

'Building Small Business Resilience' Digital Marketing Training Program

Stage 2: Program Development

This is the second report from our research project: 'Building Small Business Resilience' (BSBR) Digital Marketing Training Program. It summarizes the development of the Alpha Training Prototype, the first iteration of the training program. The Alpha Training Prototype is designed to be a 12-week training program to bridge digital marketing skill gaps for underrepresented small business owners, and support them to pivot and grow their businesses online.

This Alpha Training Prototype will be tested with the first cohort of training participants in Stage 3 of the research project.

Background

As the COVID-19 pandemic plunged the global economy into the worst recession since World War II ^[1], under-represented businesses were amongst the hardest hit due to their existing financial fragility and poor economic health ^[2]. As businesses have been forced to pivot online, owners have been faced the need to quickly upskill their digital marketing capabilities. The BSBR Digital Marketing Training Prototype will be specifically designed to address vital skill gaps and build resilience amongst underrepresented small business owners to prepare them to face any future economic shock or disruption.

Objectives

The project aims to:

- Increase equitable, diverse and inclusive participation in small business sectors
- Develop optimal training courses and tools to bridge digital marketing skill gaps for small business owners
- Develop and enhance other training programs in adult education, experiential learning, and digital marketing as we learn from the research data

Expected Outcomes

For the short-term outcome at the end of the training program, participants are expected to be able to develop and execute a digital marketing campaign plan applicable to their own businesses and customer base; identify elements of successes and failures; and make necessary changes to optimize the results.

For the long-term outcomes, participants are expected to successfully apply their knowledge and skills gained from the BSBR program, pivot their businesses online and increase their revenues and resilience against any future economic disruption. More successful underrepresented owners will experience more equitable, diverse and inclusive participation in small business sectors.

The training prototype is expected to be developed into programs offered by Sheridan College. Learning gained from the project will be applied to the development of other digital marketing programs in the Pilon School of Business, Faculty of Continuing and Professional Studies and EDGE Entrepreneur Hub at Sheridan College.

Research Process

There are 5 stages of research:

Stage 1: Program Design

Stage 2: Program Development

Stage 3: Alpha Testing

Stage 4: Beta Testing

Stage 5: Program Evaluation

This report covers Stage 2: Program Development.

Stage 2: Program Development

The goal of the second stage of the research, Program Development, aims to design and develop a 12-week training program specifically for underrepresented small business owners to help them pivot and grow their businesses online.

We used the findings from the first stage which included online surveys, online discussion boards, and focus group discussions to understand our participants and their needs to develop a customised training program that is relevant and responsive to their businesses.

1. Who are the participants?



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Participant Persona

Zara

- Zara is a 43-year-old woman, Canadian born with a Malaysian heritage. She speaks English as a first language
- She has a Bachelor's Degree in Commerce and a high level of computer literacy
- Zara has been running her business in Hamilton, Ontario for 3 years. Her business, Hamilton Stitches, sells hand embroidery kits and supplies as well as offers embroidery classes. Her current customers are mostly in Hamilton.
- During the COVID-19 pandemic, her business experienced negative growth with a 58% reduction in sales revenue as her brick-and-mortar shop was closed during the lockdown. Zara started an e-commerce store about a year ago and would like to expand it to reach customers nationally.
- Zara is still new to digital marketing. Her website was created three years ago but it is more like an online brochure and consists of 3-4 webpages. She started using Facebook two years ago, posting about new classes and new product arrivals about twice a month whenever she could find the time.
- Most of her customers come from word of mouth and passerby. She does not engage in any offline or online advertising.

After 3 years of operation with proven revenue generation, Hamilton Stitches has survived the concept stage and demonstrated that it is a viable business entity. Zara has successfully built a customer base using her brick-and-mortar store presence and traditional word of mouth recommendations. Her customer base is confined within her local community.

The pandemic forced Zara to adopt e-commerce very quickly without having the necessary skills and resources to navigate and capitalize the online market. As a solo entrepreneur, she wears many hats with endless to-do lists, and always runs behind schedule. Zara always searches for new ideas. She improvises and makes up her plans as she goes. She tries out different ideas but is never quite sure which one works. As a result, her online marketing attempts are sporadic and uncoordinated. She would like help planning a cohesive, long-term strategy as well as executing day-to-day tactics with a strong ROI to justify her marketing efforts.

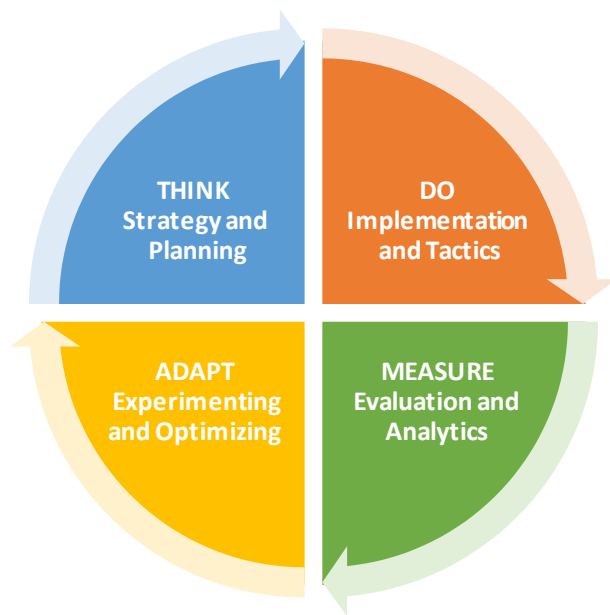
2. What to include in the training

To determine the content of the training program, we use the backward design approach^[3], which is a goal-based framework for curriculum development.

2.1 Identify learning outcomes

The first step in the backward design process is to determine the desired goals or learning outcomes, which are the knowledge and skills learners should have acquired when they finish the program.

Our short-term goal at the end of the training program is for Zara to develop (THINK) and execute (DO) a digital marketing campaign plan that is applicable to her own businesses and customer bases; identify elements of success and failures (MEASURE); and make necessary changes (ADAPT) to optimize results. Our long-term goal is for Zara to successfully apply the knowledge and skills to increase her revenues and become resilient against any future economic disruptions.



Big Idea: DIY Continuous Improvement Process

The big idea is for Zara to become self-reliant in digital marketing by teaching her DIY (do-it-yourself) skills so she can continue to plan and execute digital marketing activities, and improve the results by herself.

Once she masters these skills, she can keep experimenting and adapting her marketing efforts to grow her business. Ultimately, her adaptability will protect her business against any future disruption.

We break down the goal into 4 learning outcomes (LO) following the sequence of a marketing process:

LO#1 - THINK: Strategy and Planning
Develop marketing strategy and create a cohesive plan

LO#2 - DO: Implementation and Tactics
Execute the plan using suitable digital tactics

LO#3 - MEASURE: Evaluation and Analytics
Assess the performance using data

LO#4 - ADAPT: Experimenting and Optimizing
Learn from past results to keep improving

We chose to adopt a marketing campaign as the learning conduit as it covers critical marketing concepts and offers an opportunity to practice the whole marketing process within a short timeframe.

Training paths, topics and elements

From the research findings, participants' feedback was tagged and grouped into learning paths, topics, and elements, then aligned with learning outcomes.

Learning priority

Learning priority determines how important each element is to the learning outcomes and how extensive it should be covered. It can be categorised into 3 levels:

- Good to know (G): learners should be introduced and familiarized with these concepts.
- Important to know (I): learners should understand these concepts.
- Critical to know (C): learners should understand and be able to apply these concepts. They are essential to successful learning outcome.

Learning Outcome (LO)	Learning paths and topics	Learning elements	Learning Priority
Strategy and Planning LO#1: Develop a digital marketing campaign plan	Overall planning (16% of the comments)	Understand business strategy	G
		Understand marketing strategy	I
		Understand business plan	G
		Understand marketing plan	I
		Create marketing campaign plan	C
		Develop marketing campaign strategy	C
	Environmental scan	Understand external environment	I
		Conduct competitive analysis	C
	Target market, target audience and persona (11% of the comments)	Understand market segmentation	I
		Identify target markets	I
		Choose the right target audience for each campaign	C
		Research and empathize with the persona	C
	Unique selling proposition (USP) and value proposition (10% of the comments)	Develop USP/value proposition for each target audience	C
		Understand content marketing	C
		Generate content ideas	C
		Create pillar and micro content	C
		Understand cluster content	I
	Sales funnel, customer journey, customer relationship management (12% of the comments)	Generate online leads: lead generation	C
		Convert word of mouth to online recruitment	C
		Build online relationship: lead nurturing	C
		Convert leads to purchases: customer conversion	C
		Develop long-term relationship: customer loyalty	I

	Goals, objectives and KPIs	Understand business goals	C	
		Create marketing objectives	C	
		Specify Key performance indicators (KPIs)	C	
		Understand Return on investment (ROI)	I	
		Align objectives and KPIs for planning and evaluation	C	
Implementation and Tactics LO#2: Execute digital marketing tactics	<ul style="list-style-type: none"> • SEO • E-Commerce • Online Advertising • Email Marketing • CRM (24% of the comments)	Search Engine Optimization (SEO) <ul style="list-style-type: none"> • Create a campaign landing webpage • Optimize webpages Software demonstration <ul style="list-style-type: none"> • WordPress + Yoast • SEMrush or other analytics software 	C	
		E-commerce: <ul style="list-style-type: none"> • Optimize product description Software demonstration <ul style="list-style-type: none"> • Amazon • WooCommerce 	C	
		Online Advertising <ul style="list-style-type: none"> • Create online ads • Testing, measure and evaluate performance • Allocation for ad spend Software demonstration <ul style="list-style-type: none"> • Facebook/Instagram • Google 	C	
		Email Marketing <ul style="list-style-type: none"> • Understand list segmentation • Use A/B Testing Software demonstration <ul style="list-style-type: none"> • HubSpot 	C	
		Customer Relationship Management (CRM) <ul style="list-style-type: none"> • HubSpot 	I	
		Earned media <ul style="list-style-type: none"> • Public and media relations • Link building • Influencer marketing • Google My Business 	G	
		Best practices, ideas, tips, and tricks	Choose the right channels for the target audience	C
			Develop the right content for the target audience	C
Link strategy to tactics	C			

	Time management	Create a campaign calendar	C
		Create a yearly marketing calendar	I
		Link time management to KPIs and ROI	I
	Budget management	Set up and manage marketing budget	I
		Link budget to KPIs and ROI	I
	Outsourcing	Hire staff, freelancers, agencies	G
		Project briefing / delegate tasks	G
		Performance monitoring and evaluation: KPI and ROI	G
Evaluation and Analytics	Technical how-to	Collect data from digital channels	C
LO#3:	• Data Collection	Analyze and interpret the results	C
Evaluate the campaign results	• Data Analysis	Link results to KPIs and ROI	I
Experimenting and Optimizing	Adapting and continuous improvement	Develop an action plan from the results	C
LO#4:			
Learn and adapt the plan, strategy or tactics			

2.2 Determine evidence of learning

We plan to evaluate if Zara has achieved the Big Idea's learning outcomes by asking her to perform tasks, analyze the results and make recommendations for improvement. She then will be asked to adjust her work, and analyze the results again. This learning experience will guide her through the full cycle of the DIY Continuous Improvement Process.

Learning Outcomes	Performance Tasks and Evidence of Learning
LO#1 - THINK: Strategy and Planning Develop marketing strategy and create a cohesive plan	<ul style="list-style-type: none"> • Create a 4-week digital marketing campaign plan for her business
LO#2 - DO: Implementation and Tactics Execute the plan using suitable digital tactics	<p>To promote her campaign, Zara will:</p> <ul style="list-style-type: none"> • Create a campaign landing webpage on her website <p>To drive traffic to her webpage, Zara will:</p> <ul style="list-style-type: none"> • Create social media posts • Create email blast • Create online advertisements • Identify influencers, media and public relations, and link building opportunities
LO#3 - MESAURE: Evaluation and Analytics Assess the performance using data	<ul style="list-style-type: none"> • Compile a data analytics report on the performance of her campaign webpage, website, social media, and online advertisements
LO#4 – ADAPT: Experimenting and Optimizing Learn from past results to keep improving	<p>After 2 weeks of campaign launch, Zara will</p> <ul style="list-style-type: none"> • Analyze the data • Adjust her tactics: social media posts, email blast and online advertisements • Compile a follow-up weekly data analytics report on the performance

The evaluation will be done by instructors and participants (peer-reviewed).

2.3 Plan learning experience

	Learning Outcomes	Key Learning Events and Activities
Week 0		<p>Pre-training Activities Zara will be provided with an audit report on her digital performance. This will form part of her SWOT analysis, and subsequently campaign strategy and plan.</p> <p>The Program Workbook will also be available prior to the program start. Zara will be encouraged to start working on the Workbook and answer as many questions as she can.</p>
Week 1-4	LO#1 - THINK: Strategy and Planning Develop marketing strategy and create a cohesive plan	<p>Instructor-led Lectures and Workshops Lectures includes explanation of underpinning theoretical concepts and samples, and using participants' businesses as case studies.</p> <p>Zara will be guided through a series of questions and activities on the Workbook, which will help her formulate her campaign plan.</p>
Week 5-9	LO#2 - DO: Implementation and Tactics Execute the plan using suitable digital tactics	<p>Participant-led Lectures and Workshops Zara and other participants are invited to share technical how-to tips with the class.</p>

		<p>Show and Tell Zara and other participants are encouraged to give each other feedback on their tactics: webpage, social posts, e-commerce, online ads, influencers, inbound links and email.</p>
Week 10	<p>LO#3 - MEASURE: Evaluation and Analytics Assess the performance using data</p>	<p>Instructor-led Workshops Zara will use the Workbook to record her results and answers questions, which are designed to help her reflect on her campaign results.</p>
Week 11-12	<p>LO#4 – ADAPT: Experimenting and Optimizing Learn from past results to keep improving</p>	<p>Show and Tell Zara and other participants share their lessons learned and ideas to better their results.</p>

3. How to offer the training

The BSBR training program is designed following the Universal Design for Learning (UDL) Guidelines, underpinned by the adult learning principles and the experiential learning approach.

The Universal Design for Learning (UDL) Guidelines ^[4] ^[5] is a framework to optimize learning experience for all learners by identifying design elements that provide the greatest access for the range of learners in any setting. Its premise is that when we design for particular accessibility needs, all learners benefit. The UDL Guidelines advocate that learners should be provided with multiple means of engagement (the why of learning), multiple means of representation (the what of learning), and multiple means of action and expression (the how of learning).

Adult learning principles ^[6] recommend that adult learners who are self-directed, should be encouraged to take charge of the content and process of their learning. Their prior knowledge and life experience should be capitalized and built upon with the learning of new concepts. Adult learners are intrinsically motivated by practical, problem-solving content that is directly relevant and applicable to their work or life. They are also result-oriented, so they tend to move quickly from theory to application.

According to Kolb's Experiential Learning Model (ELM) ^[7], to develop new knowledge and skills, learners must learn by immersing themselves in an active, hands-on experience; reflecting on that experience; concluding and conceptualizing the experience; and then engaging in experimentation by trying out the newly gained knowledge and skills.

The BSBR Digital Training Program will be delivered online over 12 weeks. The online mode is chosen not only to comply with the COVID-19 health regulations, but also to accommodate participants' busy schedules. The main advantages of online learning are flexibility and convenience. Participants can join the class in the convenience of their own space with no travel time. However, it is harder to focus and engage with instructors and other learners virtually, which could leave learners to feel isolated and unmotivated. Therefore, the program is designed with frequent touchpoints, offering multiple contact opportunities and channels for participants to engage with instructors, support staff and each other.

Each week, there will be two lecture sessions and one workshop session with ongoing support throughout the program period.

3.1 Lectures

There will be two lecture sessions per week. Some of the sessions will be elective, allowing participants to choose the sessions that are relevant to their businesses. The mandatory sessions provide crucial learning components, which will be scaffolded to create a learning path to achieve the desired learning outcomes.

Each session could consist of 1.5 hours, which could be divided to:

- **Introduction** (5-10 minutes)
This section is allocated to greetings and introducing the class agenda as well as recapping and answering questions on the last class's topic.
- **Lecture** (40-50 minutes)
The lecture section could be instructor-led, participant-led or a combination of both. This section will be recorded to provide an asynchronous learning mode for participants to learn on their own time.

An instructor-led lecture aims to provide participants with theoretical and conceptual foundations on a digital marketing topic with real life samples to illustrate the concepts.

For a participant-led lecture, participants will be invited to share their knowledge and skills with the class. We acknowledge that many participants have years of experience in particular areas of digital marketing. Sharing the knowledge with the class will not only benefits others, but also themselves, since one of the best ways to reinforce learning is to teach.

- **Case study or show and tell** (20-30 minutes)

This case study section is designed to be an open discussion on the topic using one of the participants' businesses as a case study. The discussion will guide participants to apply the learned concepts by analyzing problems, brainstorming ideas, anticipating potential issues or difficulties, and working out solutions. Case studies will be on the voluntary basis only. If there are no suitable volunteers, external case studies will be used. The case study section will not be recorded to allow for an open and candid discussion.

In the show and tell section, participants are encouraged to share their assignments, including campaign plans, executions and results with their groups and the class. Peer reviews will be adopted so participants can seek feedback and ideas to improve their outcomes and learning.

- **Question time** (5-10 minutes)

This section is to wrap up and answer questions about the class's topic.

- **Homework** (1-2 hours)

Participants will be provided with a Program Workbook, which consists of an assignment for each topic. Generally, the assignment will ask participants to apply the acquired concepts to their own business.

Experimentation is strongly encouraged. Rather than using their own digital platforms which have real customers and audience, participants can use Program's digital channels to experiment and test their ideas. Mistakes and mishaps are considered crucial learning activities.

BSBR Program's digital channels are a dedicated learning platform where participants can practise their digital marketing activities. These channels include:

- Website: <https://nine.psbdigital.ca/>
- Facebook: <https://www.facebook.com/PSB9Digital/>
- Instagram: <https://www.instagram.com/psb9digital/>
- Twitter: <https://twitter.com/PSB9Digital>
- LinkedIn: <https://www.linkedin.com/showcase/79696003/>
- YouTube: <https://www.youtube.com/channel/UCI6r71ARybNVCWj5uw9jKfQ>
- Google Ads: These will be undertaken on the participant's channel with practice in HubSpot
- Facebook Ads: These will be undertaken on the participant's channel with practice in HubSpot
- HubSpot email: <https://app.hubspot.com/email/6800850/manage/state/all>

3.2 Workshops

There will be one Instructor-led workshop per week. This optional session is designed to assist participant with their assignments. Participants can choose to attend to ask questions and assistance on how to apply digital marketing concepts to their businesses. The workshop session will be group-based so participants can learn from one another. Participants can share their problems with the group and instructors will guide the discussion for possible solutions. The workshop sessions will not be recorded.

3.3 Support

- **Technical Support**

Support is available to assist participants with technical issues, mainly software setup, how-to and trouble shooting. The stated and communicated intention will be to answer all enquiries within 48 hours.

- **Group Support**

Participants will be organized into groups at the beginning of the Program. The goal is to mix participants from different industries with various digital experience and skill levels so participants can share, provide constructive feedback, and learn from one another. The Program is expected to put pressure on small business owners who already have competing demands on their time. The group role is to help their group members complete the assignments as well as motivate and encourage one another to stay the course and complete the program.

- **Class Support**

There will be an online social group set up for each program cohort to build a community of learning. The social channel will be a safe and open space for collaborating, commenting and sharing their knowledge; providing emotional support and connection as well as networking.

3. Next Step

The second stage of the research project, Program Development, is complete. We are ready to progress to the next stage, Alpha Testing, which is the launch of the first training prototype in September 2021.

Proposed weekly outline

Week	Class	Mode	Content	Assignment
Strategy and Planning				
Week 0		Mandatory		<ul style="list-style-type: none"> • Training Benchmarks and Results • Digital Audit Spreadsheet • Workbook Part 1: Campaign Planning and Strategy
Week 1 Sep 27	Lecture 1 and 2	Mandatory	<ul style="list-style-type: none"> • Digital audit spreadsheet • Competitive analysis • Overall planning • Environmental scan 	<ul style="list-style-type: none"> • Workbook Part 1: Campaign Planning and Strategy
	Workshop	Optional		
Week 2 Oct 4	Lecture 1 and 2	Mandatory	<ul style="list-style-type: none"> • Target market, target audience and persona 	<ul style="list-style-type: none"> • Workbook Part 1: Campaign Planning and Strategy
	Workshop	Optional		
Week 3 Oct 11	Lecture 1 and 2	Mandatory	<ul style="list-style-type: none"> • Marketing Mix • Unique selling proposition (USP) and value proposition • Goals, objectives and KPIs 	<ul style="list-style-type: none"> • Workbook Part 1: Campaign Planning and Strategy
	Workshop	Optional		
Week 4 Oct 18	Lecture 1 and 2	Mandatory	<ul style="list-style-type: none"> • Sales funnel, customer journey, customer relationship management • CRM software 	<ul style="list-style-type: none"> • Workbook Part 1: Campaign Planning and Strategy
	Workshop	Optional		
Implementation and Tactics				
Week 5 Oct 25	Lecture 1 and 2	Mandatory	Owned media <ul style="list-style-type: none"> • Content marketing • Website and campaign landing webpage • SEO 	<ul style="list-style-type: none"> • Workbook Part 2: Campaign Execution: Landing Webpage
	Workshop	Optional		
Week 6 Nov 1	Lecture 1 and 2	Elective	Owned media <ul style="list-style-type: none"> • Social media marketing • Email marketing 	<ul style="list-style-type: none"> • Workbook Part 3: Campaign Execution: Social Posts • Workbook Part 4: Campaign Execution: Email Blast
	Workshop	Optional		
Week 7 Nov 8	Lecture 1 and 2	Elective	Owned media <ul style="list-style-type: none"> • E-commerce Paid media <ul style="list-style-type: none"> • Google advertising 	<ul style="list-style-type: none"> • Workbook Part 5: Campaign Execution: Google Ads
	Workshop	Optional		•
Week 8 Nov 15	Lecture 1 and 2	Elective	Paid media <ul style="list-style-type: none"> • Google advertising • Social media advertising 	<ul style="list-style-type: none"> • Workbook Part 6: Campaign Execution: Social Ads
	Workshop	Optional		
Week 9 Nov 22	Lecture 1 and 2	Elective	Earned media <ul style="list-style-type: none"> • Public and media relations • Link building • Influencer marketing • Google My Business 	

	Workshop	Optional		
Evaluation and Analytics				
Week 10 Nov 29	Lecture 1 and 2	Mandatory	<ul style="list-style-type: none"> • Data collection • Data analysis 	<ul style="list-style-type: none"> • Workbook Part 7: Campaign Evaluation
	Workshop	Optional		
Experimenting and Optimizing				
Week 11 Dec 6	Lecture 1 and 2	Mandatory	<ul style="list-style-type: none"> • Campaign analysis and reflection • Action plan and re-implementation 	<ul style="list-style-type: none"> • Workbook Part 8: Campaign Iteration
	Workshop	Optional		
Week 12 Dec 13	Lecture 1 and 2	Elective	<ul style="list-style-type: none"> • Re-evaluation • Time and budget management • Outsourcing 	<ul style="list-style-type: none"> • Workbook Part 8: Campaign Monitoring
	Workshop	Optional		

Reference

- [1] The World Bank (June, 2020). *COVID-19 to Plunge Global Economy into Worst Recession since World War II*. Retrieved from <https://www.worldbank.org/en/news/press-release/2020/06/08/covid-19-to-plunge-global-economy-into-worst-recession-since-world-war-ii>
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