

LEARN / APPLY / REFLECT

Digital Transformation for Small Businesses

A free course for SME owners who want to improve everyday work before committing to new technology. Build a practical roadmap around customers, processes and useful data.

Your practical learning workbook

Follow the estimated study times shown for each lesson. Course totals include the external videos, notes, activities, a 10-minute understanding check and a 20-30-minute practical assignment. Reading the optional presenter scripts may take extra time.

Use fictional or non-confidential examples. Write on a printed copy or keep your answers in your own document. Online lesson pages also let you save activity notes on your current browser.

Your name: _____

Start date: _____

By the end, you can

- Choose a business problem worth solving.
- Identify suitable cloud, CRM and automation opportunities.
- Outline a small pilot with a baseline and success measures.

Learning route

1. Business outcomes before tools
2. Understanding the current process
3. A shared view of the customer
4. Cloud tools and operating costs
5. Automation with useful controls
6. Useful data and a pilot roadmap

Complete the online understanding check and use the final assignment rubric to review practical application. This workbook is introductory learning, not a professional qualification.

LESSON 01 / PRACTICE

Business outcomes before tools

Frame a digital initiative around a measurable business outcome.

A problem statement should identify the affected customer or team, the delay or error, and the scope. Record a baseline from actual work before setting a target. Keep assumptions visible: faster quotations may improve service but do not automatically guarantee more revenue. Choose a process owner with authority to change the work.

Workplace example

A small distributor wants faster quotations. Its first objective is to reduce missing information and repeated approvals, rather than buy a broad suite of tools.

Your activity

Write a one-sentence problem and record how you would measure improvement.

Self-check

What is the best starting point for a digital project?

- A. A list of fashionable tools
- B. A defined business problem and desired outcome
- C. The largest software package available

LESSON 02 / PRACTICE

Understanding the current process

Find avoidable delays in a simple end-to-end workflow.

Walk through a real transaction with the people doing each step. Distinguish work time from waiting time, and show the information passed between roles. Include one common exception. A process map is a way to agree what to improve, so check whether each step adds value or provides a necessary control before automating it.

Workplace example

An order moves through WhatsApp, a spreadsheet and accounting software. Mapping the flow reveals that staff retype customer details three times.

Your activity

Map one workflow in five to eight steps. Mark one delay and one repeated entry.

Self-check

Why should staff validate a process map?

- A. To make it look more complicated
- B. To confirm it reflects how work actually happens
- C. To avoid measuring the process

LESSON 03 / PRACTICE

A shared view of the customer

Understand where a CRM can improve follow-up and service.

A CRM needs a shared definition of an opportunity and its stages. A stage should describe evidence of progress, not optimism. Keep mandatory fields limited to what the team actually uses, and establish access appropriate to each role. Review stale records regularly. A contact database without accountable next actions will not solve missed follow-ups.

Workplace example

A service company loses track of quotations when a salesperson is away. A shared pipeline records the enquiry, next action and responsible person.

Your activity

List the five customer fields your team needs most and assign responsibility for keeping them current.

Self-check

Which problem is a CRM particularly suited to address?

- A. Fragmented customer follow-ups
- B. A broken warehouse forklift
- C. Insufficient electrical power

LESSON 04 / PRACTICE

Cloud tools and operating costs

Compare subscription convenience with ongoing responsibilities.

Compare offers over the same period and usage assumptions. Ask about minimum terms, extra users, storage, integrations, renewal conditions and export formats. Include staff time for setup and learning. A hosted service still needs accountable user access, data quality and recovery arrangements; ask who performs each responsibility rather than assuming the supplier handles everything.

Workplace example

A retailer compares two cloud tools. It includes user fees, integration work, training and the ability to export records when evaluating the offers.

Your activity

Write five questions to ask a cloud software provider before a trial.

Self-check

Which cost belongs in a cloud software comparison?

- A. Only the first month's subscription
- B. Subscriptions plus setup, training and ongoing support
- C. Only the colour of the interface

LESSON 05 / PRACTICE

Automation with useful controls

Choose a stable, repeatable task for an initial automation.

Describe automation as trigger, input, rule, action and exception. Test missing values, duplicates and unavailable systems, not only the happy path. Prevent repeated execution from creating duplicate transactions. Assign someone to review failures. Start with a reversible workflow whose results can be compared with a sample of manually checked transactions.

Workplace example

A team automates routing approved purchase requests. Incomplete requests go to a person rather than being silently rejected or approved.

Your activity

Choose a repetitive task. Describe its trigger, decision rule, output and exception owner.

Self-check

Which task is a good first automation candidate?

- A. An unclear process that changes every day
- B. A high-stakes decision with no review
- C. A stable task with clear rules and an exception route

LESSON 06 / PRACTICE

Useful data and a pilot roadmap

Connect data quality with a realistic improvement plan.

Give the pilot an explicit decision point: extend, modify or stop. State who collects evidence and how success will be judged. Include adoption, accuracy and operating effort alongside the headline benefit. Data clean-up needs ownership after launch, otherwise the same duplicates return. A small successful pilot is useful evidence, not proof that every branch is ready.

Workplace example

A stock report becomes useful only after duplicate product codes and inconsistent units are corrected. The team tests the corrected process in one product group.

Your activity

Create a 30-day pilot outline: scope, owner, baseline, success measure and review date.

Self-check

What should you do before judging a pilot's improvement?

- A. Record a baseline and agree the success measure
- B. Roll out to every branch
- C. Assume that more data means better data

FINAL ASSIGNMENT / 20-30 MINUTES

Your first digital pilot

A small wholesaler receives orders by messages, then retypes them into a spreadsheet and an accounting system. Quotations are slow and customers chase for updates.

Prepare a one-page response addressing these five points.

1. Choose one problem, a baseline and a measurable target.

2. Map the current steps and one exception.

3. Name the essential data fields and their owner.

4. Define a bounded pilot, its controls and its costs.

5. Set a review date and extend, modify or stop criteria.

Self-review rubric

For each point: 0 = missing; 1 = a relevant idea but vague or incomplete; 2 = a specific, feasible response linked to this scenario, with evidence or ownership where appropriate. Maximum 10. This is your self-rating, not an independent grade.

8-10: refine with your team. 5-7: strengthen weak areas. 0-4: revisit the relevant lessons. Any critical omission still needs attention regardless of the total.

WORKED RESPONSES / READ AFTER TRYING

Compare your reasoning

These are illustrative answers, not the only acceptable responses. Adapt them to your own context.

1. Business outcomes before tools

Pilot problem: quotations for standard products take a median of two working days. Proposed target: one day during a four-week pilot. Scope: one sales team and standard items only. Owner: sales operations manager. Also monitor correction rates so speed does not hide errors.

Knowledge check: B. Clear outcomes guide the choice of process changes and technology.

2. Understanding the current process

Enquiry arrives, sales clarifies details, stock is checked, price is approved, quotation is issued, follow-up is scheduled. Waiting occurs at price approval; customer information is entered twice. Test a shared request record while keeping approval responsibility clear.

Knowledge check: B. A useful map describes real work, including exceptions, rather than an assumed ideal process.

3. A shared view of the customer

Essential fields: customer, contact route, requirement, next action with due date, and owner. Move a quotation to 'sent' only when it was delivered to the customer. The sales owner updates the record; a weekly review catches overdue actions and duplicate contacts.

Knowledge check: A. CRM systems organise customer interactions and support shared follow-up.

4. Cloud tools and operating costs

Ask: what is included in the subscription; what triggers extra charges; who administers access; how can we export complete records; and what support and recovery commitments apply? Compare the answers using the same user count and operating period.

Knowledge check: B. The complete cost includes adoption and operating costs as well as the subscription.

5. Automation with useful controls

Trigger: an approved request is submitted. Rule: route to the buyer for its category. Output: one purchasing task with the request reference. Missing category or duplicate reference goes to the coordinator. Measure handling time and incorrect routing during a limited pilot.

Knowledge check: C. A stable, bounded task makes the automation easier to test and supervise.

6. Useful data and a pilot roadmap

Week 1: measure quotation time and clean core records. Week 2: configure and practise. Week 3: run one-team pilot with daily exception review. Week 4: compare median turnaround, corrections and staff effort. The sponsor decides whether to extend or revise.

Knowledge check: A. A baseline allows a meaningful comparison, while agreed measures keep the review focused.

FINAL ASSIGNMENT / WORKED EXAMPLE

Your first digital pilot

Pilot standard quotations in one sales team for four weeks. Measure median turnaround and correction rates before starting. Use one shared enquiry record with a named owner. Retain price approval, route missing information to a coordinator and compare the results against the agreed baseline before deciding whether to expand.

Your next 30 days

Choose one action, its owner, its due date and the evidence you will review.

Continue your learning

<https://sarah-ching-academy.ferching.chatgpt.site/learn/digital-transformation-small-business.html>

Original Academy teaching notes, exercises and illustrative scenarios. External videos are credited on the online course pages. Presenter scripts are drafts; talking-presenter videos are not included in this workbook.