Evaluation criteria:

- **Naming the main sales prospecting techniques through interactive or digital means**
- **Identification of ways on how to use social media and other interactive or digital means to prospecting new customers**
- **Description of the phases of sales preparation and planning through interactive or digital means**
- **Description of two interactive or digital means suitable to be used according to a given target**
- **Explanation of two main arguments to be used to sell a pre-determined product**
- **Identification of at least two resources and/or supporting tools that can be used to serve the purpose of supporting the sales planning through interactive or digital means**

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Products/outputs

- **Potential customers' database/register**
- **Sales plan**
- **Sales pitch/sales arguments**
- **Sales script**
- **Product interactive or digital presentation materials**
- **Registration in technological based information system of the information regarding sales prospecting**

MODULE 2/3.1

Communication through interactive or digital means

UC 2+3

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

To sell products and services through interactive or digital means

Learning objectives:

- ➔ To identify critical factors of business communication via telephone or omnichannel platforms
- ➔ To explain communication techniques, both verbal and nonverbal, specific to business communication through interactive or digital means
- ➔ To identify and apply the communication rules applicable to different distance communication channels (over the phone and online)

Contents:

- **Communication process and communication styles**
 - Elements involved in the communication process
 - Role and importance of the different elements involved in the communication process
 - Internal and external barriers to communication
 - Communication facilitators
- **The verbal and nonverbal aspects of communication**
 - Verbal and nonverbal communication
 - Verbal communication - types (oral and written), features and functions
 - Nonverbal communication - features and functions
- **Assertive communication**
 - Characteristics of the different communication styles
 - Particularities and advantages of the assertive profile
 - Empathy, active listening / dynamic listening

- Assertive communication techniques
- **Specificities of business distance communication**
- **Importance of integrating the concept of User Experience (UX)**
- **Principles of communication over the phone**
- **Principles of communication through interactive or digital means**
- **Nonverbal aspects of business distance communication**
 - Positive language
 - Paralinguistic communication
 - Expression techniques
 - Rhetoric and Persuasion
- **Basic rules of information security and customer/consumer data protection and privacy to be taken into account in distance communication processes**

Evaluation criteria:

- **Naming of two critical factors of business communication via telephone or multichannel platforms**
- **Naming of two nonverbal communication techniques specific to business distance communication**
- **Demonstration of the use of oral communication rules in a telephone communication given scenario**
- **Demonstration of the use of rules of written communication in a given scenario of communication through interactive or digital means (mobile devices, digital platforms and other online channels such as sms, email, chat, social networks, others)**

Products/outputs:

- **Register of the communication established with the customer/consumer**
- **Register of the service provided to the customer/consumer in a technological based information system**

MODULE 2.2
Customer service through interactive or digital means
UC 2

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

Learning objectives:

- ➔ To identify the distance trading and the e-market principles
- ➔ To recognize specific distance trading communication strategies
- ➔ To identify and apply the different phases of telephone customer service
- ➔ To identify and apply the different techniques of omnichannel platforms customer service
- ➔ To identify and apply written communication rules applicable to digital communication channels
- ➔ To use the consultation and registration functionalities of the customer service information system

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Contents:

- **Distance trading – general concepts**
 - Distance trading using the phone
 - Distance trading using digital platforms and channels
 - E-commerce definition and scope
 - E-commerce features
 - Online transactions security
- **E-business – general concepts**

- Definition and scope
- E-business services main features
- **Distance trading communication strategies**
 - Direct marketing through the web
 - Use of digital channels as a marketing strategy
 - Online shops, omnichannel platforms, social media
- **Customer service over the phone**
 - Initial approach
 - Needs assessment
 - E-consumer behaviour analysis
 - Structuring a script of “typified questions”
 - Presentation of adjusted solutions
 - Closing and farewell
 -
- **Customer service through mobile devices, digital platforms and other online communication channels (SMS, email, chat, social media, others)**
- **Customer retention and loyalty strategies**
- **Distance trading legal and ethical aspects**
 - E-commerce websites/online shops pre-contractual information duty
 - Contractual terms regarding sales, delivery and post-sales
 - Modalities of product delivery or service provision
 - Payments means
 - Commercial communication standards of conduct
- **Information system**
 - Functionalities of the customer service platform for inbound operations (voice, Interactive voice response (IVR), email, fax, mail, webchat e Instant messaging (IM) and outbound operations (voice, email, fax, webchat, Instant messaging (IM) and SMS)
 - Query, extract and register functionalities
 - Information security standards
 - Rules and regulations regarding personal data and privacy protection

Evaluation criteria:

- Identification of the characteristics of a given product, its price, pre-contractual and contractual conditions applicable to distance trading operations
- Identification of the phases of telephone customer service
- Naming two written communication rules applicable to writing digital communication channels
- Explanation of two standards of conduct in commercial communication
- Naming the main pre-contractual information duties of e-commerce websites/online shops
- Demonstration of the use of the consultation and registration functionalities of a customer service information system

Products/outputs:

- Register of the service provided to the customer/consumer in a technological based information system

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MODULE 3.2

**Selling through interactive or digital means:
process**

UC 3

**To sell products and services through interactive or
digital means**

Learning objectives:

- ➔ **To apply sales techniques through interactive and digital means**

- ➔ To apply negotiation strategies through interactive and digital means
- ➔ To interpret and apply rules and regulations regarding distance trading
- ➔ To identify means and payment terms applicable to distance trading
- ➔ To interpret and apply rules and regulations concerning the right to information, protection of customer/consumer data and information security
- ➔ To apply customer retention and loyalty strategies
- ➔ To recognize the data query, extraction and registration functionalities of the distance trading information system

Contents:

- **Distance selling techniques**
 - Phases of sales over the phone
 - Phases of sales through omnichannel platforms
 - Use of written communication rules and tools applicable to digital communication channels
 - Use of negotiation strategies
 - Argumentation
 - Handling objections
 - Questioning
 - Positive alternative
 - Price presentation
- **Payment means and conditions**
 - Rules and regulations applicable to distance trading (over the phone, through multichannel platforms)
 - Rules and regulations applicable to products sales
 - Cash sales and payment means
 - Credit sales and applicable conditions
 - Means and methods of payment in distance trading
 - Electronic payment methods and security requirements
 - Frequent fraud situations in distance trading: detection and reporting mechanisms

- **Distance trading legal and ethical issues**
 - General and internal rules and regulations regarding distance trading (regarding pre-contractual information, contractual terms regarding sales, delivery, modalities of delivery, transportation, post-sales, terms and responsibilities)
 - Rules and regulations on personal data protection and customer/consumer privacy
 - Rules and regulations regarding information security
 - Internal rules of the organization regarding information security
 - Rights and duties of e-consumers
 - Ethical behaviour
 - Consumer information standards of conduct and regulations:
 - Limits and mandatory mentions
 - Specifications regarding financial products, insurance, telecommunications, and others
- **Customer loyalty and retention**
 - Definition and objectives
 - The closing sales phase as an important moment of customers retention
 - Mechanisms that affect the relationship with customers and their loyalty
 - Importance of the User Experience (UX) concept
 - Loyalty and retention strategies
 - Customer monitoring and follow up instruments
- **Information system**
 - Functionalities of the distance trading platform for inbound operations (voice, Interactive voice response (IVR), email, fax, mail, webchat e Instant messaging (IM) and outbound operations (voice, email, fax, webchat, Instant messaging (IM) and SMS)
 - Query, extract and register functionalities

Evaluation criteria:

- Identification of the sale over the phone phases
- Naming of the sales through multichannel platforms phases
- Description of two central arguments for the sale of a given product
- Explanation of two examples of rules and/or regulations applicable to distance trading
- Identification of two security requirements related to electronic payment means
- Exemplification of at least three e-consumer rights (regarding topics such as right to information, personal data protection and information security)
- Application of customer loyalty strategies in a provided distance selling scenario / context

Products/outputs:

- Product presented to the customer in a distance trading context (over the phone or through omnichannel platforms)
- Sales pitch/sales arguments.
- Rules and regulations applicable
- Sales register in a technological based information system

MODULE 3.3

Selling through interactive or digital means: documentation

UC 3

To sell products and services through interactive or digital means

Learning objectives:

- ➔ To identify the e-commerce principles
- ➔ To identify the sales documentation applicable to distance trading
- ➔ To identify accounting standards applicable to distance trading
- ➔ To identify and apply procedures for the issuing and management of distance trading supporting commercial documentation
- ➔ To use the functionalities of the billing and commercial documentation system
- ➔ To use the functionalities of the distance trading information system

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Contents:

- **Distance trading – general concepts**
 - Distance trading using the phone
 - Distance trading using digital platforms and channels
 - E-commerce definition and scope
 - E-commerce main features
- **Commercial/business law**
 - Definition
 - Rules and regulations applicable to issuing of sales documentation
 - Rules and regulations applicable to distance trading
- **Commercial/business documentation**
 - Commercial contracts

- Buyer and seller contractual obligations
- Specificities of distance trading
- Procedures and applicable legal requirements
- **Administrative billing procedures**
 - Accounting standards applicable to distance trading
 - Issuing sales supporting documentation
 - Issuing accounting related documentation
 - Procedures for updating current accounts
 - Issuing of account statements
- **Computer system for billing and issuing of commercial documentation**
 - Functionalities for the sales registration, issuing of sales supporting documents, accounting supporting documents, shipping or transport document, others
- **Information system**
 - Functionalities of the distance trading platform for inbound operations (voice, Interactive voice response (IVR), email, fax, mail, webchat e Instant messaging (IM) and outbound operations (voice, email, fax, webchat, Instant messaging (IM) and SMS)
 - Query, extract and register functionalities
 - Information security standards

Evaluation criteria:

- **Identification of the main distance trading commercial and accounting supporting documents**
- **Explanation of two examples of rules and / or regulations applicable to distance trading**
- **Explanation of the main accounting standards to be respected when issuing commercial documentation**
- **Demonstration of the use of the main functionalities of the computer system for billing and issuing of commercial documentation (order, contract, invoice, receipt, credit note, shipping or transport document, others)**
- **Demonstration of the use of the functions of query, extraction and registration in the distance trading information system**

Products/outputs:

- **Commercial documentation issued**
- **Registers done in the computer system for billing and issuing of commercial documentation (order, payment, etc)**
- **Sales register in a technological based information system**
- **Rules and regulations applicable**

Austria

MODULE 4/5.1
E-Commerce Basics
UC 4+5

To do the post-sale monitoring through interactive or digital means
To handle and monitor customer complaints through interactive or digital mean

Learning objectives:

- ➔ **Recognize general e-commerce basics**
- ➔ **Identify the role and function of e-commerce**
- ➔ **Use interactive and digital media to increase processes**
- ➔ **Identify the e-commerce principles**
- ➔ **Identify the critical factors of the commercial communication on the internet**
- ➔ **Interpret and apply standards and legal regulations related to information security**
- ➔ **Create, edit and manage customer data in a mail-application**

Contents:

- **Definition of e-commerce**
- **Types of e-commerce**
- **Connected commerce**
- **Fields of action in e-commerce**
- **Function und role of e-commerce**
- **Legal regulations in e-commerce**
- **Safer internet**
- **Rules for using e-mail within commercial processes**
- **Mail-applications to create, edit and manage customer data**
- **Tactics for successful web usage**
- **Tips for smarter, more efficient Internet searching**
- **Appropriate and respectful communication on the Internet (netiquette)**
- **Structure and use of databases**

Evaluation criteria:

- **Recognition of contexts in e-commerce**
- **Compliance of legal regulations**
- **Identification of useful procedures to carry out post sales monitoring, customer satisfaction evaluation and complaints management through digital or interactive means**
- **Adequate communication with the customer during the entire process in post-sales monitoring, customer satisfaction evaluation and complaints management**
- **Explain rules of conduct of commercial communication**
- **Demonstrate the use of functions of consultation and registration of information in the computer system**

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Products/outputs:

- **Documentation of delivery**
- **Registration of post-sales service performed**
- **Documentation regarding the service provided (refund, exchange, request for technical assistance, other)**
- **Documentation of customer satisfaction evaluation**
- **Documentation of the entire complaints process**

MODULE 4.2
Post-sales follow up through interactive or digital means
UC 4

To do the post-sale monitoring through interactive or digital means

Learning objectives:

- ➔ Identify and apply service procedures related with post-sale
- ➔ Identify and apply procedures for receiving and routing products
- ➔ Interpret and apply rules and regulations on exchange , withdrawal, guaranty and warranty
- ➔ Apply the distribution principles

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Contents:

- **Making a delivery from a purchase order**
 - Availability of goods
 - Analysing and application of product delivery procedures to customers
 - Organisation of ordered goods
 - Compilation of delivery
 - Packing the goods
 - Addition of delivery note and possibly bill
 - Issuing of documents (return note, credit note, transport guide, ...) for exchanges and refunds
 - Shipping
 - Information of customers about shipping date, status, dispatch, and if necessary of irregularities

- **Regulations and transport norms basic**
- **Logistic distribution basics**
- **Procedures for exchanging and refunding products**
 - Identification of the post-sale procedures
 - Research whether alternative product exists
 - Offering alternative or similar product
- **Legal regulations for exchange , withdrawal, guaranty and warranty**
 - Check whether refunding is lawful (goods damaged? /meet the deadline)
- **Support and technical assistance**
 - Regulations and norms related with guarantees, support and technical services

Evaluation criteria:

- **Compilation of a delivery according to the order received**
- **Explain the procedures for proper shipping of the delivery**
- **Identification of steps to refund/exchange products taking into account all relevant legal regulations**

Products/outputs:

- **Shipped products**
- **Documentation of delivery**
- **Registration of post-sales service performed**
- **Documentation regarding the service provided (refund, exchange, request for technical assistance, other**

MODULE 4.3

Customer satisfaction assessment

UC 4

To do the post-sale monitoring through interactive or digital means

Learning objectives:

- ➔ Identify and apply the customer satisfaction assessment techniques
- ➔ Recognize “Relationship Marketing” - Basics
- ➔ Recognize principles of Quality Customer Service
- ➔ Apply strategies for data evaluation of the purchasing behaviour and satisfaction of regular customers
- ➔ Apply strategies for data evaluation with respect to current trends and customer’s needs
- ➔ Apply tools for data collection, analyses and customer feedback
- ➔ Identify means of customer communication (wording, behaviour, netiquette)
- ➔ Identify strategies and aspects of dialogic communication
- ➔ Apply customer loyalty strategies and tools

Contents:

- **“Relationship Marketing” - Basics**
- **Principles of Quality Customer Service**
- **Strategies for data evaluation of the purchasing behaviour and satisfaction of regular customers**
- **Strategies for data evaluation with respect to current trends and customer’s needs**
- **Tools for data collection, analyses and customer feedback**
- **Means of customer communication (wording, behaviour, netiquette)**
- **Strategies and aspects of dialogic communication**
- **Customer loyalty strategies and tools**
 - Customer-oriented email (Newsletter)
 - Vouchers (Easter, Christmas, birthday,..)
 - Events

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Evaluation criteria:

- **Application of procedures for evaluating customer satisfaction**
- **Use customer loyalty strategies according to the defined communication plan**

Products/outputs:

- **Documentation of customer satisfaction evaluation**

MODULE 5.2
Complaints management through interactive and digital means
UC 5

To handle and monitor customer complaints through interactive or digital means

Learning objectives:

- ➔ Identify and apply complaint management strategies
- ➔ Apply legal regulations
- ➔ Identify and apply complaint management procedures
- ➔ Apply techniques of communication through interactive and digital means

Contents:

- **Complaint management principles**
 - Complaint management strategies
 - Solution or forward of complaints taking into account all relevant legal regulations
- **Legislation and regulations concerning complaints (purchase contract, buyer and consumer protection, deadlines for processing, ...)**
- **Legal basis in terms of guarantee and warranty**
- **Communication and interpersonal relationship through interactive and digital means**
 - Assertive communication techniques
 - Strategies of emotional control

Evaluation criteria:

- Identification of the customers' requests/complaints
- Identification of steps to resolve/forward complaints taking into account all relevant legal regulations
- Adequate communication with the customer during the entire complaints process
- Explain the critical factors of complaint management
- Identification of the main regulations applicable to complaints management

Products/outputs:

- Documentation of the entire complaints process

Spain

MODULE 6.1

E-consumer behavior and needs

UC6

To formulate e-marketing plans in collaboration with the marketing manager/director

Learning objectives:

- ➔ Identify the needs of the e-consumers to design an effective marketing strategy
- ➔ Define the key factors that influence e-consumer behavior
- ➔ Recognize the risks of the on-line commerce that affect the buying decision
- ➔ Report e-consumer needs and expectations

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Contents:

- **Factors that motivate consumers to buy on Internet**
 - Internal factors
 - External factors
- **Risks of the on-line commerce that filter the buying choices.**
 - Security issues: protection of personal data, payment data
 - Privacy issues: use of the personal data
 - Measures to improve the trust in the on-line commerce
- **E-consumer profile**
 - Who buys on the internet?
 - Why do they buy on-line?
 - What do they buy?

- How often do they buy?
- To whom do they buy?
- How do they buy?
- How do they pay?
- **Trends and challenges of the internet consumption**

Evaluation criteria:

- **Explanation of the sources of information used and the techniques of analysis of data applied**
- **Identification of the factors that motivate consumers to buy on-line**
- **Identification of the risks of the on-line commerce and the measures to overcome or minimize these risks**
- **Description of on-line consumer characteristics**

Products/outputs:

- **Report about consumers behavior and needs in the digital market**

MODULE 6.2

Market research for the digital commerce of products and services

UC6

To formulate e-marketing plans in collaboration with the marketing manager/director

Learning objectives:

- ➔ Define the sources of information for the e-market research of products and services
- ➔ Differentiate the product and define the niche market
- ➔ Categorize the current and potential e-clients and how they behave when they buy on the Internet
- ➔ Identify competitors that operate in the on-line market of the product
- ➔ Analyze the information obtained in the research and report the results

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Contents:

- **Definition of the market research objectives**
- **Research design**
 - Preparation of research
 - Planning the research process
- **Sources of information**
 - Internal and external
 - Primary and secondary
- **Data collection: methods and tools**
 - Collecting information about the company
 - Collecting information about the sector of activity
 - Collecting information about the competitors: benchmarking

- Collecting information about the clients
- **Data analysis: techniques**
 - Identify the key factors for the digital commerce of a product or service
 - Strengths: characteristics of the product/service that are an advantage in relation to others
 - Weaknesses: characteristics of our product that are a disadvantage in relation to others
 - Opportunities: external factors that could be exploited as a competitive advantage
 - Threats: external factors that could cause troubles for the on-line selling of our product/service
- **Report of results**

Evaluation criteria:

- **Explanation about the steps to follow to design a market research**
- **Description of the sources of information for the e-market research of a product/service and its classification**
- **Identification of the methods and tools for the data collection**
- **Identification of the techniques quantitative and qualitative for the analysis of data available**
- **Relate how to report the results of a market research to the client in a structured way using a SWOT method**
- **Relate how to communicate the main conclusions of the market research to the client**

Products/outputs:

- **Design of the research**
- **The SWOT Matrix with the results of the market research**
- **Conclusions of the market research**

MODULE 6.3
E-marketing planning

UC 6
To formulate e-marketing plans in collaboration with the marketing manager/director

Learning objectives:

- ➔ Identify the stages of e-marketing planning
- ➔ Recognize the main internal and external factors that influence the marketing decisions
- ➔ Use techniques and tools of planning e-marketing
- ➔ Distinguish the variables of the e-marketing mix

Contents:

- **Stages of the e-marketing planning process.**
- **State of the situation:**
 - Analysis of internal factors
 - Analysis of the external factors
 - Main threats and opportunities of the product/service in the digital market
- **E-marketing planning techniques and tools**
- **E-marketing objectives according to the organizational goals and resources**
- **Planning of the e-marketing strategy**
 - Identification of the target market: segmentation
 - Identification of the target customers: targeting
 - Positioning of the product/service in the e-market
- **Design of the e-marketing strategy**
 - The e-marketing mix variables: price, product, place and promotion

- Adaptation of these variables to the digital marketing context
- Design of the e-marketing mix strategies and tactics to meet the foreseen objectives
- **Development of the e-marketing budget**

Evaluation criteria:

- **Identification of the stages of the e-marketing planning process**
- **Explanation of the internal and external factors that can influence the e-marketing decisions.**
- **Description of the e-marketing planning techniques and tools**
- **Description of the marketing mix variables and their adaptation to the digital marketing.**
- **Identification of the models of strategies and tactics to design an e-marketing Plan**
- **Explanation of how budgeting an e-marketing plan.**

Products/outputs:

- **E-marketing plan**

MODULE 7.1

Organization of e-marketing activities: Action Plan

UC 7

To implement and monitoring e-marketing plans in collaboration with the marketing manager/director

Learning objectives:

- ➔ Use online planning methods and tools
- ➔ Allocate resources and responsibilities to each action
- ➔ Integrate the planning instruments to set the Action plan
- ➔ Use methods for tracking progress

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Contents:

- **Planning the day-to-day activities/strategies to implement the e-marketing plan.**
 - Planning methods and tools
 - Break down structure of e-marketing activities: WHAT TO DO- Activity plan
 - Activities schedule: WHEN TO DO IT-Time plan
- **Allocation of resources to implement the planned activities**
 - Activities Budget: RESOURCES NEEDED- Financial plan
- **Define roles and assign responsibilities**
 - E-marketing tasks assignment.
 - Roles and responsibilities in the implementation of e-marketing activities - WHO IS GOING TO DO IT – e-marketing team
- **Integration of the different planning instruments to set the e-marketing Action Plan**
- **Review of activities**

- **Methods and tools to track periodically the progress of the Action Plan and to know the STATUS OF THE ACTIVITIES**

Evaluation criteria:

- **Identification and classification of the activities foreseen in the e-marketing plan**
- **Explanation of how to plan activities, estimate time and assign financial and human resources to implement the e-marketing plan**
- **Description of the planning mechanisms and tools to design the e-marketing Action Plan**
- **Explanation of the methods and tools to review periodically the Action plan**

Products/outputs:

- **Action Plan**

MODULE 7.2

Developing e-marketing plans

UC 7

To implement and monitoring e-marketing plans in collaboration with the marketing manager/director

Learning objectives:

- ➔ Identify the digital media to use for developing an e-marketing plan
- ➔ Compare and select the digital channels and tools to develop an e-marketing plan
- ➔ Organize the technical, human and material resources to develop the activities of the marketing plan
- ➔ Use managing techniques and tools to implement an e-marketing plan

Contents:

- **Digital communication and digital media**
- **The main digital channels to promote the on-line selling of products and services**
 - Online Display Advertising
 - Video
 - Mobile marketing
 - Responsive Websites
 - E-mail Marketing
 - Social Media Marketing
 - Affiliate Marketing
- **E-marketing tools to improve the results of the e- marketing actions**
 - Online Advertising tools
 - Online Distribution tools, via third party or directly
 - Online Payment Processing tools

- On-line customer service tools
- Content creation and tools
- Social media tools
- E-mail tools
- Search engine marketing (SEM) as Google AdWords
- Search Engine Optimization (SEO) tools

- **Allocation and organization of available resources to implement e-marketing activities**
- **Management of the e-marketing plan: work program and budget planning**

Evaluation criteria:

- **Explanation of the sequence of actions to implement an e-marketing plan**
- **Description of the use of digital media in the e-marketing campaigns**
- **Description of digital channels and tools for e-marketing**
- **Identification of the main process and tools to manage a marketing plan**

Products/outputs:

- **E-marketing Management Plan**
- **Reporting of the e-marketing plan implementation.**
- **Change system log with adaptation of the e-marketing plan during the implementation process**

MODULE 7.3
Monitoring and evaluation of e-marketing plans

UC 7
To implement and monitoring e-marketing plans in collaboration with the marketing manager/director

Learning objectives:

- ➔ Define the digital tools for the monitoring and evaluation of the e-marketing plan
- ➔ Identify indicators for results
- ➔ Apply data analysis techniques
- ➔ Detect deviation and implement improvement measures in the marketing activities
- ➔ Report the level of achievement of the objectives defined in the marketing plan

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Contents:

- Differences between monitoring and evaluation activity.
- Objectives of the monitoring and evaluation activities.
- Design of the monitoring and evaluation plan: digital methods and tools.
- Indicators of performance (KPI's) and indicators of results to assess the effectiveness of the e-marketing actions, related to:
 - Sales
 - Market share
 - In the retention and increase of customers
 - In the positioning
 - In the branding
- Data analysis techniques and tools:
 - Qualitative and quantitative techniques
 - Economic analysis as cost-benefit analysis

- Overview of the Cost-Effectiveness Analysis
- Analysis for Search Engine Optimization (SEO)
- Statistical analysis as Google Analytics
- Web Analytic Tools

- **Report of the monitoring processes: deviations detected and proposals to promote continuous improvement.**
- **Report of the evaluation activity: actions with positive and negative results and recommendations for future actions.**

Evaluation criteria:

- **Identification of methods and tools to control and monitoring the implementation of e-marketing activities**
- **Identification of methods and tools to evaluate the results of the e-marketing plan**
- **Description of main indicators of performance and results of the e-marketing activities**
- **Explanation of the different techniques and tools for the digital analysis of marketing data**
- **Description of the key aspects to report the results of the monitoring and evaluation activities**

Products/outputs:

- **Control and monitoring plan**
- **Progress monitoring reports**
- **Reports of the deviations detected and the preventive/corrective actions proposed**
- **Evaluation of results report**

5. Selection of modules for detailed development

Partners selected one training module for detailed development and testing, named the criteria and justified their decision.

They elaborated a detailed version (determine durations, identify resources..) in their national language.

Translations into English will be available to foster its use at European level.

Portugal:

MODULE 1.1

“Commercial prospection and sales planning through interactive or digital means”

Selection criteria

Relevance: Prospection is the beginning of the “sales cycle” so it makes sense to start from the beginning; respond to training needs as one of the main concerns of companies from the sector is to “find” customers and to learn more about how to find them using interactive and digital means

Sustainability: possible future use in qualifications from the commerce sector, at national level

Added value: fewer offers on online courses on prospection using interactive and digital means

Adaptability to e-learning format: it is reasonable to consider that the learning objectives defined to this unit are deemed to be reached using an e-learning environment

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Austria:

MODULE 4/5.1

“E-Commerce Basics”

Selection criteria

Sustainability: future use of the course at regional/national level and possible inclusion in the regional/national training system.

This decision is based on priority required skills during the research phase in close cooperation with relevant stakeholders from the sector:

Employer and stakeholder/political actors had a strong reference to classic e-commerce trainings as “general e-commerce skills” and “role and function of e-commerce”. This corresponds with the feedback from the employees, more than 3/4 of the respondents miss trainings in these areas or do not know them.

- 60% of the surveyed VETs do not offer trainings in “general e-commerce skills”, 45% not in “role and function of e-commerce”.

- Trainings in the field of “new technological applications” are also mentioned as necessary by employers and
- stakeholder/political actors. Stakeholder valued this content as most important.
- Faced with the challenge of changed behavior and needs of customers, trainings concerning online consumers, their behavior
- and motivation, purchase, marketing and communication via social media, are highly required training contents from the
- perspective of employers (70% - 80%) and stakeholders (70%). From the perspective of employees these trainings are missed or
- not known up to 85%. 62,5% of the surveyed VETs do not offer trainings with these contents.
- All groups reported that skills concerning the “use of e-commerce and social media to increase sales” are of high importance,
- employees miss trainings with these contents to a high extend or do not know it (almost 90%).

*WP2 “National Report”
Skills Gap Study
December 2015*

Spain:

MODULE 7.2

“Developing e-marketing plans”

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Selection criteria:

Respond to the training needs in the commerce sector.

Sustainability: Ensure the future use of the course at regional/national level and possible inclusion in the regional/national training system.

According to the opinion of the experts consulted, this proposed module assures the maximum practical application to the reality of the companies in the commerce sector, since it includes the selection of channels of distribution and digital tools necessary to develop an e-marketing plan in the most effective way.