SIYB Trainers’ Guide
ILO-SIYB Sri Lanka Project
SIYB
Trainers’ Guide

Developed by the
ILO-Start and Improve Your Business Project
Sri Lanka

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Introduction

This is the first edition of the SIYB Trainers Guide of the ILO-SIYB Sri Lanka project. The purpose of this Guide is to enable local SIYB trainers to plan and implement SIYB training activities for small-scale entrepreneurs.

The Trainers' Guide takes you step by step through the SIYB training cycle, enabling you to
- market SIYB training to your customers
- select SIYB trainees
- conduct a Training Needs Analysis
- manage the training logistics and conduct SIYB training interventions
- follow up on trainees
- monitor and evaluate the impact of the training effort.

You, the SIYB trainers are asked to test this Trainers' Guide over the coming months and give feedback on areas where you see room for improvement. The second edition of the Trainers' Guide, due to be published in end 2001, will reflect these recommendations and ensure that the document is fully relevant for your work in Sri Lanka.
1. OVERVIEW OF THE SIYB PROGRAMME

What is “SIYB”

The ‘Start and Improve Your Business (SIYB)’ Programme of the International Labour Organization is a system of inter-related practical management-skills training packages for small-scale enterprise owners and managers. It encompasses a range of cost-effective and practical training, monitoring and evaluation methodologies and instruments which were designed to meet best the management training needs of potential and existing small business persons.

The history of the SIYB programme

The SIYB programme has originated in a training package called Look After Your Firm” that was developed in the 1970s by the Swedish Employers´ Federation. In 1977, the Swedish International Development Authority (SIDA) funded a project for the ILO to adapt the materials to the needs of small-scale entrepreneurs in developing countries. The adapted training package was called “Improve Your Business“ (IYB) programme and successively introduced in over 70 countries.

In the early 90’s, an ILO technical cooperation project in Fiji embarked on the development of the “Start Your Business” (SYB) training package. SYB was soon adopted by ILO technical cooperation projects all over the world to complement the IYB training package and to meet the great demand from potential small-scale entrepreneurs who wanted to start their own businesses. In the late 90’s, yet another training package called “Generate Your Business Idea” (GYB) was developed by ILO to further complement the SYB training package and to assist potential small-scale entrepreneur to generate feasible business ideas.

The GYB, SYB and IYB training packages have been designed on the same conceptual platform. They are separate but inter-linked. In recognition of that effective inter-linkage, ILO markets these packages jointly under the label “SIYB programme”. Today, the SIYB programme is globally recognized as an ILO trademark.
Programme objectives

The overall or development objective of the SIYB programme is to contribute to economic development and to the creation of new and better jobs.

Within the framework set by the development objective, the first immediate objective of the SIYB programme is to enable local Business Development Services (BDS) organizations to effectively and independently implement business start up and improvement training and related activities for potential and existing entrepreneurs.

The second immediate objective is to enable potential and existing small entrepreneurs through these SIYB partner organizations to start viable businesses and to increase the viability and profitability of existing enterprises, and to create quality employment for others in the process.

Programme beneficiaries

The SIYB programme has two major target groups, namely
- direct programme beneficiaries
- intended programme beneficiaries.

Direct programme beneficiaries

The direct target group of the SIYB programme are local BDS organizations that are enabled through technical assistance from ILO to independently and effectively implement the SIYB programme over an extended period of time once project support has phased out.

As a general rule, ILO works with all types of BDS organizations, among them
- Governmental and Quasi-Governmental-Organizations
- Non-Governmental, not-for-profit Organizations
- Business Federations
- Trade Unions
- Profit-oriented business support services providers.

To qualify for collaboration within the SIYB programme, these potential partner organizations will be expected to have a clear mandate for, and a track record in, provision of training services for small-scale entrepreneurs. Furthermore, they are expected to have, or have access to, financial resources to maintain training activities
**Intended programme beneficiaries**

The intended programme beneficiaries of the SIYB programme are reached by ILO technical assistance *via* local SIYB partner organizations.

The intended beneficiaries are
- potential small-scale entrepreneurs
- existing small-scale entrepreneurs.

Since the GYB, SYB and IYB training packages are material-based, potential and existing entrepreneurs reached by the SIYB programme should be able to read and write, and to have the numeracy to make the basic calculations required in the exercises.

Furthermore, in the case of SYB, the potential entrepreneurs are expected to have the technical skills necessary to start the planned type of business.

Exceptions to these selection criteria for entrepreneurs apply, though. Several SIYB projects have designed simplified SIYB training packages that can reach out for semi-literate potential and existing entrepreneurs.

**Intervention strategy**

The SIYB programme follows an institutional approach. Based on the assumption that institutions do matter in the development process, the SIYB programme aims at building the capacity of local BDS organizations to effectively and independently implement SIYB training and related activities.

The SIYB programme reaches the ultimate beneficiaries of the SIYB regional programme, the potential and existing small entrepreneurs *via* these organizations.

The institutional approach of the SIYB programme enables the ILO to greatly enhance its own capacity to reach potential and existing entrepreneurs in large numbers and thus to have a considerable effect on employment creation. Rather then directly training entrepreneurs, ILO technical experts or certified master trainers train trainers in local partner organizations. These trainers, in turn, embark on training of entrepreneurs’ activities.

The institutional approach of the SIYB programme was also chosen to sustain the training activities over time. In that approach, local BDS organizations become the key actor to effectively and independently implement training once ILO technical assistance has phased out.
Training interventions

The SIYB programme comes with a range of training interventions customized to the needs and wants of both the trainers and master trainers in local BDS organizations, and the small-scale entrepreneurs on the ground.

Training of trainers

To develop and/or strengthen the training capacity of local partner organizations, the SIYB programme has developed the training of trainers programme.

To qualify for the SIYB training of trainers’ programme, candidates should
- have a good educational background
- have had previous training in adult education
- have business knowledge or experience
- have experience in training small-scale entrepreneurs
- be able to communicate well in the language/s of training.

Candidates that have been selected for training will be invited for a two-week training of trainers’ seminar conducted by an ILO-certified SIYB master trainer (the actual length of the seminar might vary depending on the needs of the trainees; sometimes, the seminar is preceded by an one-week refresher course in the basic concepts for business management).

The objective of the training of trainers’ seminar is to enable the participants to effectively and independently conduct SIYB training interventions and related follow-up activities. By the end of the seminar, participants are supposed to be able to
- market SIYB training
- select the customers that can benefit most from SIYB training
- carry out a training needs analysis about the selected trainees
- group them according to their training needs and learning abilities and design an appropriate training intervention
- conduct GYB, SYB and IYB training interventions
- monitor and evaluate the output and impact of training
- carry out follow-up training and counselling activities
- network with other Business Development Services organizations.

After graduation from the seminar, each future SIYB trainer is expected to design and implement at least one GYB, SYB and IYB training interventions each. They are assessed in the process by an SIYB master trainer. Upon satisfactory completion of the training intervention, they receive their trainer certificate.
Training of master trainers

SIYB master trainers are the heart piece of the SIYB programme. They are in charge of maintaining the pool of SIYB trainers and to provide local BDS organizations with access to the SIYB programme, if requested.

Only certified SIYB trainers can become SIYB master trainers. To qualify for the SIYB master trainer programme they must have excelled in performance and demonstrated outstanding committed for collaboration with the ILO.

Candidates that satisfy these selection criteria are invited to participate in a two-week training of master trainers’ seminar (the actual length of the training intervention might vary, depending on the needs of the trainees). The objective of the training of master trainers’ seminar is to enable selected individuals to effectively and independently implement the SIYB training of trainers' programme (see above).

During the seminar, the future SIYB master trainers are trained to:
- select potential SIYB trainers and carry out an analysis of their training needs
- conduct SIYB training of trainers interventions
- supervise and monitor the training delivered by SIYB trainers and provide them with appropriate support to deliver quality SIYB training
- promote and introduce the SIYB Programme to potential partner organizations and
- identify regional and national needs for further adaptation and enrichment of the SIYB programme components
- counsel local partner organizations on training programme management.

To graduate from the seminar, the participants must demonstrate intimate knowledge of the SIYB programme, excellent business management skills, excellent knowledge about adult training techniques and tools, leadership skills, interpersonal skills and an outstanding commitment to the SIYB programme.

After the seminar, and prior to final certification as master trainer, each participant must demonstrate their ability to independently and effectively implement the SIYB programme by organizing at least one training of trainers seminar. Provided satisfactory performance, they receive their ILO certificate.

Training of entrepreneurs

The SYB and IYB training interventions for entrepreneurs comprise
- Business idea generation training
- Business start-up training and follow-up activities
- Business management training and follow-up activities.
Business idea generation training targets potential entrepreneurs that are eager to start their own business operations but lack a feasible business idea. The training intervention is designed to assist these potential entrepreneurs to find out if they are the right persons to start a business, to identify feasible business ideas and to choose the one business idea that matches best their personal entrepreneurial characteristics and their local environment.

Business start-up training targets potential entrepreneurs that want to start their own business and already have a feasible business idea. SYB training is designed to assist these potential entrepreneurs to develop step-by-step their own business plan.

Business improvement training targets entrepreneurs that have been operating a small business venture for at least 12 months. IYB training enables these entrepreneurs to apply basic concepts of business management in their own businesses, namely to
- develop and implement a marketing plan
- cost their products and services
- control stocks
- project the sales and costs and the cash flow over the coming months
- manage buying of inputs and
- set up a record keeping system.

Training materials

The SIYB programme offers a range of training materials for both trainers and entrepreneurs.

Training materials for trainers

Each SIYB trainer is issued with an SIYB Trainers’ Guide. The Trainers’ Guide specifies in detail how to organize and conduct GYB, SYB and IYB training interventions and related follow-up activities.

Furthermore, SIYB trainers are issued with other supportive materials like the Business Counselling Guide and the SIYB handbook of adult learning techniques and tools.

Training materials for master trainers

Each certified SIYB master trainer receives a personal copy of the SIYB Master Trainers’ Guide. The SIYB Master Trainers’ Guide specifies how to set up and run a training of trainers programme.
Furthermore, each SIYB master trainer is issued with a range of supportive materials, i.e. a promotion kit, handouts and background reading material.

**Training materials for entrepreneurs**

The training materials for entrepreneurs consist of

- the GYB manual
- the SYB material kit
- the IYB material kit
- the SIYB Business Game.

The GYB manual is used during the business idea generation training intervention. The manual emphasizes practical ways to carry out different business idea generation techniques and assists the readers to identify the business idea most suitable for their purposes.

Step-by-step explanations are given in easy-to-understand language and illustrations are used to explain concepts and solutions as clearly as possible. Relevant examples and exercises are important features in the manual, enabling the reader to immediately practice various business idea generation and selection techniques.

The SYB material kit consists of an SYB Manual and two SYB Business Plan booklets. The SYB Manual guides the potential entrepreneur in a step-by-step approach how to prepare and complete a business plan. Practical examples of business start-ups, exercises and activities accompany each step.

The SYB Business Plan booklet provides the potential entrepreneurs with the necessary forms to complete a bankable business plan. The potential entrepreneurs complete a draft version of the Business Plan during SYB training. The second and final copy is filled in after the SYB refresher training intervention.

The IYB material kit consists of a set of six manuals, each dealing with one particular element of a basic business management system, namely

- Marketing
- Costing
- Stock Control
- Buying
- Business Planning
- Record keeping.

The topics are explained by combining simple step-by-step explanations with many illustrations that depict the practical, real-life situations typical of small businesses. Practical examples and exercises are important features of the manuals.
The ‘SIYB Business Game is an experimental learning/training tool used in both SYB and SIYB training. It gives the participants an opportunity to experience the effects of their business decisions in a simulated business environment. In SIYB training, it provides the entrepreneurs with an opportunity to apply the knowledge gained during the training.

Marketing support

ILO has developed a variety of complementary tools to support local partner organizations on the ground to successfully position the SIYB programme in the local market for Business Development Services, and to link up with clients that can benefit most from SIYB training.

The main tools are the SIYB
- Promotion kit
- Programme marketing workshops.

Promotion Kit

The SIYB promotion kit consists of a range of materials meant to assist the partner organizations in the field to market the programme effectively and independently. The kit contains, among others, posters and brochures, sometimes also promotion videos, newsletters and bulletins.

The precise range of promotional tools used in a given project will largely depend on the needs and wants of the local counterparts. Emphasis is always laid on cost-effective promotional tools that can be easily replicated by local partner organization once project support has phased out. For more details on SIYB promotional tools refer to page 22 of this Trainers’ Guide.

Programme marketing workshops

The programme marketing workshops aim at enabling training coordinators within local partner organizations to design and implement a marketing plan for their own SIYB programme.

During the workshop, the training coordinators are trained how to
- set a strategic goal for SIYB training in their organizations
- identify market opportunities and prospective market segments for SIYB training
- develop and implement a marketing strategy
- how to control progress in the implementation of their marketing effort.

After the workshop, and on request, the training coordinators receive on-the-job-counselling to implement their marketing plans.
2. THE SIYB TRAINING CYCLE

What is a training cycle

A training cycle describes the various steps involved in the design and implementation of a training intervention. It is called a cycle because ideally the final results of one training intervention are fed back into the planning stage for the next training intervention. Thus, the quality of the training interventions will improve over time and with each new training cycle.

The steps of the SIYB training cycle

The SIYB training cycle describes the various steps to be followed when designing and implementing an SIYB training intervention for small-scale entrepreneurs. The steps of the SIYB training cycle are illustrated below.

The SIYB training cycle

In the following chapters, you will be taken through the various steps of the training cycle.
3. MARKETING

The first step of the SIYB training cycle is to market the planned SIYB training interventions to your customers.

What is marketing

Marketing is everything you do to link up with your customers in the market and to supply them with goods or services that they need and want. Marketing puts the customer in the center of your attention. For example, as a BDS organizations providing SIYB training, marketing is everything you do to link up with your customers in the market and to supply them with needs-based SIYB training at competitive rates.

Why marketing is important

Marketing is important for many reasons. Systematically done, it enables you to
- identify a market opportunity that matches best with the competitive edge and the mission mandate and objective of your own organization
- choose the market segment of customers that can benefit most from your product and services and is thus likely to be in high demand for it
- make best use of your resources in your various marketing activities to reach out for your customers
- document and prove the success of your marketing effort, and to use the information to make your next marketing initiative even more effective.

How to structure your marketing effort

To assist local BDS organizations to systematically plan and manage their SIYB marketing effort, the SIYB project conducts so-called SIYB programme marketing workshops. These workshops take about three days and are directed towards training managers in partner organizations. The objective of these workshops is to enable the training managers to prepare a marketing plan for the SIYB “training product”, and to manage its implementation later on.

1 For more information on these workshops, contact your nearest SIYB master trainer or the SIYB project office.
As an SIYB trainer working in the field, you might not be directly involved in the development of the overall marketing strategy of your organization. Therefore, these marketing workshops might not be immediately relevant for you.

However, you are very likely to be directly in charge of marketing, planning and conducting single training interventions on the ground. For example, if you work as a training officer in a district office, you usually act with a certain degree of autonomy: While you receive the policy guidelines from head office, you are often left to translate them into action and to actually reach the customers.

Therefore, it is important that you know how to structure your marketing activities on the ground, to give them the right punch and to ultimately satisfy your customers.

To structure your marketing activities, group them into the following four categories (or P's of marketing) and then analyze each category separately:

1. **Product**: Activities meant to customize the SIYB training product to the needs and wants of your customers
2. **Price**: Activities meant to set the price right for SIYB training
3. **Place**: Activities meant to decide on the distribution mode and place for training
4. **Promotion**: Activities meant to inform the customers about the SIYB training product and to attract them to buy it.

### 1. Customize the SIYB training product

The product variable refers to activities that you conduct to adapt the training interventions to the needs and wants of a particular clientele.

In order to find out the needs and wants of your customers, conduct market research. Market data about the characteristics of your chosen customer segment is often readily available from publications, magazines and newspapers. You are also encouraged to refer to the results of the market research studies conducted by the SIYB project about the local market for training.

Sometimes, the market information you find readily available might not be sufficient or is outdated. In such a case, you have to collect the data about your customers yourself. The techniques and tools for market research are described in the IYB Manual on Marketing.

Process the market information about your customers to develop a detailed profile of their characteristics, specifying i.e. income levels, age groups, gender, physical location of their homesteads, education, felt needs, and any other information you deem relevant.
Based on these profiles, analyze the likely training needs and wants of your customers and tailor-make the training intervention accordingly. If you find that the profile will not give you a clear idea of what your clients want and need, focus on the information that gives you an indication of the likely preferences of your customers. For example, if you find that your customers have had access to higher education, you can deduct that they are likely able to comprehend the training topics fast and that they are not in need of extra-time for training.

Three ways are suggested to customize SIYB training: You can
- adapt the training materials
- flexibilize the time-schedule of training interventions
- adapt and complement training sessions.

**Adapt the training materials**

The ILO has come a long way in assisting you to offer a truly needs-based training package. The design platform of the IYB and SYB training package is based on a thorough needs-analysis of the target group spectrum. However, the SIYB training package is standardized. This is necessary to ensure its relevance to a wide target group spectrum in developing countries all over the world.

Therefore, the ILO explicitly welcomes the adaptation of the training package to the particular needs and wants of your market segment, but it insists on proper procedures to maintain the quality of the training materials.²

It usually requires a concerted effort between you the SIYB trainer, the management of your organization and the ILO to adapt the SIYB training materials according to the specific needs of your target segment while maintaining the quality standards of the package. The procedure takes time and comes at a cost but it can result in tailor-made training materials that are unique to your organization and distinguishes its services from competitors.

**Flexibilize the timetable of training interventions**

As a rule of thumb, SIYB training interventions can be delivered in a highly flexible manner. For example, a standard SYB training intervention would be delivered as a five-day seminar. However, due to the modular structure of SYB training, you can easily separate the modules and deliver them over an extended period of time, i.e. on weekends only, on one evening a week, or any other suitable time period.

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² The ILO has developed guidelines for training materials adaptation to facilitate the adaptation process. Please contact the ILO directly for more information on these guidelines.
You will find a list of the training modules, and the sessions grouped under each module, in the Annex of this Trainers’ Guide. The modules are listed in chronological order, with specification about the estimated time needed to facilitate a given topic. You will also find standard timetables of GYB, SYB and IYB seminars in the Annex of this Trainers’ Guide. Use both the timetables and the list of modules as a source of reference when setting out to flexibilize the training schedules.

When you use the list to plan your time-table, never change the chronological order of the modules! The order of the modules follows the structure of the training manuals. If you break up the order of the modules you are likely to confuse your clients during training and to limit the training impact.

Adapting one or several training session to the needs and wants of your chosen market segment is another feasible and effective way for you to customize SIYB training. You find the standard session plans for GYB, SYB and IYB training interventions in the Annex of this report. These standard session plans are your guideline when planning for a particular training session, but they can be easily complemented. You are actually **encouraged to adapt the standard sessions plans** to make them fully relevant for your customers.

Some suggestions for adapting the standard training sessions are to:
- introduce additional games
- complement the information in the training manuals with information about the actual environment relevant for the trainees (i.e. local rules and regulations, market intelligence and others)
- plan for short excursions or on-site visits.

When you adapt or complement a training session, keep the session objective in mind, though, and the overall timing of the training interventions. It is not a good idea to overload sessions and to compromise on time management for the sake of squeezing in more information. Also, you might get distracted from the main learning points of the session.

2. **Set the price right for SIYB training**

The price variable relates to activities associated with determining a price for SIYB training. You should always determine the “real” price for training, whether your organization has set tariffs for training, or not. If your own calculations show that your organization has vast room for improving its current cost recovery rate for training you should approach your supervisor to discuss the subject.
The set the price right for an SIYB training intervention you have to follow three steps:

- Calculate the total costs of the training intervention
- Find out the price your clients (and the training sponsors) are willing to pay
- Find out the price charged by your competitors for training.

**Calculate the total costs of the training intervention**

To calculate the total costs of an SIYB training intervention, you have to factor in all costs you incur when setting up and running a training course and related follow-up activities. These costs include:

- salaries for trainers
- training materials
- costs related to the training facility (e.g. hire charge for the room, OHP, electricity)
- food (and accommodation) for participants
- stationery, e.g. pencils, pens, flip chart paper, notepads, copies and others
- communication, e.g. telephone, fax
- contingency costs or provisions for unexpected expenses (e.g. for emergency transport)
- overhead costs which are a small portion of total operational costs of your organization. Through charging for overheads, you aim to recover a fraction of these costs through each and every training activity. Operational costs are incurred, among others, for:
  - office rent
  - energy
  - communication
  - insurance
  - promoting training (!).

**Find out the price your clients (and the sponsors) are willing to pay**

The price your clients are able to pay for SIYB training depends to a large extent on their income situation and savings. The market segment profile will provide you with the baseline information about the income of your clients.

Sometimes, you will find that your clients might only be able to meet a small fraction of the training costs, because they are poor or under-privileged. In many other cases, your clients will be able to pay at least part or even all training costs.

In the first case, your marketing activities to position the SIYB training product will have to carry a split focus. The first focus is on linking up with the training beneficiaries on the ground while the second focus is on the acquisition of training subsidies from a sponsor, e.g. an organization that can be committed to meet the balance between participant fees and total training costs.
In the second case, your marketing activities should have a prime focus on convincing the customer that it is worth paying the full costs of training. In many cases, these customers are able but not willing to pay for training because they do not appreciate the real value of training or they are used to receive training for free or at highly subsidized rates.

To convince these customers to pay, you will have to deliver quality training (substance) and market the quality training product in a professional manner (spin). The SIYB programme offers you a whole range of tools to attract customers to buy training from you. Again you might have to source additional funding from a training sponsor to meet the balance for the full costs of training, but you are well advised to minimize the element of subsidy in your calculations. Subsidies make you dependent on the training sponsor, and financially vulnerable against sudden changes in the policies of these sponsors. Furthermore, training subsidies tend to change the marketing focus of SIYB training providers away from the customers and towards the training sponsor. Training sponsors are meant to support the market exchange for training, and not to become the prime subject of interest of the training supplier.

Find out the price charged by your competitors for training

To find out how much your competitors charge for training interventions that are similar to the SIYB programme, you will have to collect information from your local market. For that purpose, you might study the official price lists of your competitors or inquire informally through your network in the development support community. It is very important to have a idea about the price structure of your competitors. Knowing these prices can give you a strategic advantage during the bidding process for a training tender.

3. Decide on the distribution mode and place for SIYB training

The place and distribution variable relates to what you do to make the SIYB training package available in the quantities desired and at the places preferred by you clients, while keeping the distribution costs down. The variable has two dimensions: You have to
- define the broader distribution mode for the SIYB training
- choose a particular venue for training.

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3 The IYB Basics Manual about Marketing describes in detail the different distribution channels for all types of businesses.
Define the broader distribution mode for training

When deciding about the distribution mechanism for SIYB training, your first and prime consideration has to be to maintain close direct contact with your clients – at least if you are using traditional facilitation methods and do not rely on distance learning or internet-based training yet. The larger part of your potential clients will not have the mobility and flexibility (and the resources) to easily come to your place for technical assistance. Therefore, it will usually be your task to go into the field to deliver your training services; sometimes, you might meet halfway, i.e. in a training centre.

The fact that, in most cases, you have to go to your clients to deliver your training services has clear cost implications. If you do not restrict yourself to your immediate local environment but want to focus on customers in different locations you have to allocate time and money for travelling, food and accommodation. Also, you have to consider your opportunity costs: you are far away from your own office and can not attend to other duties.

The main challenge, therefore, will be to organize your distribution system in a way that allows you to save on costs while, at the same time, to maximize your physical outreach.

To match both goals, cost effectiveness and direct customer contact, you as an SIYB trainer might consider seeking logistical synergy effects with SIYB trainers from other organizations, and to jointly conduct training and follow-up activities. Consider the other SIYB trainers not only as competitors but as a potential resource to tap for the benefit of all parties.

For example, you might opt to co-train with an SIYB trainer from another organization that is physically located close to your own customers. Your co-trainer will then be in a position to easily conduct individual follow-up for your clients after training.

Choose a particular venue for training

The choice of a particular place for training is largely determined by the distribution mode for training chosen by your organization (see above). For example, if your organization operates its own training venue you are likely to be bound to use these facilities.

However, within the limits set by the training distribution network, the choice of venue also depends on two other factors, namely the functionality of the place for training, and its convenience for the trainees.
To determine the functionality of a given venue for training, and its comfort for your clients, use the checklist of criteria on page 38 of this Trainers’ Guide.

Try to satisfy as many needs and wants of your customers, while balancing them with your requirement for training functionality and the overall quest to keep costs under control.

4. Promote SIYB training to your customers

The promotion variable relates to everything you do to inform your customers about SIYB training, and to attract them to buy training services from you. The major focus of promotion is on effective communication between you and your customers.

Four conditions determine effective communication. For you to effectively communicate with your customers, you must
- be sure that they take an interest in your message
- find the right communication channel to catch their attention
- identify their preferred communication code
- Choose their commonly used communication tools.

Ensure that the customer takes an interest in your message

The interest of adults, and institutions for that matter, to communicate is usually determined by an utilitarian impulse. Both are likely to listen if they can expect to benefit from the message.

To ensure that your customers take an interest in your promotional message, take the utmost effort to select market segments that can benefit from SIYB training and, therefore, have a latent demand for training.

Find the right communication channels to catch the attention of your customers

An essential condition to successfully bring your message across to your customers is to know how to catch their attention and imagination. As far as SIYB training is concerned, you will mainly work with small-scale entrepreneurs. Typically, these small-scale entrepreneurs are unlikely to have broad access to costly (tele-)communication facilities; overall in rural areas, radio and newspaper might be the only communication means accessible to the people. Furthermore, small-scale entrepreneurs usually interact and communicate in the place where they live and work.
Therefore, if you want to catch the attention of small small-scale entrepreneurs you should either aim at reaching them through a mass medium that is easily accessible for everybody or you should opt for direct interaction, i.e. during promotional workshops or on-site visits.

**Identify the preferred communication code of your customers**

The communication code is the language that you use to formulate your message. When you communicate with small-scale entrepreneurs, your message has to be short, clear and straightforward, emphasizing on what your customers interests most: How they can benefit from training.

**Choose the communication tools commonly known by your customers**

The communication tools are the vehicles to transport the message from the sender to the receiver. When you want to promote SIYB training to small-scale entrepreneurs, wrap your message in small digestible information bits and use simple yet comprehensive media to convey it, i.e. a poster or a short brochure. Don’t fall victim to the temptation of using over-sophisticated communication tools to get your message across. The audience might only remember your computer-animated pictures but not their message.

To assist you in the process of communicating with your clients, the SIYB project office offers you a wide range of customized communication tools and opens various communication channels, on request.

You can choose from the following communication tools:
- GYB, SYB and IYB promotional flyers targeting small entrepreneurs
- GYB, SYB and IYB posters targeting small-scale entrepreneurs
- SIYB presentation package with colour transparencies targeting entrepreneurs, training sponsors and other organizations.

The SIYB project office, on request, opens the following communication channels:
- Promotional workshops. Promotional workshops are major events jointly organized by the SIYB project office and local partner organizations. They are meant to promote the services of these organizations to the local small enterprise support community.
- Information stands at fairs and exhibitions. The SIYB project office sets up information stands at fairs and exhibitions to promote the programme, again together with local partner organizations.

Looking at the range of promotional tools and activities available, you might be tempted to plan for a whole bonfire of marketing events. Be careful, promotion
comes at a cost. You will have to calculate your inputs for promotion carefully and recover them at a later stage through your training budget.

How to promote SIYB training to a sponsor

Sometimes, you will have to promote a planned SIYB training intervention not only to your customers but also to a potential sponsor, for the latter to meet the balance between participant fees and total costs of training.

Training sponsors, be it donor agencies, government agencies, corporate business or individuals, have different needs and wants than your customers and you have to address these specific needs and wants to attract their attention. You also have to choose the appropriate communication channels, codes and tools to communicate with them effectively.

For a start, only contact sponsors that are likely to have a (latent) interest to subsidize training. The motivations for sponsors to subsidize training vary largely, from philanthropic and development-oriented to mere business interests. For example, while a donor agency might subsidize training to further the socio-economic development of your customers, a corporate sponsor might opt to sponsor training to improve its backward and forward linkages with small-scale suppliers, or to offer redundant labour an option for gainful self-employment after retrenchment. Carefully study the motivation level of the various sponsors, and only approach them when you feel that their interest might match the benefit of your clients, and vice versa.

To find the appropriate communication channels to get the attention of a training sponsor, keep in mind that they usually have access to computer e-mail, telephone, fax and mail. Training sponsors interact during meetings, workshops, and conferences. If you want to communicate with training sponsors, call them, send them a written message and/or seek to personally contact one of their officers. The focus of your efforts will always be on bi-lateral negotiations.

To identify the right communication code, keep in mind that training sponsors want detailed background information about SIYB training. They will expect you to cluster that information according to certain concepts widely debated in their community. If you want to talk with potential sponsors about the SIYB training package, and convince them to subsidize training, you will have to know a number of these concepts and use the relevant terminology. Some of the key questions likely to be asked by donors are:

- **Sustainability**: How does your organization plan to maintain the training programme once sponsor support has phased out? Will the training beneficiary contribute to the costs of training?
- **Cost-efficiency**: Is SIYB training cost-efficient compared to other programme (e.g. costs per participant, costs per job created)?
- **Training impact**: Does SIYB training have a significant impact? Is the impact documented?
- Poverty alleviation: Does your training programme contribute to the alleviation of poverty?
- **Gender sensitivity**: Does the training programme balance the specific needs of both sexes?
- **Environment and development**: Does the training programme emphasize the aspect of conservation of the environment and on sustainable economic development?
- **Project vs. Programme**: Is your proposed training intervention a stand-alone activity or is it part of a more comprehensive programme? Does it come in a package with other components like technical skill training and access to finance?

To choose the appropriate communication tool, remember that training sponsors often make use of, and expect others to make use of, communication tools of a certain professional standard, i.e. colour transparencies, multi-media presentations and others. To have an impact on your audience, you will have to adapt to these standards.
4. SELECTION OF SIYB TRAINEES

The second step of the SIYB training cycle focuses on the selection of participants for the various SIYB training interventions.

What is selection

The term selection refers to the process of identifying an individual, or an object for that matter, that is deemed suitable for a particular purpose. For example, in the training cycle of the SIYB programme, the term selection refers to the identification of potential and existing small-scale entrepreneurs who can benefit from SIYB training, and, where applicable, have the resources to pay either part or the full costs of training.

Why selection is important

Selection of SIYB trainees is important for many reasons. It ensures that
- You, the SIYB trainer, find the people who can benefit most from SIYB training
- The selected customers know that they can expect value for their money.

Therefore, proper selection is a win-win game for both sides.

SIYB selection criteria

As outlined in Chapter One of this Trainers' Guide, the SIYB programme has been developed particularly for individuals who want to start small-scale businesses or expand existing ones. To that extent, any potential or existing small-scale entrepreneur is a potentially eligible for training.

One cut-off selection criteria on the lower end of the eligible client spectrum applies, though: Potential and existing entrepreneurs applying for any type of SIYB training intervention should be able to read and write in the language of training and to make basic calculations. Otherwise, they are not thought to be able to fully benefit from a material-based training programme.

Apart from the general requirement for small-scale entrepreneurs to be literate, the following module-specific selection criteria apply:
- GYB training is open to any potential small-scale entrepreneur still looking for a feasible business idea. If the applicants already have a concrete and
feasible business idea, they should not be selected for GYB training but directly referred to an SYB training intervention.

- To be selected for SYB training, applicants should provide satisfactory proof that they have a concrete business idea. Furthermore, they will have to prove that they either have the technical skills, or have access to the technical skills required to start the planned type of business.
- To be selected for IYB training, applicants ideally should have operated their own business for at least six months, or better one year and beyond. They should have experienced the day-to-day business operations over an extended period of time to be in a better position to pinpoint their training needs and wants.

In practice, you will often find it difficult to apply rigid selection criteria for your trainees. For example, if you are working for a commercial training provider you will think twice before turning away a paying customer. Also, if you are working for a membership-based Non-Governmental organization you can hardly bar a member from access to SIYB training.

And yet, do not flout the selection criteria for SIYB trainees because:
- if you select semi-literate or illiterate small-scale entrepreneurs for training, they won’t be able to make use of the training materials and soon will feel lost during the training sessions
- if you mix potential entrepreneurs without a feasible business ideas with potential entrepreneurs having a clear idea about their future business, or if you mix potential and existing small-scale entrepreneurs, the ensuing conflict of interests between the trainees is likely to result in your clients walking out frustrated.

In both cases, the impact of your training effort is severely limited. You are not able to satisfy the needs and wants of your clients and your performance record as a trainer suffers. In turn, if you stick to the SIYB selection criteria, the foundation for high training impact is firmly laid.

**SIYB Selection process**

The selection process recommended for SIYB trainees entails two steps:
- Selection interview
- Desk selection.

**Selection interview**

In the first step of the selection process, small-scale entrepreneurs in need and want for training come to you for a brief interview. Alternatively, you can also go to the field and conduct the interviews on-site.
The interview takes about 10-15 minutes and is based on the questions of the SIYB Entry Form. For more information about the SIYB Entry Form refer below to selection tools.

The objective of the interview is to furnish you with the information necessary to evaluate whether the applicant
- satisfies the basic entry criteria for SIYB training
- has a feasible business idea, or
- is already running a business, and if so
- has active command of basic concepts of business management.

During the selection interview, your concern will also be to collect and verify the information in the application forms for each candidate separately. For that purpose, you have to follow-up on some of questions in the application form, i.e. inquiring about where and how an applicant acquired the skills necessary to run the planned business. You should particularly aim at finding out whether the business idea of prospective entrepreneurs is well thought through and feasible. If you are not sure whether an applicant has a concrete business idea or not, keep on inquiring until you have sought clarification.

On occasion of the selection interview you might also want to collect information about the training needs and wants of your future training intervention participants. The next chapter in this Trainers’ Guide explains how to conduct such a training needs analysis.

Desk selection

The second step of the selection process is to pick the candidates that can benefit from SIYB training.

Based on the results of the selection interview, you should be in a position to decide whether or not an applicant is selected for training and which SIYB training intervention is most suitable for him or her. You also have the information now to further group the applicants according to other criteria like type of (planned) business activities.

When you group your clients, it is essential that you put together those entrepreneurs who can benefit collectively from the training intervention. Hence, group the selected entrepreneurs according to the:
- Type of (planned) business activity e.g retailers, wholesalers, manufacturers, service operators
- The age-group e.g under 26, 26-35, 36-45, 46 plus.
- Size of business e.g self only, 2-5 workers, 6-10 workers, etc. (IYB only)
- The length of time in business e.g 1-2 years, 3-5 years, 6 years or more (IYB only).

A training intervention can be more effective if those to be trained have a similar background and have similar problems. Entrepreneurs running different types of businesses have different training needs. Similarly, the learning abilities of people from different age groups and people with different educational backgrounds vary. If entrepreneurs with different background, from different age groups, with different level of education etc. are brought together in one group the high level of participation necessary for effective transfer of knowledge and skills may be more difficult to achieve.

You may find it difficult at times to identify entrepreneurs with similar background in the numbers required for a planned training intervention. In such a situation, you could mix them in one of the following combinations:
- retailers and wholesalers
- manufacturers and service operators.

**SIYB Selection tools**

The main tool used to select candidates for SIYB training interventions is the SIYB Entry Form. A blank SIYB Entry Form is attached to this Trainers’ Guide.

The purpose of the SIYB Entry Form is to collect and record a core set of information about each applicant for SIYB training. The use of the SIYB Entry Form was explained above in the sub-chapter on the selection process.

As discussed earlier, you must complete a separate SIYB Entry Form for each applicant and store it carefully away after having analyzed the results to group and select the participants for the SIYB training interventions. You will need the information on the SIYB Entry Form again at a later stage to
- tabulate some basic statistics about your trainees in the SIYB Activity Report
- evaluate the impact of your training intervention some time after training, by comparing the information on the SIYB Entry Card with the data collected on the SIYB Performance Cards (refer to the chapter on Monitoring and Evaluation for further details).

You will soon find out that the SIYB Entry Form saves you a lot of effort and time when reporting your training activities to your organization and when measuring the results of your training efforts at the end of the training cycle.
5. TRAINING NEEDS ANALYSIS

At the third step of the SIYB training cycle, you are expected to conduct a so-called Training Needs Analysis of each applicant selected for SIYB training.

What is a Training Needs Analysis

A Training Needs Analysis refers to the process of assessing further what exactly the training needs and wants of the group of customers are that you have selected for training.

Why a Training Needs Analysis is important

A Training Needs Analysis is important for many reasons. It enables you to

- know the expectations of the SIYB trainees and to customize your training approach and curriculum accordingly
- identify the “learning gaps” of your clients and to design interventions that help to close them.

A Training Needs Analysis puts you in a position to satisfy your customers while, at the same time, to significantly increase the training impact; you are able to fine-tune your training effort and to lead your clients on a steeper learning path.

The SIYB Training Needs Analysis method

The SIYB Training Needs Analysis method is easy and quick to apply. Its aim is to identify both the training wants and the training needs of your clients and to customize SIYB training accordingly.

Identify the training wants of your clients

To identify the training wants (often also called “felt training needs”) of your clients, it is recommended that you prepare a brief list of questions and directly inquire with your clients during the selection interview. That approach saves you on money and time. A list of questions about the training wants of your clients is suggested below under Training Needs Analysis tools.

Identify the training needs of your clients

To identify the “real” training needs of your clients (as opposed to the “felt” needs, see above), focus your attention on their “learning gap". The learning gap
specifies the difference between what your clients should know and what they do know about basic business management.

What your clients should know about business management is described in the SIYB training materials. Small-scale entrepreneurs mastering the contents of the SIYB materials are expected to be in a position to start and improve their own businesses.

To assess what your clients do know about business management, refer back to the SIYB Entry Form. The SIYB Entry Form tells you whether your clients already have a feasible business or actually started their business, and if so, whether they have active command of basic business management concepts.

Take the data from the SIYB Entry Form and the results of your inquiry about the training wants of your clients to develop a short list with the key training needs and wants of each applicant.

Take this list and place it beside the draft of the customized training programme that you had developed earlier looking at the profile of your market segment of customers. Now is the time to fine-tune and finalize the structure and contents of that training intervention to even better reflect the needs and wants of each individual client.

There are many ways how to fine-tune the training programme based on the results of your Training Needs Analysis. For more detail, refer back to the subchapter on how to customize your training product on page 15 of this Trainers’ Guide.

**SIYB Training Needs Analysis tools**

The main tool recommended for the analysis of the wants of your clients is a short questionnaire. You complete the questionnaire during the selection interview with the client.

You can ask your client the following questions:

- Is there a particular training topic/business management subject that you are particularly interested in?
- Please prioritize the following list of training subjects: Which do you consider as most important, and why?
  - SYB: Contents of a Business Plan, Marketing, Costing, Staffing, Legal Requirements, Forms of Business, Financial Planning, Required Start Up Capital, Types and Sources of Start-up Capital
  - IYB: Business and Family, Marketing, Buying, Record keeping, Stock Control, Costing Business Planning
- Which of the above mentioned training subjects do you like least?
- Do you mind sharing your personal experience and, where applicable, business problems with other SIYB trainees?
- Is there any specific request you would have with regards to the training venue, the food served in the session breaks?

Feel free to complement the list of questions above, to better reflect the specific profile of your clients.

The main tool recommended for analyzing the real training needs of your SIYB trainees is the SIYB Entry Form. It furnishes you with some important information about the current knowledge level of your clients. Again, you are encouraged to expand, not to cut, on the number of questions in the Entry Form, but remember not to overload the interview and to make your clients feel cross-examined.
6. TRAINING

The fourth step of the SIYB training cycle refers to the preparation and actual implementation of the SIYB training intervention.

The SIYB training methodology

The SIYB training methodology is based on two fundamental principles: It
- follows a participatory approach
- is action-oriented

Participatory training

The SIYB training methodology follows a participatory approach. During the initial training interventions, and also later during the follow-up activities, your clients are considered main resource persons. They have built up a vast apparatus of personal experience, in the case of IYB trainees hands-on business experience that can be unlocked to cross-fertilize your expert input during the training sessions.

The first and principal rule of participatory training is not to lecture your SIYB trainees over an extended period of time during training. While lectures might be a very useful training method to focus the mind of your audience and drive a major learning point across, its extended use tends to create a class-room atmosphere where participants are reduced to the role of passive recipients.

Rather than lecturing your clients, use participatory training methods to encourage active input from your trainees and to provide them with a platform to exchange their own experiences. The following participatory training methods are recommended:
- brainstorming
- discussion
- exercises
- case studies
- role-plays.

Brainstorming

What it is:

Brainstorming is a method used to generate ideas. Its objective is to stimulate participants into finding different ways to address a given problem. You pose a problem or a question which can be tackled in a number of different ways and ask the participants to think of such different ways. For example, in teaching 'promotion' you can ask the participants to
brainstorm on ways to promote their products. The objective of brainstorming is to produce a list of alternative solutions/answers and then subsequently discuss the merits and demerits of each solution.

When to use it:
Brainstorming is ideally used to find a practical solution to a problem. In training, it is also used to help participants learn by building on their experiences. As a training method brainstorming is used when the participants have ideas about how the particular problem can be solved.

What it will achieve:
The participants learn by building on their own experiences. Furthermore, they learn to choose from alternative solutions.

Advantages:
Brainstorming produces a high degree of participation. It also makes the session more lively and it stimulates creative thinking.

Points to watch:
- During brainstorming, the focus should be on generating ideas and not on discussion of ideas.
- Focus your attention on getting as many ideas as possible.
- Make sure everyone participates by asking those who are quiet for ideas.
- No critical remarks should be allowed. Evaluation of ideas comes later.

Discussion

What it is:
Knowledge, ideas and opinions on a particular subject are freely exchanged among the participants and the trainer. In open discussion, the trainer facilitates and controls the discussion while everyone participates. In group-discussion, the participants are divided into small groups. The subject is freely discussed by each group. The trainer circulates among the groups as an observer and makes appropriate inputs wherever/whenever necessary. The groups are then brought together and the conclusion of each group is presented and discussed in an open forum.

When to use it:
Discussion is ideally used to analyze a given situation and reinforce the concepts and understanding of the participants through exchange of views with others. It is used when participants have background knowledge of the issue.
What it will achieve:
Discussion brings about changes in the attitudes of participants as they share experiences.

Advantages:
The discussions provide feedback to the trainer about the way in which the participants may apply the knowledge learned.

Disadvantages:
The participants may stray from the subject or fail to discuss it usefully.

Points to watch:
- The participants may become stubborn and determined to stick to their attitudes and/or opinions rather than be prepared to change them.
- You need to control the structure, direction and process of discussion to avoid these pitfalls.

Exercises

What it is:
Participants are asked to undertake a particular task which leads to results. An exercise is usually a practice or a test of knowledge learned prior to undertaking the exercise and may be done in small groups or individually. Since the level of absorption of knowledge varies from person to person, a group exercise helps to reinforce the knowledge through peer instructions. An individual exercise helps to practice of the knowledge learned.

When to use it:
An exercise is used after the participants have learned a specific piece of knowledge or after a topic has been covered.

What it will achieve:
An exercise is an active form of learning as the trainees practice the techniques taught to them and try to apply the knowledge learned to get solutions. Exercises also help the trainer to find out how much the trainees have absorbed.

Points to watch:
- Some trainees may be seen to struggle during the exercise. In such case, you need to provide them with appropriate hints, but not the solution.
**Case studies**

**What it is:**
A case study is a history event or a set of circumstances with appropriate details which the trainees need to examine and understand. The trainees are required to analyze and diagnose the causes of a particular problem (or problems) set out in the case study. They may further be required to solve the problem/s.

**When to use it:**
A case study is ideally used to demonstrate the application of various techniques in the real life situations which participants are likely to face.

**What it will achieve:**
A case study simulates situations which the trainees may face in their day-to-day business dealings. It therefore prepares trainees to face similar or related situations in real life.

**Advantages:**
The case study method helps the participants to look at a problem or set of circumstances free from the pressures of the actual problem/event. It provides opportunities for exchange of idea and generation of alternative solutions to problems which they will face in their businesses.

**Disadvantages:**
In real life, the situation/event will differ from those set out in case studies. The trainees may get the wrong impression of real life situations.

**Points to watch:**
You need to emphasize that decisions taken in the training situation may differ from those that have to be made on the spot in real life situations.

**Role plays**

**What it is:**
A role play is a dramatization of what may happen in real life situations. Participants are asked to enact specific roles in a given situation. The objective is to practice dealing with face-to-face situations in real business life. The dramatized event is then discussed by all participants in an open forum to bring out how the situations could be dealt with differently.

**What it will achieve:**
The participants practice near-to-life situations in a protected training environment and receive advice or constructive criticism and opinions from their colleagues. This helps participants to learn the finer points
through practice and to obtain guidelines on how to react appropriately in real life situations.

Advantages:
Role play helps to give the participants confidence in facing actual business situations.

Disadvantages:
In real life, the situations/events will differ from those set out in the role play. The trainees may get the wrong impression of the real life situations. They may fail to realize that decisions taken in the training situation are different from those that have to be made on the spot in a live situation.

Points to watch:
- Participants may be embarrassed and their confidence may diminish rather than being built up.
- Some participants may be carried away in enacting their roles making the whole role play look like a farce and something that may not be taken seriously.
- You need to moderate the role play to avoid this happening.

Always remember that a participatory training method does not relieve you of the task of being the ultimate source of expertise on the learning subject. Always be prepared that your clients ask you to clarify a particular point during a training session. Mentally project the likely course of events when preparing a participatory training session, anticipate these questions and prepare the right answers.

**Action learning**

The SIYB training methodology has a strong focus on action learning. During the SIYB training interventions, your clients are *learning by doing* with the help of exercises and games:

- Exercises. Through the exercises in the training manuals your clients are made to apply the syllabus of the training sessions to their own work environment, coming to understand along the way how to make best use of the various business idea generation techniques (GYB) and the various business planning and management tools. The results of these exercises are immediately useful to your clients because they provide the raw data for the emerging business idea, the draft business plan or the action plans.
- Games. By playing business games, your clients simulate the use of business planning and management tools, and the effect of their decisions made with the help of these tools on their business operations.\(^4\) Together, your clients will experience immediately the adverse or positive impact of their business

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\(^4\) That observation is not applicable for GYB training interventions
decisions. Based on the results of the role-play they are able to fine-tune their planned activities for later use.

At the end of the training intervention, your clients take an action plan back home, specifying in detail what they plan to undertake when to translate the theory of the training syllabus into action. In the SYB training intervention, your clients also prepare a draft business plan, aimed to assist them carrying the initial training impetus back home and to finalize the document with the guide of the action plan and the counseling support of the SIYB trainer (also refer to the next chapter on follow-up activities after training).

**Preparing SIYB training interventions**

Preparing SIYB training interventions can be a major logistical challenge. You have to prepare many things at the same time, and each of them is equally important for the success of the planned training intervention. Even experienced trainer find it useful, therefore, to make a checklist for their training preparations.

**A checklist for the training preparations**

Follow these steps when preparing an SIYB training intervention:

1. Select the training venue
2. Seek approval for the training intervention budget
3. Finalize the training timetable and design the session plans
4. Identify resource persons
5. Inform the participants
6. Organize training materials and equipment
7. Conduct a pre-training intervention meeting
8. Brief the external resource persons
9. Make last minute checks.

1. **Select the training venue**

The first step in the preparations for the SIYB training interventions is to select a training venue that conforms with the distribution mode for training chosen by your organization (refer back to the marketing chapter of this Trainers’ guide on page 20) Along with these priorities, your choice of the training venue should reflect two other concerns:

- The training venue should be functional for training
- The training venue should offer your clients comfort.

With regards to the functionality of the training venue, think about

- **Location:**
The venue should be convenient to the selected participants to ensure their full attendance and timely arrival on each day of the training intervention. Consider advantages of a resident training intervention versus a non-resident training intervention.

- **Size of the training room:**

  The venue needs adequate space for the group to function effectively. A room measuring at least 6 meters x 8 meters is recommended for 20 participants.

- **Layout of the training room:**

  Consider the training equipment and comfort of the participants. Effective training requires concentration. To facilitate this, it is recommended that the training room:
  - has good lighting
  - has good ventilation
  - has low noise levels
  - is free from external interruption while the training sessions are in progress.

If you are to use an overhead projector or TV/video equipment, make sure there are appropriate electrical plug points and test the equipment beforehand.

With regards to the comfort of your participants think about

- whether it is easy for them to travel to and from the venue
- generally: whether the facilities of the venue are likely to satisfy needs and wants of participants that are not training-related (i.e. entertainment)
- more in particular: Whether the venue offers accommodation in rooms that are suitable for individual learning after sessions

Other issues also related to the comfort of your SIYB trainees that you might want to consider are:

- Could trainees with young children be offered childcare facilities to ease pressure from domestic duties on them?
- Are there any facilities for physically disabled trainees?

It is advisable to seek confirmation about the training venue as early as possible, i.e. four weeks prior to the training event, because you need to communicate the details about the place to training intervention participants and resource persons in time.

2. Seek approval for the training budget
The next step in the preparations for the SIYB training intervention is to finalize the budget, and to seek its approval by your supervisor, where applicable. For more information about the components of the budget, refer back to the price variable on page 17 of this Trainers’ Guide.

3. Finalize the training timetable and design the session plans

By now you should also be able to draw the timetable of the training intervention and design the individual session plans. You customized the structure of the training intervention and the contents of each session module at an earlier stage before marketing the training intervention to your customers; you fine-tuned the training structure and session contents after having analyzed the results of the Training Needs Analysis in your hands.

The remaining task is to detail the timing for each session of the training intervention with date and hour, and to specify exactly
- which topic you will address in which session
- what session objective you plan to achieve
- what activities you are going to conduct during the session, in chronological order and roughly how many minutes you plan to spend on each activity
- which training method and training tools you intend to use
- which chapters and pages in the supporting training materials you intend to refer to during the session.

You will find examples for standard training intervention timetables and standard session plans in the Annex of this Trainers’ Guide. Remember: You are encouraged to adapt and complement these sessions, and to flexibilize the timetable of the training interventions, as long as you follow the basic guidelines described in the sub-chapter on customizing your training product on page 15 of this Trainers’ Guide.

Also keep in mind that SIYB training is material-based. Always use the materials during training, and link back to them during the each session to make sure you achieve maximum training impact.

4. Identify resource persons

You are likely to need two types of resource persons to assist you in the delivery of some of the topics, namely:
- Resource persons delivering the “core” SIYB training modules (for a list of these modules refer to the Annex of this Trainers’ Guide). Remember that the sessions grouped under these training modules should only be facilitated by trainers who have graduated from an SIYB training of trainers seminar.
• Resource persons to assist in the delivery of other specialized topics of particular interest, i.e. price control regulations, taxation, labour regulations and others. People in these categories may be successful businessmen or businesswomen, consultants or professionals from organizations involved in small enterprise development.

It is recommended that SIYB training interventions are always conducted by a team of two SIYB trainers. It is to the discretion of the lead trainer to decide whether or not external resource persons should be invited.

5. Inform the participants

It is important to remember that the SIYB trainees need to be informed well in advance (1-2 weeks) so that they can make suitable arrangements for the training intervention.

6. Organize training materials and equipment

Training materials may include:

• The GYB manual, the SYB manual and business plan booklet, the IYB manuals and the SIYB Business Game
• presentation transparencies
• handouts
• exercises
• stationery, for example writing pads, pencils or pens, erasers, pencil sharpeners, flat-files, paper puncher, etc.

In addition to the above, ensure that the following forms are available in the required quantity:
• Daily Reaction Evaluation forms
• End of Training Evaluation forms.

Training equipment may include:
• chalkboard and chalk, preferably in different colours
• flip chart stand, flip charts and markers in different colours
• pin-boards and pin-cards
• overhead projector
• “sticky stuff, adhesives or self-adhesive tape for displaying flip charts on the walls.

7. Conduct a pre-training intervention meeting

At least 1 week before the training intervention, convene a meeting with the other SIYB trainer taking part in the training intervention to discuss the training
intervention arrangements, including the allocation of topics and practical modalities.

Ensure that your co-trainer is fully briefed on:
- the profile of each SIYB trainee selected for the training intervention
- their business ideas
- the training intervention objectives
- the venue and timetable
- training materials and equipment.

It is important that during the pre-training intervention meeting you discuss with the co-trainer the actual training intervention content to be covered, training methods and visual aids. As principal trainer, ensure that your co-trainer prepares session plans, case studies, exercises and handouts and that he/she has the necessary training materials.

8. Brief the external resource persons

When you include non-SIYB topics in the training intervention you need to ensure that such topics and their delivery fit appropriately within the overall training programme and that they are linked to the other sessions. The resource persons invited to deliver such topics must be briefed sufficiently in advance about:
- the details of the planned SIYB training intervention
- the target group
- its level of understanding
- areas to cover.

You must also ensure that:
- you understand the objective of the topic to be presented by the resource person
- both you and each resource person agree on the general structure and content of the presentation
- their presentations are not too technical or complicated for participants to comprehend
- their presentations provide just the right quantity of information.

9. Make last minute checks

You may need to ensure that the participants are reminded of the training intervention dates once again closer to the actual dates and that they confirm attendance. Make sure that you check all other arrangements again just before the training intervention:
- communicate with the resource persons
- ensure availability of training materials and equipment
- check all arrangements at the venue
- check transport arrangements
ensure timely availability of finance.

Conducting SIYB training interventions

While GYB, SYB and IYB training interventions differ largely with regards to the topics addressed, some of the training sessions and some of the activities conducted during these sessions are the same throughout the SIYB programme, namely

- The opening session
- Daily evaluation and end-of-training intervention evaluation
- The closing session.

The opening session

During the opening session of each SIYB training intervention, your first task is to establish a friendly and relaxed atmosphere that is conducive to learning. Remember that the trainees are adults who find themselves in a strange environment and may therefore be apprehensive. They may not be sure if the time they spend in attending SIYB training will be time well spent. It is therefore of utmost importance right at the outset to create an atmosphere of confidence that the training intervention is in fact going to be of substantial help to them in generating their business ideas, or in starting and improving their business.

Welcome the participants and give them a brief explanation of how the training will be conducted. Explain that the training will focus on their specific problems and pledge together that you and your co-trainers will do your best to address their individual needs. Challenge the participants to learn and make best use of the opportunity and tell them what they are expected to do during the training sessions.

Introduce yourself and the co-trainers. Even though all of the participants have met you before, taking a lead introducing yourself and your co-trainers will create a friendly atmosphere.

Then, ask the participants to introduce themselves to the group and at the same time state how they expect to benefit from training. These introductions can be interesting in a variety of ways, e.g.:

- Entrepreneurs can be asked to sit in pairs and get to know each other. Each one then speaks to the audience for a few minutes to introduce his/her partner by telling the group what his/her background is, what business he or she has, his/her expectation about the training intervention, etc.
- Participants can stand in a circle. You, the trainer, have a ball, which you hold while introducing yourself. At the end of the introduction, you state what your expectations are about the training intervention. Reiterate that
everyone else after you should state his/her expectations about the training intervention. After that, you throw the ball to anyone in the circle. Whoever catches the ball is the next to introduce himself/herself.

Write the stated expectations on a flip chart during the introductions.

Next, review the participants’ expectations:

- State clearly whether the raised expectation is going to be dealt with or whether it is beyond the scope of the training intervention. Just promise what can be delivered and inform the participants about what is impossible to cover.
- Display the flip chart page on a wall where everyone can see it. Keep it there till the wrap-up session at the end of the training intervention to see which expectations have been met.

Next, explain the objectives of the training intervention and the timetable:

- Discuss the objectives of the training intervention
- Make sure that all the participants understand and agree with the objectives of the training intervention
- Give background information about the SIYB training programme, its objectives, components and methodology
- Explain the contents and time-table of the training programme
- Make sure that the timetable (including breaks) is correctly understood
- Stress the importance of being on time and attending all sessions
- Explain the official opening / closing ceremony.

**Daily evaluation and end-of-training intervention evaluation**

At the end of each day of the training intervention, ask the participants to make their own evaluation of the day’s proceedings, completing the Daily Training Evaluation Forms (also refer to the last step of the SIYB training cycle about Monitoring and Evaluation).

At the beginning of each following day, you should start by giving feedback on the evaluation of the previous day. Minor things like “there is no hot water” (if it is a residential training intervention), can be easily addressed and will stop further irritation that may affect the morale of the participants.

Always ensure that there are no administrative issues worrying participants so that their attention will not be distracted from learning.

At the end of the training intervention, ask the participants to make their own evaluation of the training intervention, completing the End of Training Evaluation Form. Analyze the comments made by every participant on his/her End of Training Evaluation Form with the help of the Training Evaluation score sheet.
The training evaluation forms and the training evaluation score sheets are attached to this Trainers’ Guide.

**The closing session**

The focus of the closing session is on
- summarizing the main learning points of the training intervention
- assessing whether the expectation of the trainees were met
- clarifying the logistics of the SIYB follow-up activities.

At the end of the closing session, you will hand out the SIYB training certificates to the participants.

Do not forget to finalize the SIYB Activity Report after the completion of the training intervention and to send a copy to the SIYB project office, to document and proof your training activities. Refer to the chapter on Monitoring and Evaluation in this Trainers’ Guide for more information on the SIYB Activity Report.
7. FOLLOW-UP

The fifth step of the SIYB training cycle relates to all activities conducted after training to maximize training impact and to achieve sustained customer satisfaction.

What is follow-up

In the context of the SIYB training cycle, the term follow-up refers to the process of supporting SIYB trainees to apply their new knowledge and skills in practice.

Why follow-up is important

Follow-up is important for two main reasons:
- to significantly increase the impact of training
- to sustain customer satisfaction after the actual training intervention.

Follow-up in the SIYB programme

The SIYB programme knows various follow-up methods and tools, depending on the type of training intervention conducted:

GYB follow-up

The objective of follow-up on the GYB training intervention is to assist GYB graduates to continue developing their business idea into a bankable business plan.

Due to the close structural link between the GYB component and the SYB component, the main GYB follow-up method is the SYB training intervention. An SYB training intervention is considered the logical next step for GYB graduates because its objective is to enable them to develop their feasible business idea into a bankable business idea, and to get their own enterprise started.

SYB follow-up

The objective of SYB follow-up is to actively support your clients to finalize their business plan and to submit them to a financing institution (where applicable).

The main SYB follow-up method is Individual Counseling. The technique of counseling is explained below under IYB follow-up.

After SYB training, you counsel each client in the process of
- collecting the data necessary to complete their business plan
- working the data into the draft business plan and to finalize the document.
Immediately after the SYB training intervention, the SYB trainees are sent to collect the information necessary to finalize their draft business plan. The recommended period for data collection is 4-6 weeks. However, this period may vary among organizations depending on availability of resources, etc.

During the data collection period, it is the responsibility of the SYB graduates to collect the data for their Business Plans largely independently. The action plan developed during the SYB training intervention is supposed to guide them in the process.

However, if the participants have difficulties it is essential that you can be contacted by the SYB graduate for counseling support, either personally in the office or over the phone. In both cases, it is necessary to agree with the participants on when and where you will be available for them. This should be discussed at the end of the SYB training intervention before the participants leave to collect their data.

Once the data collection is complete, SYB graduates proceed to work the information into their business plans and to finalize the document. Experience shows that this is a critical moment where many potential entrepreneurs despair and abort the project. It is at this stage where you, the SIYB trainer, are expected to provide vital Individual Counseling to assist him or her to complete the document and to submit it to a financing institution, where applicable.

During the Individual Counseling sessions, your main task is to evaluate the final draft of the business plan of the SYB graduate. You have to assess whether the assumptions made in the Business Plan are realistic and whether its components are consistent, and whether all calculations are correct.

Assess the Business Plan of your client component by component. Concentrate on the specific factors in each component and ask yourself the right questions to form an opinion regarding that part of the plan. The chart below will help you to concentrate on the right factors and ask the right questions. Use the chart like this:

- The first column refers to the various components of the Business Plan. Take the SYB graduate one-by-one through each component but do not hesitate to go back and re-evaluate an earlier part in case of renewed doubt.
- The second column refers to the key points to assess with regards to each component of the Business Plan. You are free to add to the list of key points.
- The last column suggests one or more questions to ask in order to draw the attention of your client to the key points in the respective chapter of the Business Plan.
<table>
<thead>
<tr>
<th>Business Plan component</th>
<th>Factors to assess</th>
<th>Questions to ask</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business idea</td>
<td>Assess the product or service and the suggested customers.</td>
<td>Are the suggested customers likely to buy the product or the service?</td>
</tr>
<tr>
<td>Marketing Plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product</td>
<td>Assess the product features and the suggested customers.</td>
<td>Are the product features likely to satisfy the needs of the customers?</td>
</tr>
<tr>
<td>Marketing plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Price</td>
<td>Assess the price</td>
<td>Is the price realistic in view of the cost, how much customers are willing to pay and competitors' prices?</td>
</tr>
<tr>
<td>Place</td>
<td>Assess the customers and the planned location of the business.</td>
<td>Is the planned location of the business likely to be the most convenient for the customers? This is primarily important for retailers.</td>
</tr>
<tr>
<td></td>
<td>Assess the suggested distribution channels and the customers.</td>
<td>Will the customers be able to buy the product or service in a convenient way with the suggested distribution channels?</td>
</tr>
<tr>
<td></td>
<td>If direct distribution is suggested, assess the resources of the business.</td>
<td>Will the business have enough resources, financial and staff, to efficiently sell directly to end customers?</td>
</tr>
<tr>
<td>Promotion</td>
<td>Assess the suggested methods of promotion and the customers.</td>
<td>Will the promotion activities reach the target customers? Are the promotion activities likely to appeal to the customers? Are promotion costs realistic considering the size of the planned business?</td>
</tr>
<tr>
<td>Form of business</td>
<td>Assess the suggested form of business and the reasons given for choosing this form.</td>
<td>Do the reasons for choosing this form of business make sense?</td>
</tr>
<tr>
<td>Staff</td>
<td>Assess the suggested staff and the tasks that will be performed in the business</td>
<td>Do the suggested staff have the right skills and experience to perform their tasks?</td>
</tr>
<tr>
<td></td>
<td>Assess the suggested staff and the size of operations.</td>
<td>Is the suggested number of staff enough to run the business?</td>
</tr>
<tr>
<td>Legal responsibilities</td>
<td>Assess the type of business operations and possible legal aspects that may apply.</td>
<td>Have all the important legal aspects been considered?</td>
</tr>
<tr>
<td>and insurance</td>
<td>Assess the type of business operations and possible types of insurance.</td>
<td>Have all necessary types of insurance been considered?</td>
</tr>
<tr>
<td>Costing</td>
<td>Assess the Product Costing Form, the Labour Costs Form and the Indirect Costs Form.</td>
<td>Are all the calculations correct? Are the direct material costs, direct labour costs and indirect costs realistic?</td>
</tr>
</tbody>
</table>
One word of caution: Sometimes, it takes highly specialized knowledge about a particular sub-sector, a geographic area, or a particular customer segment to authoritatively evaluate whether a business will succeed, or not. If you lack that expertise, consider referring your client to a colleague, or an organization, that has the required knowledge.
After one or several of these counseling sessions, your SYB graduates are expected to be in a position to finalize their Business Plans, to successfully submit them for funding and to start their business. Some SYB graduates are likely to keep on referring to you even after starting their businesses. Remember, each SYB graduate inquiring about a business related subject is a potential customer for IYB training. Refer these clients to the next IYB training intervention.

**IYB follow-up**

The IYB follow-up training methods are designed to reinforce the basic training delivered in the IYB training intervention and to help the small-scale entrepreneurs to adopt the necessary management skills. The follow-up methods recommended for IYB graduates focus on enabling entrepreneurs to diagnose their own problems and find workable solutions by applying the basic management principles taught in the IYB training intervention.

The three recommended methods of IYB Follow-up are:
- Refresher Training (RT)
- Business Improvement Groups (BIG)
- Individual Counseling (IC).

The characteristics of these three follow-up methods are described and compared in the table below:

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>RT</th>
<th>BIG</th>
<th>IC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training methodology/techniques</td>
<td>Classroom</td>
<td>Action learning in groups</td>
<td>Individual counselling</td>
</tr>
<tr>
<td>Training objectives and expected outcome of the intervention</td>
<td>Entrepreneurs learn the basic principles of business management, change attitudes and are motivated to learn more and improve business performance</td>
<td>Entrepreneurs change attitudes and behaviour, solve own problems, adopt skills through practical application of the acquired knowledge and improve business performances</td>
<td>Entrepreneurs are further tutored on-the-job, reinforce their management skills, learn to solve own problems and improve business performances substantially</td>
</tr>
<tr>
<td>Average numbers trained per Intervention</td>
<td>20</td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td>Training venue required</td>
<td>Sufficient training room</td>
<td>Small room—could be at business places of participants</td>
<td>Entrepreneur’s business place or the trainer’s office</td>
</tr>
<tr>
<td>Cost of intervention for every entrepreneur trained</td>
<td>Higher than for BIG</td>
<td>Low</td>
<td>Very high</td>
</tr>
<tr>
<td>Probable cost contribution by entrepreneurs</td>
<td>Part of the costs, mainly for IYB books</td>
<td>IYB recommendation: Full cost</td>
<td>IYB recommendation: Full cost</td>
</tr>
<tr>
<td>Level of competence required on the part of the trainer</td>
<td>Classroom training techniques and knowledge in IYB topics</td>
<td>Action learning facilitation techniques, problem solving ability and practical business knowledge</td>
<td>Individual Counseling techniques, problem solving ability and practical business knowledge</td>
</tr>
</tbody>
</table>
IYB refresher training

The objectives of IYB refresher training are to enable the entrepreneurs:
- to learn basic business management principles
- to apply the acquired knowledge in their business operations.

The IYB refresher training intervention is recommended for those entrepreneurs who:
- have previously attended a regular IYB training intervention
- are willing to receive further training
- are willing to pay for it
- are willing to prepare suitable action plans at the end of the training intervention and to implement them within the agreed period.

An IYB refresher training intervention focuses on teaching the entrepreneurs how to apply basic management principles to specific business situations through practicing. This method uses group work to enhance the learning process.

Participants are divided into small groups of 3-4 people for the duration of the training intervention. These groups work independently on specific case studies that closely represent actual and practical situations that confront them in their day-to-day activities. The groups then interact with each other to discuss how each group analyzed the case and arrived at their solution. The participants compare the different approaches and solutions and try to agree on one.

The trainer’s role during the group work session is that of a facilitator and a guide. You circulate amongst the groups to observe how each group is approaching the problem and to provide appropriate direction or assistance.

Group work sessions demand considerable preparation and concentration. A single trainer can effectively handle at the most three such groups in one training intervention session. It is recommended, therefore that you work with a co-trainer if more than 12 participants are included in an IYB refresher training intervention.

To find out which IYB topics to cover during IYB refresher training, refer back to the results of the SIYB Performance Card that you maintain about each client (the SIYB Performance Card is explained in the next chapter on Monitoring and Evaluation; a blank Performance Card is attached to this Trainers’ Guide). Comparing your clients’ SIYB Performance Card completed some time after IYB training with their SIYB Entry Forms completed before IYB training, you can find out whether your clients have improved their business management knowledge, and in which topics they need further training.

You can use the session plans for original IYB training interventions in the Annex of this Trainers’ Guide, but you need to include more group discussions. Give the small groups appropriate case studies or exercises to work on. Design your sessions to meet the specific needs of the group.
A sample session plan for a refresher training session about the four P’s of marketing is reproduced below:

**Materials:**
- Flip chart or chalk board
- IYB Marketing manual
- Old Newspapers and other pieces of paper
- Four pairs of scissors
- Manila paper
- Small cartons/cardboard boxes and tape

**Duration:** 2 hours & 30 minutes

**Objective:** To enable the participants to describe the four P’s of marketing.

<table>
<thead>
<tr>
<th>Time</th>
<th>Content</th>
<th>Method</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 mins</td>
<td>Objective</td>
<td>Lecture</td>
<td></td>
</tr>
<tr>
<td>30 mins</td>
<td>What is marketing?</td>
<td>Brainstorming/Open discussion</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. Ask the participants what marketing is.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Lead a discussion on the points raised.</td>
<td></td>
</tr>
<tr>
<td>30 mins</td>
<td>What are the 4 Ps in marketing</td>
<td>Lecture/discussion</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. Explain the 4 Ps.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Open a discussion on the importance of the 4 Ps in marketing.</td>
<td>17-59</td>
</tr>
<tr>
<td>60 mins</td>
<td>Group exercise on the 4 Ps</td>
<td>Group work</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. Divide the participants into groups of 3-4.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Ask them to select one type of business (relating, wholesaling, manufacturing or service operation) and choose one product/service from this business.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Explain that each group is expected to develop the product using the materials provided.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Ask them to market their product to the other groups using the concept of the 4 Ps.</td>
<td></td>
</tr>
<tr>
<td>40 mins</td>
<td>Group work presentation</td>
<td>Presentation and discussion</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. Ask one participant from each group to make a presentation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Discuss each presentation with the participants.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Draw out the aspects which were correctly done and make suggestions for improvements in other aspects.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Ask participants to explain what they have learnt from the exercise and how they intend to use the skills acquired.</td>
<td></td>
</tr>
</tbody>
</table>

**Business Improvement Groups (BIG)**

The main objective of the BIG intervention is to enable the entrepreneurs to apply the knowledge and skills gained in prior IYB (refresher) training interventions in their day-to-day business situations.

During BIG sessions, the entrepreneurs identify their problems and assist each other in finding solutions and in developing appropriate action plans. Entrepreneurs learn through problem solving exercises, sharing of experiences and by actually doing what is necessary in order to improve their business performance. This is achieved through the action learning techniques applied
during BIG sessions. By building on each other's ideas and experiences, the entrepreneurs can arrive at the optimum solutions to their problems.

The role of the trainer in BIG sessions is that of a facilitator and a controller of the action learning process.

The BIG intervention is recommended only for those entrepreneurs who have previously attended a regular IYB training intervention or IYB refresher training intervention, have demonstrated by the end of these training interventions that they have active command of the IYB training syllabus and that are committed to further improve their business management skills.

For the success of the BIG intervention, it is important that the selected entrepreneurs are willing to:

- attend each session of the BIG regularly
- openly discuss various aspects of the performance of their enterprises
- agree to treat business information from other participants
- use their own business situations as examples
- deal with difficulties and conflicts which may arise in a manner which will foster a friendly atmosphere of trust and support
- make action plans and implement them
- contribute their share of costs.

To form a Business Improvement Group, you can apply criteria like:

- convenient location to each other
- level of acquired knowledge and adapted skills
- line of business (but not competitors)
- size of business
- age group
- complementary strengths and weaknesses. For example, an entrepreneur may have a good understanding of costing but be weak in marketing. Another entrepreneur may be weak in costing but experienced in marketing; their strengths and weaknesses are complementary to each other.

The BIG follow-up method targets entrepreneurs with common business problems. The Business Improvement Group meets periodically to discuss each other's business problems and to find alternative ways to solve them. These regular BIG sessions form the basis for task work to resolve issues which are of immediate concern to the group. At the end of every session a definite action plan is made by each participant on the basis of the solutions discussed by the group. These action plans focus on improving the performances of individual businesses. The learning process is thus accelerated through doing what is needed to be done in their businesses, sharing knowledge and building each other's experiences and expertise.
The entrepreneurs’ main learning tool in BIG is action learning. Action learning is learning through doing. Action learning develops skills by solving real problems. It is a simple, low-cost method to help entrepreneurs to identify the problems they face and to enable them to use their existing resources to resolve them. The most significant factor in action learning is that the participants find their own solutions using the experiences and resources of the group as a whole.

The sequence of a typical BIG session is as follows:

1. Start with a self-introduction method where each member says what type of business he/she owns, when he/she started, where he/she operates from, etc. This helps to make the group function socially. If the group has met on a prior BIG session, you can cut that point short

2. Ask each member to tell the group what improvement activities he/she has carried out since the end of the last IYB training intervention/BIG session. Try to refer to each one's plan of action completed on occasion of that last training intervention/BIG session. Let the presenting entrepreneur share his/her experience in both his/her achievements and failures.

3. Encourage questions after each presentation with answers from the presenting entrepreneur.

4. From the presentations let the entrepreneur pick one common problem which affects every member’s business. You can assist in defining the problem identified as explicitly and accurately as possible and write the defined problem on a flip chart or chalk board.

5. Divide the participants into two or three small groups to discuss and suggest as many answers to the problem as possible. The solutions should solve the problems already found within the business. Use open questions to help the entrepreneurs think about the cause and to search for solutions. Note that open questions should include words such as why, how, where, when, what etc.

6. Ask each group to present the solutions they have identified and to state how they think those solutions could be used at their businesses. Explore each solutions as it is presented, discussing its pros and cons and the factors to consider for applications. Use the questions to analyze the solutions.

7. Ask the entrepreneurs to prepare the plan of action showing how they can apply those solutions in solving problems in their own businesses. Each entrepreneur is expected to say which solutions he/she intends to use. The entrepreneurs should by now have confidence in their solutions and be prepared to try them out before the next session.

8. Agree with the members on the appropriate time required to implement the solutions before the next session can be arranged. The time suggested is between three and four weeks. This can, however, vary from group to group. Agree on the day and date of the next session. Explain to the entrepreneurs that each member will be expected to explain how she/he succeeded or failed in using the discussed solutions.
9. The facilitator and the entrepreneurs all evaluate the session. The evaluation helps both facilitator and the entrepreneurs to make improvements during the following sessions.

After the BIG session, your role as SIYB trainer is limited to
- make notes of your observations during the BIG session for future reference and monitoring
- complete the SIYB Activity Report
- analyze the participants’ evaluation of the previous session
- follow-up entrepreneurs and see if assistance is required in implementing the action plans.

The participants on their part implement the action plans made at the previous session and read and learn from the IYB manuals, where necessary.

To ensure that the momentum of the programme is not lost, the interval between any two consecutive sessions should not exceed six weeks. In any case, give the participants enough time to implement the planned actions so that you have some results to discuss in the next session.

The cut-off point for BIG follow-up is reached when the majority of the participants feels that their needs have been satisfactorily addressed. If some participants express further need for learning, they might be referred to another Business Improvement Group or opt for Individual Counseling sessions.

Individual Counseling

The objective of Individual Counseling is to enable the entrepreneur to solve his/her own business problems using the knowledge and experiences gained in prior IYB training interventions or BIG sessions.

Individual Counseling provides on-site advice and guidance to each entrepreneur using the actual problems he/she faces so that he/she:
- thinks for him/herself and applies the acquired knowledge appropriately to the specific situations
- develops skills of diagnosing problems and finding solutions to them
- improves business operating and managements skills
- acquires data and information which are useful in managing his/her business well
- improves the performances of his/her business.

Counseling is often confused with consulting. There is a big difference between these two approaches, though. A (management) consultant is concerned primarily with giving the client the optimal solution to the problem and in doing so, the consultant uses his/her own knowledge, experience and methodology. The
client acquires a solution to a problem but does not necessarily acquire the expertise to arrive at that solution.

In IYB counseling, the IYB trainer is primarily concerned with developing the entrepreneur’s skills in dealing with his/her own problems in a systematic way, using the knowledge and skills he/she has acquired in an IYB training intervention or BIG session. The entrepreneur gets not only the solutions to the problems but also gets the skills to deal with such problems in future.

Your role in the Individual Counseling sessions is that of a facilitator. You stimulate the process of solving problems by enabling the entrepreneur to think for himself/herself.

Individual Counseling is the most expensive method of training entrepreneurs. Therefore, it is recommended that the selection of entrepreneurs for Individual Counseling be based only on absolute need for it.

Individual Counseling is recommended only for the entrepreneur who:
- has acquired sufficient knowledge and most of the desired skills through prior IYB training interventions/BIG sessions
- has expressed desire for further guidance
- is willing to pay for this special assistance
- is willing to agree on specific action plans and implement them.

Under very special circumstances an entrepreneur who would normally be referred to a Business Improvement Group first may be considered for Individual Counseling instead. For example, if an entrepreneur:
- has specific problems which he/she cannot discuss in BIG sessions for reasons of business confidentiality and/or social sensitivity.
- cannot be included in BIGs for other reasons, i.e. that:
  - he/she has a severe physical disability
  - his/her place of residence/work is far away from the venue of the nearest BIG.

The following counseling method is recommended. You as an SIYB trainer should
- use the entrepreneur’s business problems as training tools
- observe how he/she reacts to the problems and manages the day-to-day business
- review with the entrepreneur the basic principles of business management in which the solutions to the problems can be found
- stimulate the entrepreneur’s thinking in the right direction so as to enable him/her to solve the problems himself/herself
- point out other relevant issues which need attention
- encourage the entrepreneur to learn more by reading the IYB training materials
• provide the entrepreneur with useful business information or direct him/her where to find such information
• ensure that the entrepreneur makes and implements suitable action plans.

The best venue for a counseling session is the entrepreneur’s work place so that you can see for yourself the actual and practical aspects of his/her business and also the manner in which he/she operates the business. After the first few sessions and when you are thoroughly familiar with the entrepreneur’s work place and business operations, the subsequent counseling sessions could be conducted at the trainer’s office or any place which is mutually convenient to you and the entrepreneur. The duration of each session depends upon your and the entrepreneur’s conveniences.

To prepare for counseling sessions

• make an appointment with the entrepreneur and agree on time, date and place of meeting
• explain the objectives of the counseling session and how it will be conducted.

The sequence of a typical Individual Counseling session is as follows

1. Explain briefly your role as a counselor.
2. Suggest a guided tour of the business or factory, etc.
3. Ask the entrepreneur to state his/her problems and prioritize them according to their importance.
4. Agree with the entrepreneur on the most pressing problems.
5. Select a few most urgent problems and deal with them.
6. Analyze the problems by identifying the root causes.
7. Guide the entrepreneur through the problem solving process by asking open ended questions such as what, why, where, who, when, which, how, etc.
8. Agree on a plan of action for the entrepreneur to follow in solving the problems.
9. Make a summary of the final outcome of the counseling session.
10. Agree with the entrepreneur on the date and time of the next meeting.

You might also want to consider the following tips:

• Never make any snap decisions, give the right answers at the right time.
• Avoid dealing with too many problems or issues in any one counseling session.
• Always make sure the most pressing problems are dealt with first.
• Never provide a direct solution to the problem. Guide the entrepreneur to identify the solution himself/herself.
• Always investigate all circumstances which are relevant to issues or problems and their root cause.
• Do not criticize or appear to be skeptical.
• Always treat all information from the entrepreneur as confidential.

At the end of each counseling session you:
• make notes of any commitments you have made during the session and your observations, on the IC worksheet, for future reference and monitoring
• complete the SIYB Activity Report.

The number and frequency of counseling sessions will depend upon:
• the training needs of the entrepreneur
• the number, extent and nature of the entrepreneur’s problems
• your and his/her conveniences
• the time required by the entrepreneur to implement the action plans agreed at the end of each counseling session.

However, the gap between successive sessions should not be too long since you need to ensure that the entrepreneur is able to and implements the agreed action plans. The cut-off point for Individual Counseling sessions is reached when the client feels that his or her training and counseling needs have been satisfactorily addressed.
8. MONITORING AND EVALUATION

The last step of the SIYB training cycle refers to all activities conducted to measure and analyze the progress in the implementation of the SIYB training intervention and the results of the training effort.

What is Monitoring and Evaluation

Monitoring and Evaluation (M&E) relates to the process of collecting information to determine progress in carrying out planned activities and achieving programme objectives and targeted outputs.

For example, in the SIYB programme, the purpose of M&E is to collect information deemed relevant to measure progress and success of the various parties in carrying out training and related activities.

Though often mentioned as one term, there are clear distinctions between the task of Monitoring and the task of Evaluation. Monitoring focuses on controlling the implementation of activities and the achievement of particular outputs (how it is done), whereas Evaluation is mainly concerned with assessing progress toward the achievement of the objectives of these activities and outputs (why it was done).

Another difference between Monitoring and Evaluation lies in the frequency. Monitoring is an on-going process of data-collection, whereas Evaluation is conducted in periodic intervals (i.e. once a year). Yet, though different in objectives and execution, the two tasks are closely interlinked. Data collected through continuous monitoring are inputs for evaluations, and vice versa.

Why Monitoring and Evaluation is important

Monitoring and Evaluation is important for many reason. Properly done, it enables all involved parties to improve their performance. For example, in the SIYB programme, M&E properly done enables

…you as an SIYB trainer to
  ▪ control, compare and improve your own performance
  ▪ document and proof your performance, and to promote your services to your clients and to training sponsors

…the SIYB project office to
  ▪ measure progress towards the achievement of project outputs and objectives and to plan for corrective action, where necessary

…the clients of SIYB training interventions to
  ▪ express their satisfaction or dissatisfaction with the training supplied
• provide input to see the quality of the training interventions being further improved.

Overview of the SIYB Monitoring and Evaluation system

Illustrated below is the M&E system operated by the SIYB project in Sri Lanka. Similar M&E systems are used in other SIYB projects all over the world. The M&E system has two inter-linked levels:
• The level of local BDS organizations supplying SIYB training interventions and related activities and measuring training output and impact
• The level of the SIYB project office measuring project performance against the set project objectives and outputs, feeding in the M&E data received from the local BDS organizations, and other data collected directly from the entrepreneurs.

The two levels of the SIYB M&E system, and how they are inter-linked

If you are interested to know how information about your training activities is collected and processed on that project office level, please contact directly the M&E expert in that office.

In turn, you have to familiarize yourself closely with the SIYB M&E method and the SIYB M&E tools recommended for trainers because you are expected to make continuous use of them.
### SIYB Monitoring and Evaluation tools for SIYB trainers

Listed and described below are the Monitoring and Evaluation tools for SIYB trainers. Blank copies of the SIYB M&E forms are attached to the Annex of this Trainers’ Guide. You can also download the forms from the web-page of the ILO-SIYB project office, or complete them on-line and mail them directly to the SIYB project office. You will find that these tools are simple to use and that their number has been kept to a minimum to ease the work of the trainers.

<table>
<thead>
<tr>
<th>M&amp;E tool</th>
<th>Function</th>
<th>Filled in by</th>
<th>To be used with / when</th>
</tr>
</thead>
</table>
| **SIYB Entry Form**     | 1. Selection of participants  
2. Training Needs Analysis  
3. Collect baseline data on participants personal and business background | Trainers               | SIYB participants before training           |
| **Daily Training Evaluation forms** | Assess satisfaction level of participants on a daily level | Participants | During training                             |
| **End of Training Evaluation Form** | Assess overall satisfaction level of participants with services rendered | Participants | During training                             |
| **SIYB Activity Report** | Summarizes SIYB participants' personal and business background and provides general data on conducted SIYB training interventions (where, when, for how much etc.) | Trainer in Charge     | After each TOPE / TOE                       |
| **SIYB Performance Card** | Assesses performance of SIYB participants (potential and existing entrepreneurs) after training and opinions on quality of SIYB training interventions | Trainers                | SIYB participants at least 3 months after training, up to one year after SIYB training |
| **SIYB Performance Report** | Summarizes SIYB participants' performances after training in comparison to before training and summarizes client satisfaction | Trainers / staff from DPO / independent interviewers | After Performance visits of a groups of trained |

**SIYB Entry Form**

The purpose and use of the SIYB Entry Form has been explained earlier in this trainer guide when referring to the selection of the SIYB trainees. It is meant as a tool to collect a core set of information about each SIYB applicant, including a brief assessment of his/her current knowledge of basic business management topics (only IYB). Its purpose is twofold:
- To enable SIYB trainers to select and group SIYB applicants
- To allow for comparison of knowledge levels of participants before and after the training intervention (IYB only).

**SIYB Training Evaluation Forms**

The purpose and use of the Daily Training Evaluation Forms, the End of Training Evaluation Forms and the End of Training Evaluation Score sheet is explained on page 44 of this Trainers Guide.
SIYB Activity Reports

The SIYB Activity Report is likely to be a familiar document for every trainer. Its aim is to provide a supervisor or any other interested party with a clear idea about the objective of the conducted training activity, the proceedings of the event and the main observations and conclusions made by the lead trainer.

The SIYB Activity Report also contains a summary of the data collected on the SIYB Entry Card Form from each participant. Furthermore, you have to fill in the overall satisfaction level of the clients with your training services rendered. The overall satisfaction level is calculated with the help of the End of-Training Evaluation Form and the End of Training Evaluation Score sheet (see above).

A copy of the Activity Report is to be forwarded to the SIYB project office. The project office needs the Activity Report as proof of your training activity and to eventually issue your trainers’ license.

SIYB Performance Card

The purpose of the SIYB Performance Card is to collect baseline information about the performance of your clients after training. Comparing the data collected on the SIYB Performance Card with the data collected on the SIYB Entry Form before training, you are able to assess whether your training effort has rendered an impact, i.e. whether your clients have started their businesses and improved their knowledge of business management.

To collect the data on the SIYB Performance Card, it is recommended that you contact your client between 3-6 months after the initial training intervention (SYB and IYB only). Up to six months is thought to give the client sufficient time to translate the theory of training into action on the ground.

Tracing back your clients after some months can be costly and time-consuming. However, it is necessary to provide conclusive proof that your training effort has made a difference. It is the ultimate quality control of your performance. To justify the expenses incurred when following-up on each client, you can combine your effort with a promotional campaign to win these former customers for a new training intervention.

SIYB Performance Report

The SIYB Performance report is summary proof of the impact of the SIYB training intervention on the trainees. The SIYB Performance report is summarizing the data collected on the SIYB Performance Cards from each client after training. A copy of the report is to be forwarded to the SIYB project office. It is needed as proof that your actual training effort has resulted in satisfactory impact.
The use of the SIYB M&E tools, and the flow of information within the M&E system is illustrated below. The method and the tools for collecting and processing M&E information have been kept simple. Thus, it is ensured that you have to invest minimum time and money while gaining maximum benefit from your involvement in the data collection process:

Monitor and evaluate your training activities and the effort will directly pay off:

- Use the M&E data to prove your own track record as trainer to your supervisor and the SIYB project office. Your activity reports are the proof needed by the SIYB project office to eventually issue your trainers' license.
- Use the M&E data to compare your own track record with the track record of other trainers. The project office maintains a database with the activities of all SIYB trainers that you can access via the office web-page. To make use of these internet-based services, you will need your personal SIYB password that is issued to you after certification as an SIYB trainer.
- Use the M&E data to market SIYB training to your clients and to training sponsors. For that purpose, feed the results of your training effort into the design of the next training cycle, to further customize and better promote your training product. Unlock the force of the M&E data and you will soon find it a vital planning, performance measurement and marketing tool.