Interreg

France (Channel Manche) England

EUROPEAN UNION

E-Channel

European Regional Development Fund

WP T2.2.2
Report on SME
On-Boarding and
Induction

Contents   **Page**

Tables   **Page**

Flowcharts   **Page**

1. Methodology

This report covers the E-Channel Project induction and on-boarding process with the participant SMEs once they were selected.

It is linked to T2.2.3 Report on E-Channel Coaching and Partnership Model. All E-Channel reports and resources are available at https://www.e-channel.org/resources/

This report also reflects on how the project partners mitigated against Covid-19 and Brexit, which had a huge impact on the E-Channel project, and specifically on the participant SMEs, including how they were inducted.

The plan was for the SME to work face to face with their Launchpad Account Manager as part of the induction and on-boarding process. This happened with SMEs who were selected early on for the project before March 2020, but due to Covid-19, innovative, new ways were found to deliver the project, for example through remote access including trialling the use of Moodle[1].

A project technical modification was made on 04.05.2020, with a realignment of some of the associated work packages so that E-Channel would still be ready to receive the participant SMEs, from both sides of the Channel, and so that outcomes and deliverables would still be met, but in different ways.

1.1 Description of the six key deliverables in T2.2.2

As part of the onboarding and induction process, the Launchpad Account Manager works with the SME to create a bespoke work plan for their e-commerce supported new market entry. As part of creating these bespoke plans, the following will be discussed and included as appropriate to each SME's situation at the time.

1	Adaptation and translation of existing SME websites and sales channel specific micro-sites for export e.g. Amazon or eBay.
2	Creation of new websites and sales channel specific micro-sites for export (e.g., Prestashop for UK SMEs and e-bay for FR SMEs).
3	To develop SME inventory data to align with selected E-Channel tools, including UK or FR market specific descriptions and pricing.
4	Translation of selected SME product descriptions, including culturally specific refinement to ensure clarity for customers. This will be undertaken by staff from both Launchpads working together.
5	To define market specific delivery and order fulfilment options for customers and logistics for SMEs.
6	To define payment and exchange rate methods / tools.

Table 1: Description of WP 2.2.2 E-Channel bid document: Deliverable T2.2.2 SME set up p25

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[1] Moodle is at https://launchpad.e-channel.org/ Moodle is a learning platform designed to provide educators, administrators and learners with a single robust, secure and integrated system to create personalised learning environments. https://moodle.org/

2. SME Selection and Evaluation Process

As part of the collaborative process between Project Partners Vertical Plus and Soledis, and to enhance SME understanding of the offer, a flowchart of the SME Onboarding and Consultation Process and Journey[2] was developed to illustrate the SME Journey, from initial interest including the selection and Evaluation Process to on-boarding and induction, and finally the Consultation.

To illustrate this process, the flowchart has been broken down into two parts;
- firstly, the process leading to SME on-boarding and induction, and
- secondly, the on-boarding and induction process.

A separate report will be available about the E-Channel Coaching and Partnership Model[3].

2.1 The Process leading to SME on-boarding and induction

Soledis and Vertical Plus selected their SMEs based on SME interest in the following areas:

- E-Commerce:
  SMEs new to e-commerce, looking to get started with online sales activity, focusing exclusively on e-commerce or as a complement to their usual business;

- New Markets:
  SMES interested in developing their e-commerce activity in a new market, either domestic or international.

- Response to Covid-19:
  SMEs needing to redirect their business activity to respond to the pandemic.

- B to B:
  SMEs looking to develop their B to C e-commerce activity towards a B to B market;

When an SME has been identified as a potential candidate for E-Channel, that SME passes through steps 1-5 of the SME Onboarding and Consultation Process and Journey.

| No	Step
1.	Initial consultation meeting with the SME by the Launchpad Account Manager.
2.	Prefill sections 1 and 2 of the Company Evaluation Form[4].
3.	Consultation with the SME by their Launchpad Account Manager.
4.	The SME application goes before an E-Channel Evaluation Panel.
5.	SME becomes a participant in E-Channel.

Table 2: Steps 1-5 of the SME Selection and Evaluation Process

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[2] This flowchart: SME Onboarding and Consultation Process and Journey, has been provided, in sections, for the purpose of this report but will be available in full at https://www.e-channel.org/resources/
[3] The E-Channel Coaching and Partnership Model report will be available at https://www.e-channel.org/resources/
[4] The Company Evaluation Form will be available at https://www.e-channel.org/resources/

This can also be illustrated in the SME Onboarding and Consultation Process and Journey: Initial Assessment flowchart below.
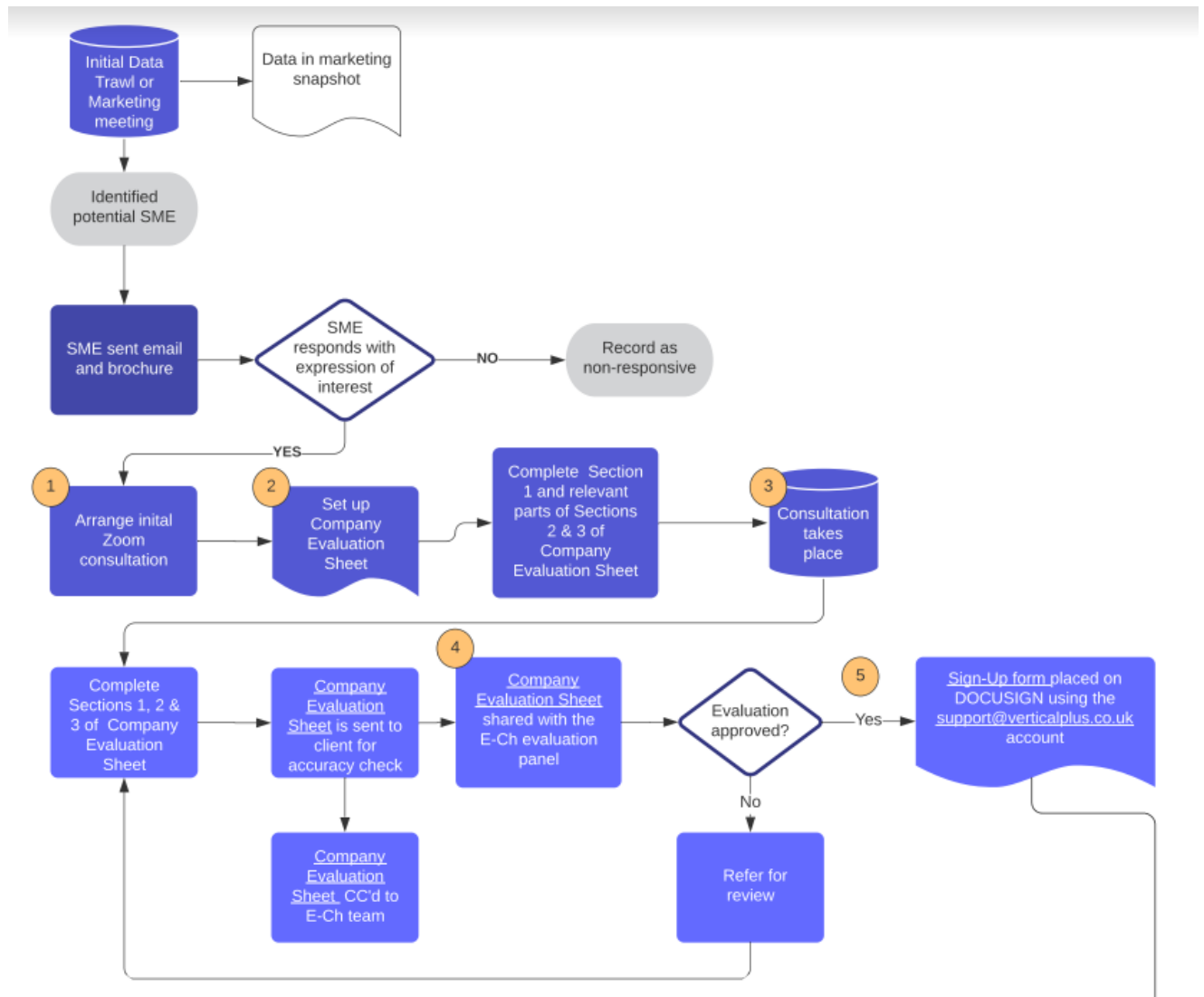
Flowchart 1: SME Onboarding and Consultation Process and Journey: Initial Assessment; Steps 1-5

2.2 The Company Evaluation Form

A key document during this process, and which is used in steps 2, 3, and 4 is the Company Evaluation Form, which was designed as part of T 2.1.1. Our thanks to the EIS Project[5] for their input at this stage. This is a data gathering document which also provides an opportunity for the SME to discuss their new market potential and aspirations with us. This document has four stages, of which three stages are covered in the process prior to SME selection prior to on-boarding and induction. (Stage Four will be discussed in 3.3. of this report).

Stage 1: General Background information 1
This includes checks that the SME qualifies for the E-Channel Project, for example by being in the blue France Channel England (FCE) Zone.

Stage 2: Business Situation
This meeting is conducted face to face or via video conference and is the opportunity for the Launchpad Account Manager to explain more about the project and gather further information from the company on the softer aspects of the project participation.

Stage 3: Sign up
The SME is emailed a letter confirming their suitability to take part in the E-Channel project and is asked to complete the declaration stating they are an SME, that they wish to take part, and that they will work with E-Channel over the designated 4-month intensive consultancy time frame.

3. The on-boarding and induction process

Once the SME Company Evaluation Sheet has been reviewed and accepted by the review panel, the SME is ready for on-boarding and induction. The SME passes through steps 6-14 of the SME Onboarding and Consultation Process and Journey, as illustrated in the flowchart below. These 9 steps in this process are highlighted below and the key tools and documents are discussed in greater detail.

| No	Step
6.	Sign up complete including de Minimis[6]
7.	The SME completes the E-Channel Data Source Questionnaire[7].
8.	Section 4 of the Company Evaluation Form is completed.
9.	Launchpad Account Manager completes the initial assessment.
10.	SME Receives a copy of the initial assessment.
11.	Launchpad Account Manager holds a review meeting with the SME.
12.	The Launchpad Account Manager and the SME agree on a New Market Entry Plan[8] around inventory, marketing, profit and growth.
13.	The SME signs up to Moodle, where they undertake a personalised course around the agreed plan with specific objectives, set in agreement with the Launchpad Account Manager.
14.	The Launchpad Account Manager connects the agreed SME inventory and data to the DMCP[9].

Table 3: Steps 6-14 of the Induction and Onboarding Process

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[6] Further information about de Minimis / State Aid regulations is available at https://www.channelmanche.com/assets/Guidance-Note-11-v11.pdf and also Commission Regulation (EU) No. 1407/2013
[7] The Data Source Questionnaire will be available as a pdf at https://www.e-channel.org/resources/
[8] An example of a New Market Entry Plan will be available at https://www.e-channel.org/resources/ and this questionnaire will be discussed further in future reports.
[9] The Data Management Control Platform, or DMCP, is a data and support model for organising inventory, identifying opportunities and measuring success in online marketplaces. More information about the DMCP can be found at https://www.e-channel.org/resources/ and https://dmcp.e-channel.org/
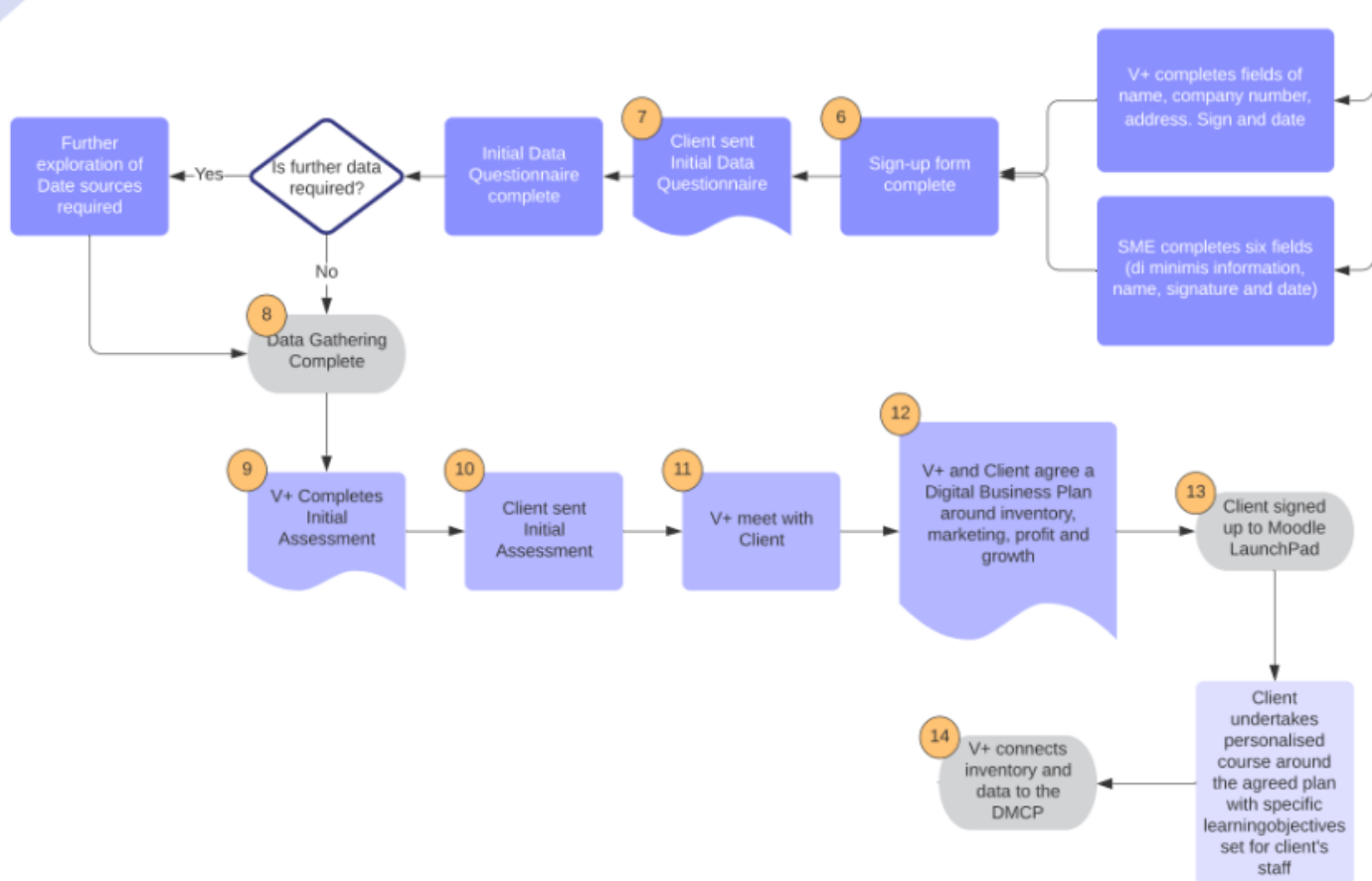
Flowchart 2: SME Onboarding and Consultation Process and Journey: on-boarding and induction. Steps 6-14

3.1 De Minimis

As part of the Company Evaluation Form (Section 2.6), it is important to ascertain whether the SME has already taken part in government funded projects as there are limits to the amount of state aid that any one organisation can receive within any three-year period.

As an EU funded project, E-Channel is required to provide each participant SME with a statement of the estimated value of the State Aid received (in euros). This will be in the form of a de Minimis declaration, towards the end of the project.

3.2 Data Source Questionnaire

A key document during this stage of the process, and covered in steps 7 to 8, is the Data Sources Questionnaire for E-Channel.

The E-Channel Project helps SMEs to understand their own data. This purpose of the Data Sources Questionnaire is to collect some basic information from the SME about their data sources. This part of the project has two purposes.

- The first part enables E-Channel to be aware of what data the SME has access to so the launchpad account manager can perform an initial analysis of the SME's online performance.

- The second part acts as a checklist or review of all the data sources the SME has, so that the Launchpad Account manager can make sure the SME is making the most of them. This will help the SME to monitor and plan their online business growth.

3.3 SME Data and the DMCP

The DMCP was conceived to support SMEs via their Launchpad including face to face mentoring. As a result of Covis-19, restrictions on travel and requirements for social distancing meant that access to the DMCP had to be done remotely. Accessing and evaluating the SME data was the crux of the SME on-boarding and induction process.

A set of 4 DMCP Tools Guides[10] were created:

1. Inventory Management
2. Market Assessment
3. Business Planning
4. Business Growth

The use and outcomes from the DMCP will be discussed in the next report.

3.4 Moodle access to the DMCP

The Covid-19 pandemic events from Spring 2020, began at a time when the audit and preparation process had already started, with the process of SME identification and long listing well underway; this had a huge impact on this stage of the E-Channel project. Innovative, new ways were explored to deliver the project to the participant SMEs, for example through remote access including the use of Moodle.

E-Channel planned to move SMEs to remote access training and additional support via Moodle, a learning platform designed to provide educators, administrators and learners with a single robust, secure and integrated system to create personalised learning environments. As a training tool, to support SMEs, it was envisaged that Moodle would be an important part of the induction process as well as through the course of the project. However, as the on-boarding started, the effectiveness of the dynamic SME Onboarding and Consultation Process meant that, ultimately, the SMEs fed back that they did not need Moodle or had found the DCM tools and Launchpad Account Manager feedback sufficient.

4. SME on-boarding and induction - Summary

The primary focus of the SME on-boarding and induction was collecting data, in order for E-Channel to evaluate and prepare for the consultancy work with the participant SME. It was imperative for Vertical Plus and Soledis to understand how the SME worked; their aims and ambitions, their process and the technology they were using as well as their sales data and how they were using it. The Data Source Questionnaire was a crucial part of this process. However, this proved to be a longer and more complicated process for both Vertical Plus and Soledis due to multiple factors:

- Due to the pandemic, the Launch Pad Account Managers were not able to meet face to face with the participant SMEs. Both SMEs and Launchpad Account Managers fed back that this had a negative impact on building relationships and communications.

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[10] The set of 4 DMCP Tools Guides will be available at https://www.e-channel.org/resources/

- In some cases, the participant SME had very little experience of e-commerce, or of using their e-commerce data effectively. On some occasions, this was not an easy conversation for the Launchpad Account Managers to have with the SME, particularly when they had to do it remotely. Some SMEs were more open and honest about their need for support. To mitigate this, the Launchpad Account Managers booked virtual meetings with future participant SMEs to go through the data questionnaire together, and stopped doing it remotely via emails. In this way, they could get the information they needed, which was cost effective, while also more supportive for the SME.

- Business size and capacity had been flagged as a potential risk by Vertical Plus and Soledis before the pandemic, and had been addressed in Section 2.8.3 of the Initial Company Evaluation Form. However, as some SMEs had no choice but to put staff on furlough there were issues around SME capacity and staffing and whether they would be able to take part in E-Channel. However, from the first lockdown in March 2020, in both France and the UK, and the pandemic uncertainty throughout 2020, of those SMEs who signed up, all of them completed on-boarding and induction process.

- It became clear from an early stage, that some SMEs had limited knowledge of their sales and marketing systems as well as their data. In a number of cases, a third-party company was managing a lot of this and in some cases, this was actually hindering the success of these SMEs businesses online.

- Another recurring issue was to do with Search Engine Optimisation (SEO[11]). This was a grey area in terms of who is responsible for SEO optimisation. The on-boarding showed that a number of the SMEs lacked advertising expertise, knowledge and confidence with this work. For those SMEs who were using website hosting solution companies, these hosting companies did not necessarily see this as their responsibility, or it was not part of their service package.

- There was inconsistency around how much the participant SMEs understood their data. Many of the SMEs did not actively interact with or integrate their data with other company systems to better understand their online business. This identified a significant development need for some SMEs.

- With regard to Google Analytics, a significant number of participant SMEs had not set up their analytics with e-commerce tracking enabled, so they had unwittingly been missing out on vital conversion data. This needed to be rectified by their launchpad account manager first, in order for E-Channel to be able to advise them as part of their new market evaluation. However, this prolonged the process as at least a month-worth of data was needed for the purposes of an evaluation to begin.

- Stock management was another recurring issue which impacted on data. Even established businesses, with e-commerce experience faced challenges involving stock management and how their online store can share / integrate with their bricks and mortar-based stock management systems.

- A significant number of SMEs fed back that, with so much choice when starting their e-commerce journey, they had found it difficult to choose which platform or platforms were right for them. The participant SMEs were using a range of different e-commerce systems including Shopify, WooCommerce, Prestashop, Oxatis, Opencart, Magento and others. Each of these platforms has their advantages and disadvantages in terms of usability, speed/performance, costs, SEO and ease of integration with other systems. Integrating these different systems with the DMCP has proven to be one of the most time consuming and complicated challenges for the project on both sides of the Channel.

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[11] Search engine optimization is the process of improving the quality and quantity of website traffic to a website or a web page from search engines. SEO targets unpaid traffic rather than direct traffic or paid traffic.

However, the most important and powerful outcome from the SME on-boarding and induction process has been that, by the SMEs engaging with the project and with E-Channel raising these issues as part of the on-boarding and induction process, these SMEs are now ready for the next stage of the consultancy; working with E-Channel to find ways to plan accordingly for the future and refocus their efforts where required, to help develop their systems and processes to increase the success of their e-commerce ambitions. This will be addressed in the next report, which is about the E-Channel Coaching and Partnership Model. This report picks up from where the initial data has been collected and evaluated, and from which, a New Market Entry Plan is generated.