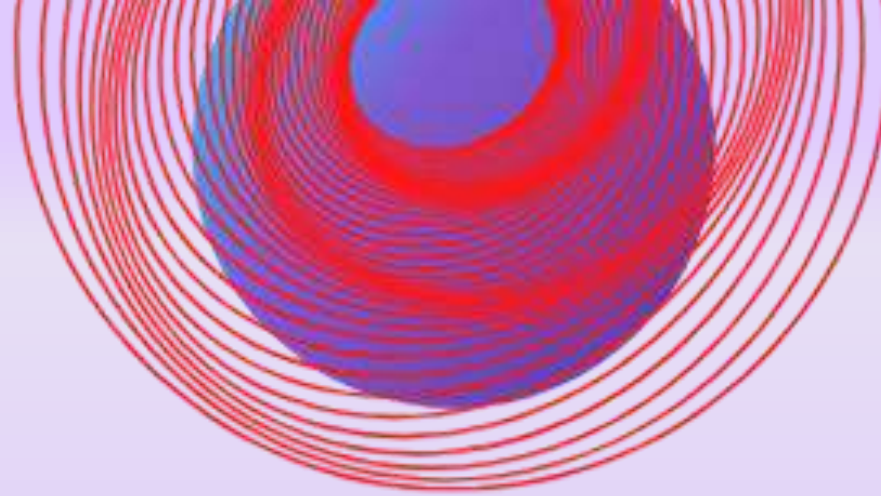




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CONSULTANT TRAINING TOOLKIT

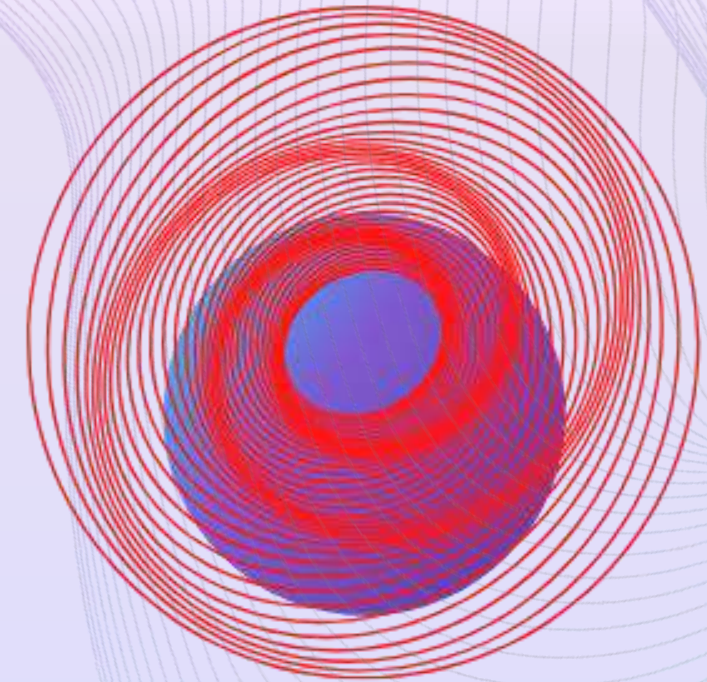
CHAPTER 4

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CONSULTANT TRAINING TOOLKIT

CHAPTER 4

Using Platforms

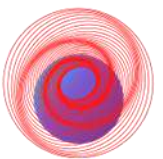


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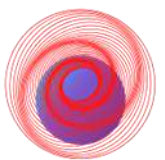
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- 2. Social media platforms*
- 3. Knowledge & learning platforms*
- 4. Marketing automation platforms*
- 5. Communication & collaboration platforms*
- 6. Work management platforms*
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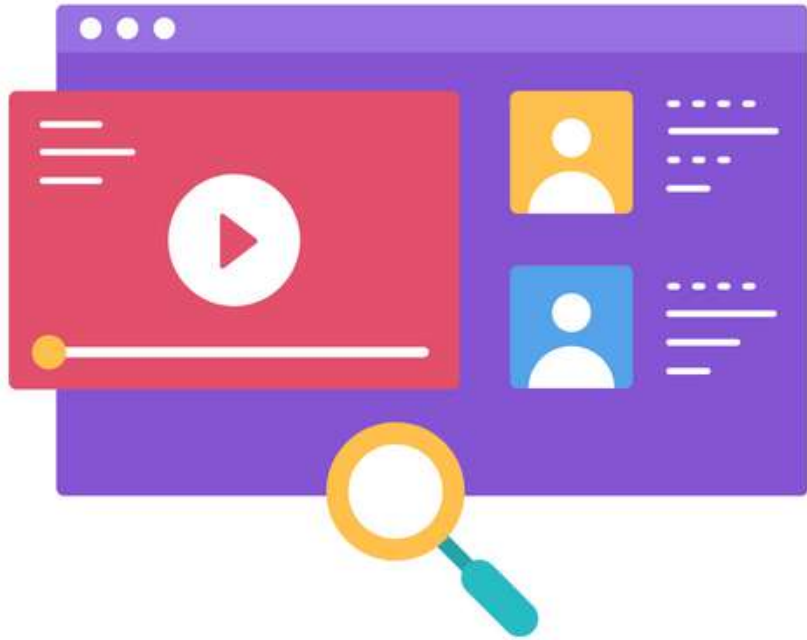
1. Definition & types of online platforms



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What is an Online Platform?



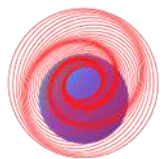
- We have **various definitions** of online platforms:
- Scientific definition: **digital service that facilitates interactions between two or more distinct but interdependent sets of users** (whether firms or individuals) **who interact through the service via the internet** (OECD 2019).
- Conceptually: online platform is a **tech-based business model**. Their mission is to **connect interests and people**, and **promote valuable interactions** between those involved.
- In practice: digital platforms act as **online facilitators of relationships** that already take place offline, but which are now **largely driven and boosted by digital mechanisms**.



Purpose of an Online Platform



- Online platforms **intermediate information and communication flows on the internet.**
- They **support so many of our daily activities** that we have become dependent on them in our personal and professional lives.
- **Examples:** buying and selling goods and services, searching for the information online, keeping in touch with each other.
- **We use them for:** entertainment, news, transportation, accommodation, finding jobs and employees, finding apps and for many other purposes.



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Why Online Platforms for small businesses?

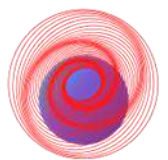


Reasons why small businesses should use online platforms:

- To build their online presence & create their brand voice (social media platforms)
- To simplify the day-to-day operations, be more productive & manage all of the activities (work management platforms)
- For effective communication & collaboration
- To simplify and automate their marketing activities
- To acquire information & knowledge



2. Social media platforms



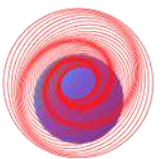
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Top 10 Social Media platforms in 2022



	Social Media Platform	Monthly Active Users (MAU)	Revenue	Launched
1	Facebook	2,9 billion	\$85.96 billion	2004
2	YouTube	2,2 billion	\$28.8 billion	2005
3	WhatsApp	2 billion	\$5.5 billion	2009
4	Instagram	2 billion	\$24 billion	2010
5	TikTok	1 billion	\$11 billion	2016
6	Snapchat	538 million	\$1.06 billion	2011
7	Pinterest	444 million	\$575 million	2005
8	Reddit	430 million	\$289.9 million	2010
9	LinkedIn	250 million	\$12. 4 billion	2006
10	Twitter	217 million	\$5.42 billion	2003



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Why do we use social media platforms?



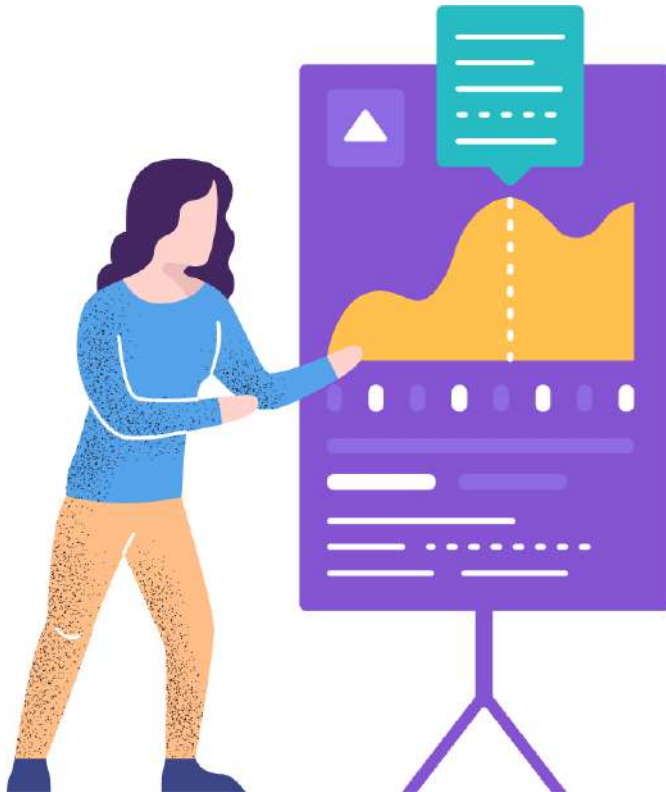
- **INDIVIDUALS** use them to connect with new and existing friends, family, colleagues, and businesses.
- **BUSINESSES** use them to connect with their customers, to increase brand recognition and encourage brand loyalty.
- **Social media marketing helps promote a brand's voice and content.** It can help make a company more accessible to new customers and more prominent for existing ones.
- Social media platforms have **different purposes!** We should be careful which platform to choose.



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How to choose a social media platform if you are a small business?



- **Start with your audience:** who is your online persona? Where is your audience active?
- **Consider your company:** do you need a visual, professional, entertaining presentation?
- **Research your competitors** and others in your industry: what do they use? Is it working?
- **Align with your overall social media marketing goals:** would you like to share beautiful pictures of your products or offer customer support?
- **Understand the different platforms:** each has its own personality and ways of communicating.
- **Keep in mind your available resources:** limit your channels to what you can actually do!



Challenges and risks of social media platforms



- **HATE SPEECH:** how to reduce the amount of hate speech
- **FAKE NEWS:** can we trust the information we read on the social media?
- **INVADING PRIVACY:** social media platforms are tracking our online activities, harvesting personal information, even without our permission
- **IDENTITY THEFT:** be careful when and where to share your personal information
- **ASTRO TURFING:** hiding the real authors of a message or an organization – fake profiles, trolls
- **CYBER BULLYING:** bullying over digital devices, over the internet; especially young people



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3. Knowledge and learning platforms



Why knowledge and learning platforms?



- A learning platform is a **type of software that enables teachers to create and deliver courses online.**
- It can be **used for education and training, e-learning or digital learning in companies.**
- **Benefits for educators:** a learning platform can be a **way to create and deliver courses online without having to worry about the technical aspects** of setting up a website or hosting courses.
- **Benefits for learners:** a learning platform provides a **convenient way** to access courses and training materials from **anywhere in the world, anytime you want.**
- **Benefits for small business:** acquire new knowledge to be more successful



Examples of best learning platforms



- Coursera - partners with over 200 top universities and companies to produce the best courses across a wide variety of subjects
- Thinkific - one of the best platforms to create learning products and organize a custom learning experience for your team
- LinkedIn Learning – business & technology courses
- Skillshare – creative skills courses
- edX - real university courses online
- Udemy - largest online learning platform for niche courses, almost every topic possible!
- Treehouse - web development and programming courses
- MasterClass – courses by celebrities
- ... and many more!!!

How to choose the right learning platform?



IF YOU WANT TO LEARN SOMETHING:

- What do you want to learn? Which topic?
- Are the tutors/teachers reliable? What are their qualifications and experience?
- Does it provide an engaging learning experience? Or is it just a simple one-way street?
- Is it easy to use and navigate? Is it secure?

IF YOU ARE A COURSE CREATOR:

- Are you capable of doing it yourself, on your own website? This can be quite expensive, but you have complete control over everything.
- If not, which existing learning platform is best for you? Check the reviews online!



4. Marketing automation platforms



Why marketing automation platforms?



- Marketing automation can be used if you **do not want to spend your valuable time to send emails to each customer directly.**
- Marketing automation **uses software to automate monotonous marketing work.**
- It can **automate repetitive tasks** such as: email marketing, social media posting, and even ad campaigns.
- Marketing automation can **give you a richer, more detailed picture of potential customer behavior.**
- You can **collect valuable data** which you can use in the future.



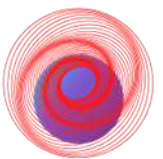
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Best marketing automation platforms for small businesses



- Small businesses can choose among (almost) **free and easy-to-use marketing automation tools**. Some good and affordable examples:
- **MAILCHIMP**: easy to use, free for up to 2000 subscribers, includes analytics & integrations
- **MAILERLITE**: free for up to 1000 subscribers, lots of features
- **SENDY**: good and cheap solution for sending a high number of emails
- **More sophisticated platforms (paid)**: HubSpot Marketing Hub, ActiveCampaign, Klaviyo, SharpSpring, Sendinblue, Omnisend...



How to use marketing automation



- You always have to be careful about **GDPR – General Data Protection Rules**: you cannot send emails without permission from the subscribers
- **Create automation workflows**: create workflows that are personal and adaptable to your customers' needs
- **Integration**: connect all the data from your frequently used platforms to deliver more relevant marketing
- **Analytics**: use the collected data and reporting tools to monitor trends, track performance, and create better campaigns that reach more customers.
- Use the collected data for **remarketing and retargeting**.



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5. Communication & collaboration platforms



Why communication and collaboration platforms?



- A collaborative platform is a **virtual workspace** where resources and tools are centralized with the aim of **facilitating communication and personal interaction in corporate project work**.
- Can be used for **document sharing** (spreadsheets, presentations, text files, etc.)
- Can be used for **online meetings**
- Good for exchanging information and **communication about initiatives in progress: chat applications**.
- For work collaboration, **various project management tools** can be used.



How to share documents easily

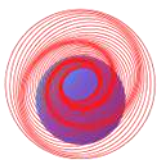


UPLOADING TO A CLOUD STORAGE & SHARING –
you can choose one of the following cloud solutions:

- **Google Drive** - file storage & synchronization service
- **Dropbox** – file storage & synchronization service
- **OneDrive** – file storage & synchronization service

SENDING FILES DIRECTLY

- **WeTransfer** – for sharing your files around the world: free for files under 2 GB. Easy to use, excellent for beginners.



Virtual meeting software



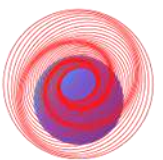
- There are many different examples of **virtual meeting software**, also called **online meeting platforms**. Best and easiest to use for small businesses:
- **ZOOM**: easy to use, inviting participants simply by URLs. Free and paid versions.
- **GOOGLE MEET**: If data security is a priority for your business, then Meet is right for you, as long as everyone has a Google Account.
- **MS TEAMS**: Microsoft Teams is a workspace for real-time collaboration and communication, meetings, file and app sharing.



Team Communication - Chat applications



- For a daily and **immediate communication** among team members, you can use one of the **chat applications**. They are all excellent for remote work!
- **SLACK** is an excellent choice for small businesses, perfect for remote work
- **GOOGLE CHAT**: excellent for Google users, a communications service that enables text, voice, or video chats, either one-on-one or in a group.
- **WhatsApp**: a simple tool, easy to use
- **Viber**: also a simple tool, easy to use



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Project Management software



- In order to manage projects in small business effectively, we can use many **different project management tools**. Best and **simplest tools for small businesses**:
- **Trello**: Simple, flexible, and powerful tool. All it takes are boards, lists, and cards to get a clear view of who's doing what and what needs to get done.
- **Asana**: helps you manage complex work easily, connect what needs to get done, who's doing it, and by when, using cards, boards, lists.
- **Basecamp**: a simple, and remarkably effective, project management platform. Also uses boards, cards, lists,...



6. Work automation platforms



Why work automation platforms?



- Workflow automation is the process of **using rule-based logic to launch a series of tasks that run on their own without any human intervention**. After you establish the rules and logic, automated workflows can send emails, set up reminders, schedule tasks, trigger drip campaigns, and more — all without anyone in your team touching a single button.
- **Almost every task in your business can benefit from workflow automation**. Whether it's marketing, human resources, or finance, the technology can help you work smarter, not harder
- Workflow automation is **excellent for businesses that want to scale and grow**: by letting technology complete manual tasks, you can effectively grow your business without any growing pains.



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Best work automation platforms



- There are some **excellent tools for small businesses** to make your work much easier:
- **Zapier**: a simple automation platform, connecting many applications (gmail, Google sheets, Slack, Facebook, Instagram, Trello, MailChimp,...)
- **Buffer**: it makes it very easy to automate as much of your social media marketing efforts as you need to.
- **Grammarly**: it will save you from those basic spelling and grammar mistakes in English that can leave people questioning the competence of your business.
- **Calendly**: it helps people book an appointment directly on your website, without the need of emailing to find the perfect time.

Time to think...



After an overview of the main online platforms that can help your business, reflect on the following:

- **Do you already use any of these tools?**
- **Do you find any of the mentioned tools interesting?**
- **Are you planning to start using any of them in your business?**
- **Which tools and why?**

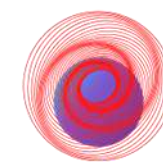


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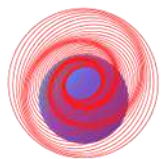


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