SMARTER
SMEs
Strategic Mindsets and Redesigned
Technological Environments Regenerate

TUTORING AND TRAINING KIT

Work Tools:

Checklist for the Tutor

and

Entrepreneur Feedback Form

CHECKLIST FOR THE TUTOR

What this checklist is and how to use it

This checklist is a practical support tool for tutors involved in the SMARTER SMEs project. It helps to track and guide each step of the support process as the entrepreneur develops their SME's digital transformation strategy.

The checklist is structured into five key phases, each with clear objectives and specific actions to be completed. It is designed to:

- Ensure consistency and quality across the tutoring activities
- Facilitate progress tracking throughout the process
- Provide tutors with a clear and operational guide at all stages

It can be used:

- As an active working tool, to be checked off as tasks are completed
- As a basis for reporting and team coordination
- As a self-assessment aid for tutors to reflect on their effectiveness

Tutors may customize some entries to fit national or sector-specific needs. Technical support is available in case of difficulties with the digital tools.

CHECKLIST

Before starting with the checklist, it is necessary to read the operational manual of the tutoring path in order to be familiar with the structure and content of the *Tutoring & Training Kit*. *You must* have access to the project's online platform and digital tools (e.g., Digital Advisor) and you must understand how to use the Digital Advisor. Additionally, you should be familiar with the Tube Story component as the first motivational step. It is highly recommended to complete the MOOC before tutoring the SMEs/Entrepreneurs.

Phase1– Awareness Raising

The main goal is to activate the process and build trust

- ☐ I have expanded the Strategy and chosen the communication channels and dissemination
- ☐ I have organized a workshop or dissemination activities (optional)
- ☐ I have introduced the *enabling technologies fact sheets*
- ☐ I have implemented the Tube Story to promote awareness of the importance of digital transformation

Phase 2 – Needs Analysis

The main goal is to understand the company's starting point

- ☐ I guided the entrepreneur in completing the *Digital Advisor* and received the Self-Assessment *report*
- ☐ We reviewed and discussed the self-assessment results together
- ☐ I supported the entrepreneur in identifying strengths and weaknesses

Phase 3 –Defining Strategy

The goal is to co-create a digital transformation strategy

- ☐ We reviewed relevant sectoral digital strategy cases, including twin transition examples
- ☐ I presented the *financial opportunities fact sheet* available for SMEs
- ☐ We noted the most relevant technologies and opportunities for the company
- ☐ I have developed the first draft for the Digital Transformation Strategy using the prompt for AI
- ☐ I have adapted the strategy of interacting with the AI to the requirements of the entrepreneur
- ☐ I verified that the draft strategy includes at least:
  - Vision and Strategy Objective
  - Digital Maturity Assessment
  - Strategy Levers
  - Operational Action Plan
- ☐ I have sent the strategy by email
- ☐ A priority has been selected for the pilot testing

Phase 4 – Implementation

- ☐ I assisted in defining a simple plan with:
  - Actions
  - Timeline
  - Responsible persons
  - Resources (internal/external)
- ☐ I have contacted a technological supplier for the implementation phase
- ☐ I provided the *practical implementation guidelines* for SMEs included in the operational manual

Phase 5 – Closure and follow-up

The goal is to conclude the tutoring process clearly and constructively

- ☐ We outlined concrete next steps for the following 3–6 months to establish a continuous improvement of the **Digital Transformation Strategy**
- ☐ I collected feedback from the entrepreneur about the usefulness of the process
- ☐ I officially closed the process with a brief summary document (if applicable)

Tools and resources to use during the process

During the tutoring process, tools and resources created in the SMARTER SMEs project will be used:

- Digital Advisor and Digital Advisor report
- Enabling technologies fact sheets
- Sectoral strategies fact sheets
- Financial opportunities fact sheets
- Strategy draft template
- Practical implementation guidelines
- Operational manual
- Entrepreneur feedback form

Notes for tutors

Here is some useful information for tutors:

- This checklist can also be used for *self-assessment* of tutoring effectiveness.
- Tutors may *customize some sections* based on national or sector-specific context.
- In case of technical difficulties with tools (e.g., Digital Advisor), a helpdesk is available at GAIA or Roscioli Development.
- A follow-up contact with the entrepreneur is recommended 3 months after completion.



ENTREPRENEUR FEEDBACK FORM

Introduction:

Thank you for participating in the tutoring process. Your feedback will help us improve the quality and impact of the service offered to entrepreneurs and SMEs like you. Please answer honestly based on your experience.

1. How clear was the structure of the tutoring process?
    a. Unclear
    b. Somewhat clear
    c. Very clear
2. To what extent did the sessions help you reflect on your business challenges?
    a. Not at all
    b. Somewhat
    c. A lot
3. How relevant was the content discussed to your business needs?
    a. Not relevant
    b. Moderately relevant
    c. Highly relevant
4. How useful were the tools or methods used during the tutoring process?
    a. Not useful
    b. Somewhat useful
    c. Very useful
5. How satisfied are you with the follow-up and continuity of the tutoring sessions?
    a. Not satisfied
    b. Somewhat satisfied
    c. Very satisfied
6. How well did the tutoring process adapt to your business context?
    a. Poorly
    b. Adequately
    c. Very well
7. To what extent has tutoring supported your decision-making process?
    a. Not at all
    b. To some extent
    c. Significantly
8. Would you recommend this tutoring service to another entrepreneur?
    a. No
    b. Maybe
    c. Yes
9. What part of the tutoring process was most valuable to you, and why?

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10. What suggestions do you have to improve the tutoring service?

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BY NC SA

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