



PR1- A2: Consultant Training Toolkit

Chapter no.: 4

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1.0 Information about Chapter

Chapter's title: Online Platforms
Duration: 3 hours
Short introduction to the chapter: Online platforms, intermediate information and communication flow on the internet. Online platforms, are also key enablers of digital trade across the single market and the globe. Moreover, they increase consumer choice and convenience, improve the efficiency and competitiveness of industry, and can enhance civil participation. They support so many daily activities that we have become dependent on them in our personal and professional lives. We can use them for entertainment, news, transportation, accommodation, finding jobs and employees, apps, and many other purposes. This chapter describes the most important platforms for small businesses and focuses on how to make professional life easier with the help of online platforms.
Methods of instructions: <i>Trainers will use the following methods:</i> • <i>presentation</i> • <i>discussion</i> • <i>group work</i> • <i>brainstorming</i>
Prerequisites of the students: <i>Specific prior knowledge is unnecessary, and basic IT skills are welcome.</i>
Learning aims and Objectives:



This subject is very important as it helps small business owners identify how to make their professional life easier and how to do more with fewer working hours if they work smart.

Learning objectives: the chapter materials will guide the learner through the leading available online platforms:

- social media platforms,
- knowledge & learning platforms,
- marketing automation platforms,
- communication & collaboration platforms,
- work management platforms.

We will discuss why we should use them and which platforms are the best and the most convenient for small business owners.

Learning Outcomes Covered:

- the learners will be able to define the online platforms they will use in the future;
- they will identify the possible digital solutions to implement in their business;
- they will be able to analyze and evaluate different possibilities in the market.

Skills and Competences:

- Personal mastery: learning skills, flexibility, adaptability;
- Digital IT skills: digital marketing, business digitalization, social media, digital communication;
- Management: management skills, risk management and planning;
- Communication: general communication, leadership, and communication with employees.



2.0 Information about each individual subchapter

Subchapter title: **Definition & types of online platforms and their purposes**

Short introduction to the subchapter:

In this subchapter, we will explain what online platforms are, which types of platforms exist, and the primary purposes of each type of platform.

We will address why every small business should use at least some online platforms.

Definition & types of online platforms and their purposes

Online platforms, intermediate information and communication flow on the internet.

Conceptually, digital platforms are tech-based business models. Their mission is to connect interests and people and promote valuable interactions between those involved.

Therefore, in practice, digital platforms act as online facilitators of relationships that already take place offline, which are now largely driven and boosted by digital mechanisms.

They are also key enablers of digital trade across the globe. Moreover, they increase consumer choice and convenience, improve the efficiency and competitiveness of industry, and can enhance civil participation.

They support so many daily activities that we have become dependent on them in our personal and professional lives.

We can use them for entertainment, news, transportation, accommodation, finding jobs and employees, apps, and many other purposes.

The benefits to our economy and society are so significant that the most successful online platforms have attracted hundreds of millions or even billions of users, making them the most frequently visited websites worldwide.

Some examples of excellent (and huge in numbers) online platforms are Amazon, Alibaba, Apple, Fiverr, GitHub, Uber, Booking.com, Airbnb, Kickstarter, and Wikipedia, along with all major social media platforms like Facebook, YouTube, Instagram, TikTok, ...

Although there are many different types of online platforms, in these materials, we will mainly concentrate on those platforms which can be the most useful for small business owners:

- Social media platforms
- Knowledge & learning platforms
- Marketing automation platforms
- Communication & collaboration platforms
- Work management platforms.



Subchapter title: **Social media platforms**

Short introduction to the subchapter:

This subchapter will discuss the leading social media platforms available now. We will provide an overview of the most used platforms, define the characteristics of each platform and explain which platform to use for different purposes if you are a small business owner.

Social media platforms

There are many different reasons why we use social media platforms nowadays.

We as individuals use them to connect with our new and existing friends, family, colleagues, and businesses.

On the other hand, businesses use them to connect with their customers, 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 to existing ones.

Many small businesses still think that using social media platforms is only for the big players - the big companies. This is false because a small business can benefit significantly from the intelligent use of social media platforms.

But what about choosing the right platform for your business? Social media platforms have different purposes, and we should be careful about which platform to choose.

Some essential tips for choosing the right social media platform for your business are the following:

Start with your audience: who is your online persona? Where is your audience active? Building your online persona is a crucial step in online marketing. Your online persona should ideally be described in all detail, which means:

- Gender
- Age
- Education
- Interest Affinities
- Area of residence
- What is their go-to online place (Facebook, Google, YouTube,...)
- Jargon/Slang appropriate for them
- Primary Concerns and Needs
- Description.

For instance, if you want to reach people in the age group of 60+ years, you will not be able to find them on TikTok or Snapchat, so you would probably need to go to Facebook.



Consider your company: do you need a visual, professional, entertaining presentation? For visual displays, Instagram is perfect. For more serious content, you could use LinkedIn. For short, fun stuff for young people, TikTok would be ideal.

Research your competitors and others in your industry: what do they use? Is it working? If something works great for your competitors, it will probably also work for you.

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 personality and ways of communicating.

You should always keep your available resources in mind: limit your channels to what you can do! The worst thing to do is to open five different channels with no time to manage them. It is much better to have only one (or maybe two) and manage these two in detail.

Regarding social media platforms, there is one more thing to have in mind lately: there are numerous problems and challenges, for instance:

- Hate speech: how to reduce the amount of hate speech?
- Fake news: can we trust the information we read on social media?
- Invading privacy: social media platforms are tracking our online activities and personal harvesting 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
- Cyberbullying: bullying over digital devices, over the internet, especially among young people

You should always act appropriately and be careful about what to do on social media.

Subchapter title: **Knowledge & learning platforms**

Short introduction to the subchapter:

This subchapter will discuss the main knowledge and learning platforms. We will look at the most used platforms and their main benefits if they want to acquire new knowledge and wish to publish their course. We will also learn how to choose the most suitable knowledge & learning platforms for their business.

Knowledge & learning platforms

A learning platform is a 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.



There are many benefits of such platforms 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.

The learners can also benefit from learning platforms: a learning platform provides a convenient way to access courses and training materials from anywhere in the world, anytime you want.

And if you are a small business, it is a cheap way to acquire new knowledge on almost all possible topics to be more successful.

There are many excellent examples of knowledge and learning platforms now. Among them are:

- 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
- Udemy - largest online learning platform for niche courses, almost every topic possible!
- Treehouse - web development and programming courses

... and many more!!!

How do we choose the right learning platform?

If you are eager to learn something new, you should ask yourself these questions:

- 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?

And if you are a course creator, you should consider the following:

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

Subchapter title: **Marketing automation platforms**

Short introduction to the subchapter:

In this subchapter, we will explain that marketing automation can be used if small business owners do not want to spend their valuable time doing everything by themselves manually. We will see that marketing automation can automate repetitive tasks such as email marketing, social media posting,



and even ad campaigns. Finally, we will discuss which platforms are the best for small business owners.

Marketing automation platforms

Marketing automation can be used if you do not want to spend your valuable time directly sending emails to each customer. 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. In addition, marketing automation can give you a more detailed picture of potential customer behaviour.

Small businesses can choose among (almost) free and easy-to-use marketing automation tools. Some excellent 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 solutions): HubSpot Marketing Hub, ActiveCampaign, Klaviyo, SharpSpring, Sendinblue, Omnisend...

When you start using the marketing automation platforms, you should be very careful about GDPR (General Data Protection Rules): you cannot send emails without permission from the subscribers!

The best solution is to create automation workflows that are personal and adaptable to your customers' needs. You can integrate and connect all the data from your frequently used platforms to deliver more relevant marketing. And clever use of analytics can join the collected data and reporting tools to monitor trends, track performance, and create better campaigns that reach more customers.

The collected data can also be used for remarketing and retargeting.

Subchapter title: **Communication & collaboration platforms**

Short introduction to the subchapter:

In this subchapter, we will talk about communication & collaboration platforms. A collaborative platform is a virtual workspace where resources and tools are centralized to facilitate communication and personal interaction in corporate project work.

We will discuss how the documents can be shared easily, which software is the best for online meetings and video communication, which are the best applications for team chat communication and which software can help us manage small business projects effectively.

Communication & collaboration platforms

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A collaborative platform is a virtual workspace where resources and tools are centralized to facilitate communication and personal interaction in corporate project work. They can be used for:

- Document sharing (spreadsheets, presentations, text files, etc.)
- online meetings
- exchanging information and communication about initiatives in progress (chat applications)
- work collaboration, where various project management tools can be used.

Document sharing can be done via uploading to a cloud storage and sharing. Different solutions exist. Some of them are Google Drive, Dropbox or OneDrive.

You can also send files directly to the recipients; the best possible solution for sharing your files worldwide is WeTransfer, free for files under 2 GB. It is straightforward to use and, therefore, excellent for beginners.

We also know many types of **virtual meeting software**. The most widely used are the following:

- **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 suitable for you as long as everyone has a Google Account.
- **MS TEAMS:** Microsoft Teams is a workspace for real-time collaboration and communication, meetings, and file and app sharing.

If we want to manage projects in small businesses effectively, we can use many different **project management tools**. The best and simplest tools for small businesses are:

- **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, and lists.
- **Basecamp:** a simple and remarkably effective project management platform. It also uses boards, cards, lists,...

Subchapter title: **Work automation platforms**

Short introduction to the subchapter:

Almost every task in a small business can benefit from workflow automation. Whether marketing, human resources, or finance, technology can help you work smarter, not harder. In addition, there are some excellent tools for small businesses to make the owners' work much easier; we will discuss the best and bring the most advantages to a small business.

Work automation platforms

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Almost every task in your business can benefit from workflow automation. Whether marketing, human resources, or finance, 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 grow your business without growing pains.

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. For example, after you establish the rules and logic, automated workflows can send emails, set up reminders, schedule tasks, trigger drip campaigns, and more —without anyone in your team touching a single button.

There are some excellent tools for small businesses to make your work much more manageable:

- **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 to email to find the perfect time.

Conclusion

In this chapter, we have touched on using online platforms for small businesses.

Whenever you, as a small business owner, think that your work can be better and more effective with some additional digital help, the best advice would be to search the internet and find which of the numerous solutions on the market would suit you most in each situation.

Subchapter title: **References**

Short introduction to the subchapter:

References and bibliography related to the subject of the chapter.



3.0 Detailed instructions for the trainer

Chapter 4

Step 1: Trainer must first become familiar with the chapter's introduction, aims and objectives and learning outcomes.

Step 2: Trainer must teach the PPT file related to the topic of Chapter 4.

Step 3: On slide 9, the trainer must show the relevant video (indicated below).

Step 4: On slide 15, the trainer must show the participants the overview of the platform Udemy as an example of a learning platform.

Step 5: On slide 19, the trainer can show a brief overview of the platform Mailchimp or another appropriate platform as an example of a marketing automation platform (indicated below).

Step 6: On slide 30, the trainer must provide the learners with some "food for thought": the learners should briefly think about the possibilities of implementing some of the online platforms into their day-to-day activities.

Step 7: After the completion of the chapter, the trainer must ask the learners to additionally (in the following days) reflect on which of the online platforms they should implement in their business.

Step 8: After the completion of the chapter, the trainer has to provide the learners with the reading material "Digital Platforms: What Are They and How Do They Work" (indicated below).

Resources:

PPT:

Exercises:

Readings: Hotmart. "Digital Platforms: What Are They and How Do They Work?" Hotmart, 23 Dec. 2021, <https://hotmart.com/en/blog/digital-platforms>.

Video:

[Step 3](#)

Additional materials:



[Udemy Platform](#)

[Mailchimp marketing automation](#)

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