

Strategic Plan for Institutionalization



3WAYS

TO INSTITUTIONALIZE THE SNOWMAN RESULTS

To have a sustainable effect for owner-managed SMEs in the Baltic Sea Region the SnowMan tools should be part of the regular work in as many intermediaries as possible when promotion non-technological innovations in the companies

Spread the word

Inform other SME support organisations in your region about SnowMan and offer trainings. Set up regional networks to boost the innovation capacities of SMEs in your area !

1

2

3

Follow-up & Renewal

Conduct refresher-training courses on the topic of non-technological innovations and the SnowMan approach; meet regularly with other stakeholders in the region

Measure impact

Measure the performance before and after consultation together with the owner to realise the impact and stay motivated!

Content

1. Introduction.....	3
2. Segmentation, roles and responsibilities.....	5
2.1 Intermediaries	5
2.2 Higher Education Institutions	6
2.3 Owner managers	6
2.4 Other stakeholders	7
3. Elements in the overall strategic plan for institutionalization	8
<u>3.1 Phase 1</u>	8
3.1.2 Internally in the intermediary project partners	8
3.1.3 Internally in the HEIs	8
3.1.4 Supporting elements for institutionalization	9
3.1.5 Train-the-Trainer	9
3.1.6 Road trip.....	10
<u>3.2 Phase 2</u>	10
3.2.1 The counselling process and the platform.....	10
3.2.2 The counselling process and evaluation	11
3.2.3 Involvement of more INTs	11
3.3 Phase 1 & Phase 2: Catalogue with useful activities - Increasing external awareness	11
Activities to support transnational cooperation.....	12
3.4 To sum up	12
4. Follow-up system and overall implementation.....	14
4.1 Organization	14
4.2 Data	14
4.2.1 What should be measured and how?	15
4.2.2 Templates with evaluation questions to all who participants	15
5. Country specific conditions, terms and plans.....	16
5.1 Lithuania	16
5.2 Poland.....	18
5.3 Finland	20
5.4 Denmark	22
6. Executive Summary	24

1. Introduction

Owner-managed companies are an important part of the industry in the EU. In many ways the management-assignment is more complex in owner-managed companies – e.g. history, family and tradition play a special role. At the same time there is little or no tradition of using external counselling from intermediaries. Over three years the SNOwMan project developed totally new types of tools and methods, with a specific focus on *owner managed smaller companies within production with 5-50 employees* creating value for both owner managers and intermediaries. Throughout the project the focus has been on the challenges and needs for this specific part of SMEs to enhance non-technological innovation and how to strengthen the interactions and processes for intermediaries and owner-managers to promote cooperation. Non-technological innovations are innovations that are not product-related, but process or organizational innovations, like marketing. These innovations have a great potential for small and medium sized enterprises and are therefore of relevance. And until this point models and tools are invented with a wider target group than in the SNOwMan project. This makes the results from the SNOwMan project unique for both owner-managers and intermediaries.

The outcome from the SNOwMan project and the subjects for the strategic plan are two Toolboxes: The Counselling toolbox and the Supporting toolbox:

The counselling toolbox is a 6-step counselling process concept developed together with and to the benefit of owner managed companies. It consists of a digital platform with interactive templates, guidance, and procedures. A spider web tool is included, which give a formidable overview of business-related challenges for the owner managed company. It qualifies and strengthen the counselling process, the cooperation between the intermediary and the owner manager. A specific action plan is a good management tool for the owner managed company and using of the 6-step model increases business results.

The supporting toolbox are important to secure a proper institutionalization of the counselling toolbox. It ensures that the intermediaries get the right competencies through a train-the-trainer course program. It qualifies the intermediaries and give them the possibility of using the 6-step counselling process to the benefit of the owner managers and of the intermediaries themselves. Also, future intermediaries are being educated through curriculum and VET modules. The different learning activities are all operated by the HEIs.

The supporting toolbox consists also of a business model guideline targeted intermediaries to professionalize and strengthen their own business.

Finally, to strengthen the cooperation and knowledge of each other guidelines for networking between intermediaries and owner managers are developed. In many aspects there are no tradition of the use of intermediaries in smaller owner managed companies – bringing the two groups together can reduce this barrier.

Originally, the intention was to create two separate strategic plans for institutionalization: One plan for the counselling toolbox and one plan for the supporting toolbox. The Work packages Leaders has decided that a merger of the two plans into one is more beneficial for the sustainability, as the two toolboxes are

in many ways mutually dependent and connected. Ultimately, the institutionalization process can be conducted more effectively due to the merger of these two plans.

It will be appropriate to distinguish between two time perspectives in this Strategic Plan for institutionalization:

Phase 1: Until project closure (31.12.2020)

Phase 2: After project closure / the long run

Focus in Phase 1 is on concrete actions to be taken by the project partners to secure the best possible institutionalization. Focus in Phase 2 is on the long run organization and operation of the toolboxes. This will be addressed specifically in section 5. In the other parts of this Strategic Plan focus will mainly be on the actions to be taken in Phase 1.

The target groups of this strategic plan are the groups who play the main roles in the institutionalization in Phase 1: The project partners and the owner-managed companies. In paragraph 2 the roles of the intermediaries and HEI will be described, the owner-managers' specific needs, and which other stakeholders who can play a role in the institutionalization process. This segmentation and role description will be used throughout this strategic plan and across countries.

To ensure the best possible application and use of the developed tools and methods, it is critical and most important to institutionalize the new types of instruments, i.e. establish the SNOWman approach as a new regular way of supporting smaller owner-managed companies in the area of non-technological innovation. The overall aim of this strategic plan for the final institutionalization is to ensure that the processes will continue to be offered in a qualified, consistent way ensuring long-term results.

The ambition is that the new tools become the intermediaries' preferred choice and that the tools are spread among other intermediaries in the partner countries.

The specific aims of this strategic plan for institutionalization are according to the PD:

- Ensure that all intermediaries within the partner-organizations are confident with the counselling and the supporting toolbox and are using the tools when appropriated.
- Set a path for the intermediaries to get a deep knowledge of the support possibilities for the developed tools in the train-the-trainer seminars and encourage them to keep using the developed skills in the daily consultations of owner-managers (if the context is non-technological innovation).
- Develop strategies for the further institutionalization, dissemination and promotion of the counselling and the supporting toolbox, e.g. at meetings, conferences, at their website and their network activities.¹
- Develop a strategy that encourages the HEIs to add the tools to the relevant curricula and lifelong learning activities.

This strategic plan for the institutionalization of the counselling toolbox and the supporting toolbox has been created in a transnational working team with members from all countries and partners (both intermediaries, HEIs and the Hanseatic Parliament).

¹ Some of these activities are expanded in the Strategic Plan for Dissemination and the Communication Plan.

2. Segmentation, roles and responsibilities

In order to implement this strategic plan successfully, it is particularly important to understand the roles, responsibilities and needs of the target groups or segments, who plays a role in the institutionalization of the counselling and the supporting toolboxes. There are four distinctive groups, who play completely different roles in the institutionalization. Intermediaries (INTs) and the Higher Education Institutions (HEIs) both plays very active and obligated roles. The cooperation between INT and HEI is essential. The owner managers (OMs) are the target group that benefits directly. OMs are the actors that need to be convinced of the benefits for their companies participating in the counselling process – going through the 6-step process.

The following four segments are described below:

1. Intermediaries (INTs): Roles, responsibilities and benefits
2. Higher Education Institutions (HEIs): Roles, responsibilities and benefits
3. Owner Managers (OMs): Benefits and special needs.
4. Other stakeholders: A list of these actors (just to illustrate the complex environment).

2.1 Intermediaries

The INT-project partners have a specific responsibility in order to "walk the talk". In all four countries, the INT-partners must implement the results of the SNOwMan project in their own organization. All seven INT-partners are making good progress here. Focus ahead for the INT-project partners is to spread and implement the Counselling toolbox in sister-organizations and among other INTs.

Across the countries in the Baltic Sea Region, both public and private consultants and intermediaries work together with small owner-managed companies in order to improve their business plans, structures and processes. For the consultants, the companies are interesting as a group of clients to work with. There is still an untapped potential for "the whole counselling sector" (both in the public business support system and among private consultancies). The intermediaries indeed have the possibility to get a better access to the owner managers with the new tools and processes tailor-made and proven to create value. Business consultancy is characterized by a high degree of competition – mainly in the private sector. Implementation of the results from the SNOwMan project and using the 6-step model is a competitive advantage for INTs.

The tools and methods from the SNOwMan project offer several benefits to the intermediaries – the main unique selling points are:

- Easier access to small owner-managed companies.
- Proven concept – both tools and processes.
- More customers/clients and thereby strengthening their business.
- Even more professionalization of the consultancy processes.
- Knowledge, internationalization, and networking.

2.2 Higher Education Institutions

Entrepreneurship, innovation, and business development are prioritized throughout the education system in many countries. The HEIs are driven by multiple goals – some of these goals can benefit directly from a successful institutionalization of both the counselling and the supporting toolbox, such as:

- Teachers' knowledge regarding different strategies, tools, processes, knowledge about non-technological innovation and the business in owner-managed SMEs are strengthened.
- New curricula and educational elements for students. They will be more qualified for working as intermediaries with owner-managed companies.
- R&D activities with the local business environment.
- Case materials with wide applications.
- Increased cooperation and interactions with local enterprises.
- New lifelong learning programs.
- Train-the-trainer courses.

The HEI project partners have a specific responsibility for offering and provide T-t-T courses for INTs and potential "INTs-to-be". This both as lifelong learning activities and curricula in the various study programs offered by the HEIs. An assumption or a condition for successful institutionalization is continuously T-t-T courses offered by the HEIs project partners.

It is obvious that a successful institutionalization demands a remarkably close cooperation between INTs and HEIs – the roles and assignments are mutually dependent. The two parties cannot fulfill their goals in a proper way without continuous cooperation.

2.3 Owner managers

The business structure in the partner countries are (as in the EU as a whole) characterized by a high percentage of SMEs – many of which are owner-managed and many with 5-50 employees. Many owner managers do not have a tradition for using business intermediaries – they are driven by passion, strong commitment, and loyalty to their company. If they have worked with business intermediaries, it has not always been successful, as many of the existing counselling tools have been developed for large enterprises with a professionalized management group. These existing tools are often not adapted to the needs of smaller owner-managed companies, so counselling processes do not lead to a successful outcome. Therefore, some SMEs developed barriers and prejudice towards counselling processes and intermediaries and they still exist today.

In contrast, the tools created in the SNOWMan project are developed specifically for and with owner managers. The Counselling toolbox offer a unique opportunity to strengthen the owner managers' businesses, raise awareness of the value and potential for non-technological innovation, and have the potential to increase revenues, productivity, and growth in the owner-managed companies.

One can argue that the owner managers are a kind of end-users of the platform – they are the target group that benefits from the institutionalization directly. The role they play in the institutionalization process itself is to increase the credibility of the tools by giving positive testimonials.

2.4 Other stakeholders

The list of other stakeholders is very comprehensive, as many types of organizations and institutions can benefit from the SNOWMan project and play a role in the processes. The other stakeholders represent very distinctive perspectives. The list below can give an idea of the types of other stakeholders that can be subject of further institutionalization efforts:

- Chambers of crafts, trade and commerce
- Industry associations
- Politicians
- Educational institutions, such as vocational schools or training centers
- Interreg – EU
- Civil society organizations
- SME networks and support institutions

This list illustrates the complexity of the environment in which the counselling and supporting toolboxes are being institutionalized, and the kind of different organizations that influences the processes. All these other stakeholders are important mainly as creators of awareness. They will primarily be incorporated in the dissemination and communication plans and their involvement must consider country-specific particularities.

3. Elements in the overall strategic plan for institutionalization

As mentioned in the introduction we operate with two time perspectives in this strategic plan for institutionalization:

Phase 1: From September 1 until project closure (01.09.2020-31.12.2020)

Phase 2: After project closure (01.01.2021-)

Phase 1 is in the short run and in this period, there are still project funding for the activities.

Phase 2 is the long-term perspective, where the activities are implemented without project funding.

In each country, a supporting team is established to follow the institutionalization and the implementation of the initiatives in Phase 1. All partners, both INTs and HEIs are represented with one representative from each INT on a management level, one or two representatives from each HEI, two INTs from the working team and a representative from PP5.² The WPL team and PMT follow the work of the supporting teams, and are responsible for the approval of this strategy.

3.1 Phase 1

3.1.2 Internally in the intermediary project partners

The first step for a successful institutionalization is that the intermediary project partners walk-the-talk themselves. The use of the toolboxes in most counselling processes involving owner managers and non-technological innovation must be incorporated locally at the seven intermediary project partner institutions. This is an INT task and will be prepared and implemented by the Project Management Team before the project closure. The national supporting teams will follow up on this specifically in Phase 1 (in Phase 2 the Ambassador Corps takes over this task). INT management also has the obligation of sending employees from their own organization to T-t-T.

The intermediary project partners already cooperate with INT colleagues in the business service system (see paragraph 4) and with industry associations. The INT project partners will make country-specific plans on how the cases and success stories from the counselling processes with owner managers will be communicated to both INTs and owner managers. This will create both pull and push effects. The issue will be at the top of the agenda at the first meeting of the Ambassador Corps.

3.1.3 Internally in the HEIs

One person per country who is also a member of the supporting team (or appointed by the supporting team) must be responsible for the daily operation of the main platform. The HEI member of the supporting team is primarily responsible for continuously working on integrating the results of SNOWMan in curricula and lifelong learning activities across their own institution.

² In the PD, two distinctive supporting teams were planned – one for the Counselling Toolbox and one for the Supporting Toolbox. As the Strategic Plans for institutionalization for the two toolboxes have been merged, the supporting teams are also being merged.

The focus on the relationship management between the intermediary and the owner manager is important. The intermediary needs to be encouraged to track the progress of his or her client and to keep the counselling process ongoing. This topic is part of the train-the-trainer courses in all countries. The feedback of the T-t-T test is taken into consideration in the planning of the T-t-T for the autumn of 2020.

The question of resources must be addressed. What could be a sustainable business model after the project closure? E.g. how should the train-the-trainer courses be funded? Local funding, a fee from the participants or a third business model? Concerning this issue there might be huge differences between the countries, so this is a challenge that must be addressed locally. It is recommended that the issue is discussed transnationally in the Project Management Team, in connection with the meeting in October and that the HEIs have chosen a suitable business model in Phase 1.

In many aspects, HEIs also have a more cultural task – in some cases as role models. It is a possibility that the HEIs consider if it will fit in each HEI's mindset and values to (on an individual basis) operate with some "institutional 6-step process entrepreneurs". These persons can be researchers or lecturers, who are already involved in the SNOwMan project or who already work with SMEs. In addition, employees that work with student incubators can also act as "institutional 6-step process entrepreneurs". The HEIs are already strongly involved in education towards entrepreneurship and can foster the cooperation with other HEIs, the local innovation system and companies (both larger companies, SMEs and owner-managed companies). These "institutional 6-steps entrepreneurs" are relevant ambassadors for institutionalizing the toolboxes both internally and externally.

3.1.4 Supporting elements for institutionalization

All project partners have given input regarding the kind of support that facilitates the institutionalization process across countries. The gathered supporting initiatives are shown here and serve as important "check-points" for all participants in the SNOwMan project and for the Ambassador Corps, right after the project's closure.

3.1.5 Train-the-Trainer

In order to ensure a successful institutionalization of the counselling toolbox within the intermediary organizations, it is very important to keep up regular training courses, in which the intermediaries' personnel continues to learn about the challenges that owner managers are currently facing (categorization of problem) and how the counselling toolbox can support new business solutions. Intermediaries should know what kind of challenges the counseling toolbox could solve and which it cannot. Train-the-trainer courses should be offered one more time in Phase 1 and thereafter, at least once a year in every country. The first T-t-T courses in 2020 were "Test-courses". The T-t-T in autumn 2020 are planned in cooperation between HEIs and INTs – The HEIs are responsible for the course itself, taking the evaluation from spring 2020 into consideration in the planning process. The INTs have the main responsibility for recruiting participants to the T-t-T. Where possible, the active participation of experienced INTs in conducting the training is advisable. The ambition is that the participants in the T-t-T

in Autumn 2020 are from a wider target group than in the test T-t-T in Spring 2020, e.g. in geography, organization.

If it is interesting for the INT, the HEIs have the possibility of introducing a certification for the 6-step process in Phase 2.

3.1.6 Road trip

In all four countries a road trip to sister-organizations and relevant participants are completed, with visits and contacts to relevant participants in the T-t-T. INTs are responsible for the road trip, but HEIs can participate in this activity as well.

An effective institutionalization should contain at least three elements:

1. Phase 1: Inform other SME support organisations in your region about 6-step process and offer T-t-T for the staff. Well-qualified consultants who are employed by the intermediaries, maybe together with HEI representatives, are the best way to realise a permanent effect.
2. The lead partner (VIA) will also establish a LinkedIn group for all who have passed the train-the-trainer course before October 2020 to stay connected.
3. Phase 1 and Phase 2: Measure the performance before and after consultation with the owner manager to realise the impact of the counselling toolbox. To see the results and the change will also have a motivational effect on the consultants working with this.
4. Phase 2: Conduct refresher-training courses on the topic of non-technological innovations and the SNOWMan approach. Keep up to date with the latest development on the 6-step process platform. Use existing regional networks of INTs to exchange information and boost the innovation capacities of smaller owner-managed companies in your area.

3.2 Phase 2

In Phase 2 the Ambassador Corps will be the main organization (see paragraph 4). In Phase 2 focus are on the listed issues:

3.2.1 The counselling process and the platform

The ongoing implementation of the platform is essential, and if necessary, there will be a possibility for further improvements. If the intermediary discovers that functions or topics are missing, they will have the option of suggesting an update for the creators of the counseling toolbox, so situation- or country-specific adaptations are possible (see more in paragraph 4). Later, recertification or feedback sessions will be organized, where intermediaries who have already had experience with the counseling toolbox can share and improve their knowledge if elements of the toolbox have been changed. This is also an excellent opportunity to give feedback, to make suggestions for the improvement of the toolbox and to reflect on and recapitulate the use of the toolboxes. The Ambassador Corps will put this in the agenda in 2021.

3.2.2 The counselling process and evaluation

It is especially important to gather feedback about the usability, functionality, and overall experience with the counselling toolbox, both from INT and OM, especially to ensure the value-creation among owner managers. This feedback and especially success stories need to be communicated among the community. Intermediaries are more likely to use the counselling toolbox, when the potential is made clear to them. A proven concept is a strong motivator.

3.2.3 Involvement of more INTs

A strong focus on the recruitment of owner managers as clients for the counseling process is necessary. There are guidelines on how to explain the value proposition to owner managers, as well as guidelines and webinars on organizing group workshops for owner managers using the counseling toolbox. These formats help to secure a flow of new customers that are interested in using this new counseling toolbox and will be incorporated in the dissemination plan.

The collection of regional success stories must be updated and expanded on an ongoing basis by the INT partners, it can be useful in several aspects. E.g. the LinkedIn group is a space, where knowledge about these success stories can be exchanged. Intermediaries can also interact with each other if they face problems, so the intermediaries can help each other out and share their experiences. Intermediaries can individually define the scope of offered services related to the implementation of non-technological innovations. An on-going implementation on the platform will address this issue.

3.3 Phase 1 & Phase 2: Catalogue with useful activities - Increasing external awareness

To increase the awareness of the tools and methods, it is essential to add information about the platform and its effects in various medias. Sharing the good stories and cases is essential. The catalogue covers all the different channels that the partners can use towards the different target groups:

- Promotional articles
 - Partners webpages
 - The webpages of other INT organizations (e.g. the new participants)
 - Business magazines
 - Magazines, papers and websites focusing on innovation, strategy and business development
 - Owner managers' websites
- Conferences
 - Business events and conferences
 - Events for entrepreneurs
 - Networking events hosted by INT with focus on INT-subjects
- Ideas specifically for HEI:
 - Creation of a scientific club to disseminate knowledge about the 6-Step Process, and its effects and to encourage students to learn more about the toolboxes and their possible implementation.
- Newsletters
- Social media campaigns

The above issues are addressed further in the communication plan.

Activities to support transnational cooperation

One of the aims of the SNOwMan project is to strengthen transnational cooperation, so that the project acts as a springboard for entering a committed cooperation, mostly in the form of transnational exchanges of good practice, common problem solving and the exchange of staff. Through the whole project period of three years, the work among partners has strengthened the transnational cooperation among institutions and among individuals. The Project Management Team will therefore, before the project closure:

- Establish an Ambassador Corps (see paragraph 4)

In addition, the Project Management Team will consider and discuss whether to:

- Create a special interest group or LinkedIn group to support each other, ask and answer questions and share good practices, or instead give the Ambassador Corps this task
- Create a network group for the trained intermediaries (after a train-the-trainer course). Both transnational and national membership

While using the counselling toolbox it is essential that the overall online experience with the 6-Step Model and the Spider Web Tool is functioning without problems. This is ensured with the effective follow-up system (see paragraph 4). By showing the effectiveness of the toolboxes and the value created by using the 6-Step Model, both the owner managers and the intermediaries are included in the promotion. That is the cornerstone of a successful institutionalization and in combination with securing and promoting competencies in using the counselling and supporting toolbox among the intermediaries, a successful and sustainable future use is established.

3.4 To sum up

Below is an overview with the key actions in the institutionalization process.

Topic	Period/Deadline	Responsible
Further implementation of the platform and toolboxes in the partner organizations	Currently (Phase 1)	INT partners
Establishing the national supporting teams	September 2020 (Phase 1)	VIA in cooperation with all partners
A LinkedIn group for all participants in T-t-T are established	September 2020 (Phase 1)	VIA in Phase 1 – Ambassador Corps in Phase 2

Designate one person per country who is responsible for the functioning of the main platform	September 2020 (Phase 1)	All HEIs
Road trip with the purpose of recruiting to the T-t-T	September-October 2020 (Phase 1)	INTs (assisted by HEIs)
T-t-T course (in each country)	November 2020 (Phase 1)	All HEIs
Making plans for Curricula/lifelong learning activities in 2021	Phase 1	All HEIs
Be sure that data are gathered – measure the performance before and after consultancy with OM. Establish procedures for implementation	October 2020 (Phase 1)	VIA in Phase 1 Ambassador Corps in Phase 2
Establishing the Ambassador Corps (AC) with a participant from each partner. AC will meet at the final conference	October 2020 (Phase 1)	VIA as project leader, approved by PMT
The Business models for T-t-T/lifelong learning activities has to be applied	November 2020	HEIs in cooperation with INT (full implementation in Phase 2)
Eventually implementation of a Certification for the 6-Step Process	Phase 2	Ambassador Corps
Ensuring feedback from INTs is used	Phase 2	Ambassador Corps

The actions can and will be expanded with other actions from the catalogue on a national basis – see also paragraph 5. These other initiatives will be incorporated in the country specific plans for institutionalization, if applicable. They will be addressed at the same time by the supporting teams and later by the Ambassador Corps following the implementation process.

Finally, it is essential for any institutionalization process, that the management of the organization is engaged in the process in both Phase 1 and Phase 2. The implementation of a new consulting method as the one produced by the SNOwMan project requires commitment by the leadership. They need to convince and communicate the reasons for this new approach, build consensus and enthusiasm and realize dedication of the staff to actively use this method.

4. Follow-up system and overall implementation

It is crucial for sustainable results and continuing implementation – also after the project closure – that a functionally and agile follow-up system is designed and implemented. An Ambassador Corps is established in Autumn 2020 for this purpose. The Ambassador Corps has two main tasks as described in the project description: To continue the institutionalization in their regions (implement and continuously adjust the national plans described in paragraph 3 and 5) and to follow the use of the toolboxes.

4.1 Organization

The organization of the Ambassador Corps is small and agile. It includes one representative from each project partner and is led by PP1 (VIA). Terms of Reference is developed in September 2020 and presented at the PMT in October 2020.

The Ambassador Corps meet every 6 months – first time in spring 2021. The successful work of the Ambassador Corps relies on data. Several types of data are the main input to the decision making of the Ambassador Corps. With valid data on how the toolboxes are implemented, institutionalized, and operating, the Ambassador Corps can do its work properly.

4.2 Data

As mentioned, the Ambassador Corps should meet regularly, but in between these meetings, the leader of the Ambassador Corps (VIA) has some special obligations:

- Choosing one person who is overall responsible for the functioning of the main platform, who can give transnational support (can be from other partners) and be responsible for communication with the hosting organization
- Unlocked access to platform after registration of the intermediaries – password generated automatically upon registration
- Maintaining relationships by sending regular information to registered people

On a meeting in October 2020 before closure, the Project Management Team (PMT) is advised to discuss how the follow-up-system and the “on-going” institutionalization/implementation can be funded. In addition, it is recommended, that the PMT take action on:

- Approve the Terms of Reference for the Ambassador Corps
- Designate the members of the Ambassador Corps
- Discuss how data is gathered in the best way
- Discuss the need for supporting organization/supporting activities and how it is being financed
- Give inspiration and discuss alternative business models for T-t-T after closure
- Whether to have a recertification round after e.g. 2 years.

4.2.1 What should be measured and how?

The work of the Ambassador Corps relies on data. Nationally, the project partners are responsible for gathering the following data:

- Quantify how many have participated in the train-the-trainer course (HEI)
- Quantify how many owner managers have been advised with help from elements in the counselling toolbox (and to what step if they have not completed all 6 steps) (INT)
- Detailed evaluation from both owner managers and intermediaries (INT)
- All data accumulated and compared across partner countries
- It is suggested to make a survey or evaluation after two years to determine the value created to the businesses of the owner managers. (HEI/INT)

4.2.2 Templates with evaluation questions to all who participants

Continuously building knowledge of the value, implementation and experiences with the 6-step model is an essential part of the successful institutionalization. Templates are available for collecting all the data mentioned above, e.g. the T-t-T courses are always evaluated by the INTs, who participate.

An important part of the continuous improvement of the 6-Step Process in the interest of both the owner manager and the intermediary, is the gathering of data all the way through the 6-Step Process. The ambition is to use the data in a learning perspective, so that the work is qualified from several perspectives throughout the whole process – not only by the end. This methodology ensures that the 6-step model is evaluated even though the process isn't completed but e.g. stops halfway after step 3 or 4. Using evaluation questions after each step ensures that data and learning-points are collected, and that the process will benefit from it on an ongoing basis.

All the different types of collected evaluation data will continuously be used nationally, and every six months the Ambassador Corps will analyze the collected data across countries and implement necessary adjustments.

5. Country specific conditions, terms and plans

In this section, four national strategic plans for institutionalization demonstrates how the toolboxes are incorporated in revised strategies and business plans throughout the seven intermediary partners, and how all the project partners implement and institutionalize the toolboxes on a national basis. Paragraph 3 serves as the overall transnational plan with identical initiatives, but also as a catalogue for inspiration – realizing that there are differences among the four countries. Most of the initiatives described in this section are planned and implemented in Phase 1 (before project closure).

It is essential that all INT partners select at least one person, who is responsible for the familiarization of new intermediaries with the Train-the-Trainer course, to ensure the dissemination of the 6-Step Model.

5.1 Lithuania

Supporting SMEs has been a priority in Lithuania in the latest years. In 2019 the country reported 197,788 SMEs, so 99.8% of all companies in Lithuania were classified as SMEs. 755,158 workers were employed in these SMEs, meaning 75.9% of the Lithuanian workforce is working in SMEs. They added a total value of 14.0 billion € to the Lithuanian economy in 2019, which was 69.4% of the total value added to the Lithuanian economy that year.³

The counselling toolbox and the supporting toolbox developed within the SNOwMan project are excellent additions to the SME support in Lithuania. This country-specific institutionalization plan helps create the right conditions for the profitable use of the SNOwMan project results in Lithuania. Focus in this plan for institutionalization in Lithuania is on activities in Phase 1.

First, support for a better categorization of the problem is recommendable. Regular education or certification courses in this topic for intermediaries can help to make a successful institutionalization of the counselling toolbox happen. These courses will focus on the uniqueness of the problems that owner managers are facing in Lithuania and can help the intermediaries to provide better tailored solutions to the SMEs. Furthermore, this course for intermediaries will help tackle different kinds of problems and educate on what kind of challenges the counselling toolbox and supporting toolbox can solve and which they cannot.

A second starting point for a successful institutionalization is the collection of Lithuanian success stories from the use of the counselling toolbox and the supporting toolbox. These positive examples of the use of the tools have a strong effect on the acceptance of the intermediaries' offers by the owner managers. They serve to show the full power of the counselling toolbox and the supporting toolbox and to demonstrate how companies can achieve a positive change for themselves, their owners, their employees and other stakeholders.

A good start for institutionalization efforts is to target consultants from science and technology parks and chambers of commerce, industry and crafts. In addition, cluster coordinators who would be interested in

³ 2019 SBA Fact Sheet Lithuania

using the counseling toolbox is a relevant target group in Lithuania. These intermediaries have the necessary contacts and relationships to bring the counselling toolbox closer to as many companies as possible. The inclusion of these groups of people also offer the possibility to spread the counselling toolbox and the supporting toolbox in the associated institutions. Thus, additional efforts should ensure that business associations and confederations in Lithuania are encouraged to use the project results. Especially cluster coordinators are an important additional target group for the institutionalization efforts within the SNOWMan project. Through advanced training courses the Lithuanian partners have access to the coaching of cluster coordinators. Sessions specially organized for these coordinators will be a good way to show them how they can benefit from the counselling toolbox and the supporting toolbox. The same can apply to representatives of technology and science parks. An information session for this group will also contribute significantly to the institutionalization of the SNOWMan project results.

Furthermore, the conduction of Train-the-Trainer courses will be a strong support for the institutionalization efforts in Lithuania. These Train-the-Trainer courses will be offered for representatives of the general and specific target groups. With the help of these Train-the-Trainer courses the list of active users of the counselling toolbox will increase and it will allow them to evaluate, if the toolbox is really relevant for them.

Additional medial institutionalization support will be generated by the extensive use of social media channels, advertising for the counselling toolbox and the supporting toolbox on the business-oriented webpage inovacijos.lt and special promotional speeches will be held on partners' events in order to present the toolboxes to the right target audience.

5.2 Poland

The support for SMEs in Poland has intensified in the latest years. In 2019, Poland had a total number of 1,729,233 SMEs, representing 99.8% of all Polish companies. They employed 6,125,825 employees, this way providing 67.1% of all Polish private jobs and adding 119.5 billion € of value or 51.4% of the total GDP to the economy.⁴

In Poland, SME support includes:

- Information points
- Special positions in offices
- Trainings and conferences
- Subsidies and loans

For the further support and the successful overcoming of business challenges the counselling toolbox and the supporting toolbox are excellent consultation and development tools. The concrete realization and implementation in an institutional context in Poland will help to achieve long-lasting, positive and nationwide changes in the business prospects of participating SMEs. It is worth encouraging companies to use the Spider Web Tool, because presenting your company's strategy can be helpful when joining an application for investment financing, an interesting project, etc.

The national situation in Poland requires a country-specific institutionalization plan, mostly due to two major challenges:

- 1) Difficulties in bringing intermediaries based on public funding together with market intermediaries.
- 2) General reluctance to the formation of associations and networks, extra bureaucracy, and a generally low level of trust.

It is important to understand these challenges and to consider the effects on the general institutionalization plan and the Polish one. Entrepreneurs in Poland are reluctant to use especially intangible support, often only looking for financial support. In Poland, the term non-technological innovations is not widely known, entrepreneurs often do not know what this means and thus are not interested in non-technological innovations, and in particular are not willing to pay for them. There is a need to show them how useful and profitable these innovations can be. This can be done during special business meetings, like periodical business breakfasts with advisors, coaches, events for entrepreneurial organizations, special conferences for consultancy agents where the tools and their possibilities can be presented. Entrepreneurs or coaches could share their positive experience connected with incorporating the tools.

In Poland, there is not a strong tradition of consultancy and many entrepreneurs, developing their own companies, believe that they do not need someone to advise them. A small social media campaign to promote consultancy will be launched. Short films can promote SNOWMan's toolboxes on the profiles of entrepreneurial agencies, clusters, consultancy agencies. Live online meetings can be organised by intermediaries to answer entrepreneurs' questions and to encourage them to get involved in non-technological innovations.

⁴ 2019 SBA Fact Sheet Poland

Without at least some trust in each other, the consultation with the counselling toolbox and the supporting toolbox will not make much sense. Nevertheless, trust cannot be taken for granted, it needs to be developed and to be built up. Therefore, the SNOWMan project will have a special focus on the country-specific institutionalization plan, in order to create a trustful environment with a positive atmosphere to support networking on a company basis as well.

The collection of positive consultations and its results is a good start for the institutionalization in Poland. This collection can be very powerful in demonstrating the positive changes due to the use of the counselling toolbox and the supporting toolbox. Therefore, a key component of the Polish institutionalization plan is the editing, formatting and storing of positive consultations that took place in the past. At the same time, the consultation process needs to be presented in a way that shows the owner manager how unbureaucratic the process is.

The barrier between public and private business intermediaries and the difficulties in realizing exchanges of materials, good practices, etc. among them is also important. The solution to this hinderance is the precise dissemination of the project results. First, the public intermediaries shall preferably get access to the counselling toolbox and the supporting toolbox and start conducting consultations with businesses. These interactions create new success stories complementing the existing success stories. After the private business intermediaries notice this, they will have a great interest in trainings in the counselling toolbox and the supporting toolbox and they will institutionalize the project results in their organizations.

Another important point of the institutionalization strategy in Poland is the further dissemination and publicity of the project results. This is carried out in the form of a monograph, which is written and published by our Polish partners. With the help of this monograph the application possibilities of the tools can be described even better. It will also contain the address of the platform and active links that will lead interested parties directly to the project. The publication will not only go to other scientists, but also to science and technology parks, business incubators and other intermediaries.

One focus will also lie on the organization of conferences, speeches and presentations at the conferences, lectures/workshops for students, meetings with entrepreneurs and other special events like the “Evenings with economics” or the “Meetings with management” taking place regularly at the campus of the project partner Gdansk University of Technology. These events will support the institutionalization process by enlarging the group of people aware of the counselling toolbox and the supporting toolbox, so more people become interested in the usage and potential of the developed toolboxes.

5.3 Finland

In 2019, Finland reported in total 228,562 SMEs, meaning 99.7% of all companies in Finland were classified as SMEs. 962,785 workers were employed in these SME, so 65.2% of the Finnish workforce is working in SMEs. They added a total value of 63.5 billion € to the Finnish economy, meaning that they are responsible for 59.6% of the total value added that year. ⁵

The testing in Finland has shown that the tool has a good potential in complementing the work of business consultants and other intermediaries. It has also shown that owner managers and HEIs are relevant target groups in the institutionalization process.

The online tool, and the outstanding user experience that characterizes it, provides the greatest support for institutionalization in Finland. The idea behind the institutionalization strategy in Finland is to lower the entry barriers for consultants and owner managers to use the tool for their first playful use. This way the target group can get to know the counselling toolbox and the Spider Web Tool in independent training. In Finland, the online tool has a great potential to further institutionalize the SNOWMan project's results.

Another important institutionalization support is provided by positive examples of the counselling toolbox. These are at least as important in Finland as in the other partner countries. It has been shown that these positive examples show the greatest potential in demonstrating the added value of using the developed tools.

The Federation of Finnish Enterprises in the Häme region has made a plan for the institutionalization of the tools of the SNOWMan project as follows (Phase 1):

- Offering the counselling toolbox to our advisors free of charge.
- Sharing an official SNOWMan project webpage to our local partners and straight to the entrepreneurs so they can use the tool directly after the translation process is finished and the page is in Finnish.
- Sharing the information about the tools at our local organized events in the autumn 2020, if the objective of the program of the event allows it.
- Sharing the tools and knowledge about it in our newsletters and in our newspaper during the autumn 2020.

Finnish Institute for Enterprise Management has made an institutionalization plan for SNOWMan and some activities have already been put into practice. Actions for institutionalization (Phase 1):

- Writing, publishing and sharing a blog post and article about how the SNOWMan project and the online tool will help companies to reform their operations
- The 6-step Counselling Process and the Spider Web Tool will be presented in training materials for Specialist Vocational Qualification in Leadership and Business Management and Specialist Vocational Qualification for Business Advisers
- Sharing the information on the SNOWMan online tool development: meeting with business consultants and development organisations
- Sharing information about the SNOWMan online tool: meeting with business trainers in FIEM

⁵ 2019 SBA Fact Sheet Finland

- Sharing information about the tool in our networks (Team Finland Häme-network)
- Sharing the link for the online tool on our website

An additional catalogue, showing useful ideas on how to address other stakeholders and INTs/HEIs outside the groups of partners does not need to be translated into Finnish language, as already more than 200 pages of comprehensive information have been translated into Finnish. This information is sufficient for the Finnish partners in order to conduct a successful institutionalization of the SNOWMan project.

5.4 Denmark

In 2019, Denmark had a total number of 227,102 SMEs, representing 99.7% of all Danish companies. They employed in total 1,149,785 employees, this way providing 64.1% of all Danish private jobs and responsible for 60.8% or 91.0 billion € of value to the Danish economy.⁶

In Denmark, a press release will be produced by the Communication Team, as a frame for the local partners. The local partners will then further distribute the press release. The local partners will also produce a plan for contacting the relevant media institutions. The whole process will be supported, supervised and reviewed by the Project Management Team.

As a next action the Project Management Team in Denmark will organize contact with the local INTs by info-letters or what the partners normally use to contact the INTs. The purpose is to invite the INTs and other interested and relevant parties to seminars, followed by Train-the-Trainer-sessions. By this, the relevant target group can be contacted, and the potential of the SNOwMan project will be explained in detail by the Danish partners. By these promotional events the target group may even be enlarged as the Danish partners will act as a kind of ambassadors and promote the concept in the whole country.

In Denmark, strict follow-up on the use of the counselling toolbox and the supporting toolbox will take place. In order to get familiar with the experience with the developed tools and practices, a questionnaire will be sent to the partners, to measure the INTs' and owner managers' satisfaction and performance. This will be sent to the Project Management Team and reviewed and evaluated. This is very important and necessary to gather knowledge and experience to further develop the concept.

Similar to the Finnish institutionalization plan, the partners in Denmark are eager to make use of the digital portal, which is the prime element of the SNOwMan project. This digital portal will be spread among all possible communication channels of the Danish partners and bring greatness to Denmark.

As described above, the target group is primarily the INTs who can use the concept when they counsel the owner managers. For further segmentation, they can be divided into several subsegments:

- The intermediaries working for Businesshub Central Denmark. They cooperate with the other business hubs (one in each region) and will present the concept to them.
- There is a Danish Executive Board for Business Development and Growth, an initiative of the Danish government to unite the various efforts within business promotion. We are considering if and how we can present to them.
- The intermediaries working for local Business Development Centres. We will present to them in two or three steps:
 - Some have been invited to participate in the first Train-the-Trainer on July 2nd.
 - The next step is to present it to the other local Business Development Centres, probably through visits to them
 - The 3rd step is to invite to Train-the-Trainer-sessions in the autumn. We have an organization called MEA, and will setup the events under this organization. Intermediaries, employees at the Job canters, Business Schools and employees from the municipalities can also participate.

⁶ 2019 SBA Fact Sheet Denmark

- To reach out for local Business Development Centres elsewhere, we cooperate with DEF Danish Business Development, an organization for the local Business Development Centres:
 - We had agreed to present the concept on a seminar in May, but it was postponed until the autumn. We do not yet know when this will take place.

To sum-up in Phase 1 the road trip will be planned and executed with the purpose of strengthening the knowledge about the 6-Step Model and the toolboxes **and** to recruit participants for the T-t-T.

An additional communication plan for the communication up to three years after the project ends is developed by the Danish partners in order to give good and constant support for the institutionalization of the project results. This will be especially important for the interaction with the HEIs, as in Denmark all relevant HEIs will be contacted by the partners in order to incorporate the concept in relevant courses.

6. Executive Summary

The Interreg project SNOwMan has developed new tools specifically for the qualification and support of both intermediaries and owner managers in the area of non-technological innovation. A counselling toolbox and a supporting toolbox are developed with special focus on owner managed SMEs with 5-50 employees.

The institutionalization of the developed tools and prevalence of the 6-Step Process is critical to ensure a continuing application and constant use of the incorporated instruments in the Baltic Sea Region.

Four segments play different roles in the institutionalization effort:

- Intermediaries (INTs)
- Higher Education Institutions (HEIs)
- Owner managers (OMs)
- Other stakeholders

The groups will all benefit from the project, but in different ways. Especially for the intermediaries and the work of business consultants the professionalization of processes is essential. HEIs can largely benefit from new cooperation means and new curricula, including lifelong learning activities. At the same time, the business prospects and revenues of participating owner managers are strengthened through detailed consultation and a shift of the focus to non-technological innovation as a growth enhancer.

The essence of this institutionalization plan is a catalogue with initiatives and activities that will ensure a successful institutionalization and additional country-specific implementation advice. The recommended activities contain both push and pull mechanisms. The first core idea is to ensure that the supporting toolbox, mainly the train-the-trainer training, is offered on a regular basis, and that the intermediary partner organizations integrate the counselling toolbox in their local strategy. Further adaptation of the tools alongside the tools they already have is possible and desirable. Second, different means of promotion for the local institutionalization are presented in detail and a focus on personal persuasion recommended. In the short run – before project closure – three specific initiatives are implemented in all four countries: Another T-t-T course, a road trip⁷ to increase awareness and recruit participants to the T-t-T and planned curricula for 2021 at the Higher Education Institutions.

All success stories from past consultations must and will be told to create and increase awareness. To maintain this ongoing institutionalization and to keep the processes alive, an Ambassador Corps is established. It is an agile organization that will ensure the transfer of cross border experiences, qualifying the national institutionalization in each of the four partner countries Finland, Lithuania, Poland and Denmark. These countries are similar in some aspects, but different in others. They have different business environments, different business service systems and what is especially important different cultures of SME support among owner managers. Therefore, general, and transnational institutionalization elements are complemented with country specific plans to ensure an ongoing use of the SNOwMan projects results and the 6-step process.

⁷ The road trip can be as physical meetings, online or other ways of contacting potential participants depending on the COVID-19 situation or other national circumstances.