Project Title	**Boosting Smart Specialization and Encouraging Spin-offs in IT across Danube Region**
Call	**Danube Region Programme**
Project number	**DRP0200277**
Coordinator	**ZEDA**
Project duration	**30 months 0 days**
Project website	(to be filled)
Specific objective	**Creating a framework outlining the obligatory elements of each curriculum/methodology to be developed. This framework should align with the project goals and the developed LAP.**
Activity	**Activity 2.2 Next-gen Pilot Projects for Smart Specialization and IT**

SpinIT

Reporting Template for Deliverable D.2.2.3 Development / Selection of appropriate methodology / curriculum for pilot project implementation			
Due date:	DD.MM.YYYY (to be filled)	Actual submission date:	DD.MM.YYYY (to be filled)
Organization:	University of Pannonia (UP)	Authors:	Tibor Holczinger, Dániel Kulcsár, Péter Balogh
Status: Final (F) Draft (D) Revised draft (RV)	RV	Dissemination level: Public (PU) Confidential, only for members of the consortium (CO)	(to be filled)

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1. Introduction

During D2.2.3 each Territorial Partner (TP) will design and utilize a tailored methodology and curriculum for the implementation of their chosen pilot project focusing on areas such as ICT, Edtech, AR/VR, AI, Industry 4.0, visibility, transparency, predictive capacity, adaptability, and ICT cross-sectoral collaboration. These methodologies and curricula will be specifically designed to enable the effective execution of the Local Action Plan (LAP).

The purpose and aim of this document is to ensure the alignment of methodologies with project goals and local requirements by providing common template for each TP to fill. The following information is to be provided below: basic information about the TP and their pilot project; detailed description of the pilot project; skills to be developed, learning methodologies to be used during the pilot project; curriculum and schedule of the pilot project; and finally, every resource (books, articles etc.) used during the pilot project implementation.

2. TP and pilot project identification

Please provide information about yourself and your selected pilot project.
Use the following table as a template.

Territorial Partner (TP)	
Name of the organization in original language	Optimizacija d.o.o.
Name of the organization in English	Optimization Ltd.
Organization abbreviation	OPTIM
Pilot project	
Name of the pilot project	**3P – Smart Business Processes**
Name of the lead organization in original language	**Optimizacija d.o.o.**
Name of the lead organization in English	**Optimization Ltd.**

3. Introduction of the selected pilot project

The selected pilot project, titled 3P – Smart Business Processes, was developed in response to the growing demand from local SMEs for accessible, hands-on support in digital transformation. Its primary goal is to equip beginner entrepreneurs and small business owners with practical tools, digital skills, and strategic insights that directly impact their operations. Designed as a structured and replicable model, the pilot focuses on automation, online visibility, and collaboration.

Implemented in Varaždin, the pilot follows an eight-session format. After the introductory meeting, participants engage in six practical workshops and conclude with a final session dedicated to presenting their business progress. Each session combines expert guidance, peer learning, and actionable tools.

The workshop topics include:

- CRM Tools and Business Digitalisation
    - Introduction to customer relationship management and using simple digital tools to organize leads, contacts, and tasks.
- SEO and Online Visibility
    - Understanding how search engines work and applying key techniques to improve the visibility of a business website or profile.
- Digital Marketing and Social Media
    - Exploring free and effective methods for reaching target audiences online, with a focus on social media strategy and content planning.
- Visual Communication and Canva
    - Learning to independently create visually appealing content using Canva, eliminating the need to outsource design work.
- Project Management and Collaboration Tools
    - Introducing tools such as Trello, Notion, or Google Workspace to help teams work more efficiently and stay aligned.
- Automation of Business Processes
    - Identifying repetitive administrative tasks and automating them with user-friendly tools, such as automatic email replies or file handling.

Each session includes practical exercises tailored to participants' businesses, encouraging immediate implementation of learned concepts. The pilot prioritizes clarity, simplicity, and direct applicability, making it suitable even for those with limited digital experience.

By addressing real needs with structured support and peer exchange, the 3P pilot contributes to improving SME competitiveness and resilience. It supports the broader objectives of the SpinIT project and aligns with Croatia's Smart Specialization Strategy (S3), particularly in the area of digital products and services. The modular structure and use of free or affordable tools make the model scalable and transferable across the Danube Region.

4. Learning objectives

Please explain what the expected results of the pilot project are.
Use the following table as a template.

The 3P – Smart Business Processes pilot is designed to deliver clear and measurable outcomes that support the digital transformation of small businesses. The expected results include:

- Improved digital competencies - Participants gain hands-on experience with CRM systems, SEO tools, marketing platforms, and automation solutions.
- Reduced time spent on repetitive tasks - Through process automation, businesses streamline daily operations and focus on growth and innovation.
- Greater online visibility - SMEs apply SEO and digital marketing strategies to improve their presence and reach on the web and social media.
- Independent content creation - Entrepreneurs learn to design professional visuals using tools like Canva, reducing dependence on external services.
- Adoption of collaboration tools - Businesses integrate project management and team coordination platforms into their daily workflow.
- Scalable and replicable training model - The pilot creates a modular, low-barrier educational format that can be easily applied in other regions.

Overall, the pilot aims to empower SMEs to take immediate action in digitalising their business processes, leading to greater efficiency, visibility, and competitiveness.

Field to be developed Select one or more.	☒ Smart Specialization ☐ Industrial Transformation ☒ Industry 4.0 Transition
Skills and key competences to be developed	The 3P pilot project focuses on practical, business-relevant digital competences. Each workshop is structured to help participants develop specific skills through hands-on application in their own businesses: CRM tools and business digitalisation - participants learn to organize customer information, track leads, and manage relationships using simple crm platforms. They develop basic data management skills and understand how digital tools can replace paper-based or improvised systems. SEO and online visibility - this workshop introduces the logic of search engines and the importance of online discoverability. Participants gain skills in keyword research, on-page optimisation, and content structuring to improve their position in search results and increase web traffic.

	Digital marketing and social media - participants explore the fundamentals of digital promotion, including audience targeting, channel selection, and content strategy. They learn to plan campaigns and understand key performance metrics across social media platforms. Visual communication and CANVA - hands-on practice, participants acquire basic design skills using canva. They become capable of creating social media visuals, flyers, and presentations without relying on external designers, boosting their visual communication competence. Project management and collaboration tools - participants are introduced to digital tools that support better team coordination, deadline tracking, and task delegation. They develop competences in planning, structuring, and monitoring projects using platforms like trello or notion. Automation of business processes - this session helps participants identify time-consuming repetitive tasks in their workflows and introduces accessible automation tools. They learn how to automate email replies, appointment bookings, document creation, and other routine processes. By the end of the program, participants are equipped with a practical set of digital skills tailored to the realities of small businesses, enhancing their autonomy, productivity, and readiness for further digitalisation.
Specific learning outcomes and results	The 3P – Smart Business Processes pilot is expected to deliver targeted and measurable learning outcomes that correspond to the real needs of small businesses operating in a digital environment. Through a combination of practical workshops, mentoring sessions, and hands-on assignments, participants will likely make tangible progress in several core areas of business digitalisation. One anticipated learning outcome is the ability to critically evaluate and improve internal workflows using digital tools. Participants will be introduced to CRM systems and automation platforms, and they will have opportunities to apply them in their business contexts. This is expected to result in better task tracking, more consistent client communication, and reduced time spent on manual processes. Another key outcome foreseen is the enhancement of digital marketing and online visibility skills. Entrepreneurs may

	strengthen their capacity to structure websites and social media presence using SEO principles and digital marketing strategies. It is expected that they will be able to independently create and manage content in a cost-effective way, reaching wider audiences.
	Visual communication will also be addressed as a key competency. Participants with limited or no prior design experience are expected to learn how to use tools such as Canva to create promotional materials, contributing to a more professional brand image and reducing reliance on external service providers.
	The pilot will also aim to improve project management and team collaboration. Participants will be introduced to tools such as Trello or Notion to support internal planning, task management, and communication. Their use is anticipated to support more structured day-to-day operations and improved internal coordination.
	Lastly, the pilot will promote a better understanding of process automation. By identifying repetitive tasks and implementing basic automation solutions—such as automatic replies, invoicing systems, or file management—participants are expected to enhance efficiency and reduce administrative workload.

5. Teaching and Learning Methods

Please explain the methodology for conducting the pilot project.
Use the following table as a template.

Pilot project implementation and knowledge transfer	
Form Select one or more.	☒ In person ☐ Hybrid ☐ Online (e.g. digital platform, e-learning) ☐ Other (such as):
Description	The 3P pilot is planned to be conducted fully in person, creating opportunities for direct interaction, real-time feedback, and personalized support for each participant. A face-to-face format is expected to enable hands-on engagement with digital tools while encouraging peer learning and collaboration. Each session may combine short theoretical inputs with practical exercises to ensure immediate application to participants' business contexts. This approach is anticipated to be particularly effective in building trust, addressing individual challenges, and maintaining high levels of engagement throughout the program.
Instructional approaches	
Instructional approach Select one or more.	☒ Lectures ☒ Workshops ☐ Other (such as):
Description	The 3P pilot is expected to combine lectures and workshops in order to ensure both knowledge transfer and practical application. Short, focused lectures may introduce participants to key digital concepts and tools, while interactive workshops are planned to provide opportunities for applying those tools to participants' own business needs. This combination is intended to accommodate different learning styles and ensure that theoretical input is reinforced through hands-on tasks and real-life examples.
Methodologies	
Assessments Select one or more.	☐ Preliminary-pilot knowledge test ☐ Post-pilot knowledge test ☐ Mid-term exam ☐ Final exam ☒ Other (such as): Questionaires before and after workshops

Description	Questionnaires will be conducted before and after the workshop series to assess participants' self-perceived level of digital knowledge and readiness. These questionnaires are likely to be delivered via Google Forms and focused on practical areas such as CRM, automation, digital marketing, and collaboration tools. This approach is expected to provide insight into participants' progress and the practical relevance of the training, without relying on formal testing methods.
Feedback Select one or more.	☐ Preliminary-pilot knowledge test ☐ Post-pilot knowledge test ☐ Mid-term exam ☐ Final exam ☒ Other (such as): Satisfaction survey
Description	Participant feedback will be collected through a satisfaction survey conducted at the end of the workshop series. The survey is expected to focus on the relevance of topics, clarity of delivery, usefulness of the tools introduced, and the overall organization of the pilot. This feedback will serve to evaluate the quality of the learning experience and provide recommendations for improving future editions of the programme.

6. Structure and content

Please draft the planned curriculum and schedule of the chosen pilot project. This must include:
- theoretical and practical parts
- training framework (units/timeframes): full list of modules with name and duration

Use the following table as a template.

Duration	
Teaching topics Please provide a list of topic titles.	• Introduction to the 3P pilot and self-assessment • CRM tools and business digitalisation • SEO and online visibility • Digital marketing and social media management • Visual communication using CANVA • Management and digital collaboration tools • Automation of repetitive business processes • Final presentation and feedback session
Learning aims	• Understand the structure and goals of the 3P pilot and assess current digital skills and business needs • Learn how to use CRM tools to manage customer relationships and improve internal organisation • Gain practical knowledge of SEO to increase online visibility and attract more visitors • Develop skills in creating and managing digital marketing campaigns and social media content • Learn to design professional visual content using Canva without external support • Understand project planning, task management, and team collaboration using digital tools • Identify repetitive tasks and learn how to automate them using accessible tools • Reflect on progress, share results with peers, and plan next steps for digital growth
Methodologies e.g. learning video of 5 minutes, quiz, word cloud via Mentimeter	The pilot is planned to combine interactive and practical learning formats tailored to beginner entrepreneurs. Each session may include a short introductory presentation (10–15 minutes), followed by tool demonstrations and real-time application to participants' business contexts. Visual aids such as short videos and screen recordings are expected to support tool explanation. Activities could involve live use of platforms like Canva, Trello, or CRM tools, accompanied by group discussions and peer exchange. In selected sessions, interactive elements such as word

	clouds via Mentimeter and short quizzes might be used to reinforce learning and maintain participant engagement.

Please provide information about each teaching topic.

Use the following table as a template.

Subtopic 1 - CRM tools and business digitalisation	
Duration	1 day – from 14:00 to 16:00
Content	The focus of this session is expected to be on understanding the value of CRM systems in organizing client data, tracking interactions, and maintaining long-term relationships. Key concepts such as contact segmentation, sales pipelines, and task scheduling may be introduced through practical examples to ensure clear understanding and relevance to participants' business needs.
Methodology e.g. watching a video, answering quiz questions via Kahoot	A real CRM platform (e.g., HubSpot or Zoho) will be demonstrated live, showing how to set up customer profiles, log communication, and use follow-up reminders. Participants are expected to be guided through the creation of a basic CRM board tailored to their own business, with individual support from the trainer provided during the implementation process.

Subtopic 2 - SEO and online visibility	
Duration	1 day – from 14:00 to 16:00
Content	Participants will learn how search engines work and why visibility in search results is critical for business success. Key SEO principles will be explained, including keyword research, on-page optimisation, metadata, and mobile responsiveness. The concept of organic vs. paid visibility will also be introduced to provide a comprehensive understanding of digital visibility strategies.
Methodology e.g. watching a video, answering quiz questions via Kahoot	The session will include a walkthrough of free SEO tools like Ubersuggest or Google Search Console. Participants will conduct keyword research for their own products or services and receive feedback on how to improve their web content. The group will also analyse examples of well-structured and poorly structured pages.
Subtopic 3 - Digital marketing and social media management	
Duration	1 day – from 14:00 to 16:00
Content	This session will cover the fundamentals of building a digital marketing strategy using available platforms such as Facebook, Instagram, and Google. Topics will include defining target audiences, selecting appropriate channels, content planning, and understanding reach and engagement metrics.
Methodology e.g. watching a video, answering quiz questions via Kahoot	Participants will work in groups to create a content plan using a shared template. An interactive Mentimeter quiz will test their understanding of platform-specific features. Examples of successful low-budget campaigns will be reviewed and discussed in an open Q&A format.
Subtopic 4 - Digital marketing and social media management	
Duration	1 day – from 14:00 to 16:00
Content	Participants will be introduced to the basics of visual branding and digital design. The importance of visual consistency, font pairing, color usage, and layout principles will be presented in a beginner-friendly format. Canva will be introduced as a practical, no-cost design solution.
Methodology e.g. watching a video, answering quiz questions via Kahoot	The session will include a live demonstration of Canva, with participants following along on their own devices. Each participant will create a flyer or social media visual for their business, applying the principles discussed. The visuals will be shared in a group setting for informal feedback and peer learning.
Subtopic 5 - Management and digital collaboration tools	
Duration	1 day – from 14:00 to 16:00

Content	This session will explore how digital tools can help organize business tasks, set deadlines, and improve team communication. Concepts such as project stages, milestones, dependencies, and resource allocation will be introduced using real-life business examples.
Methodology e.g. watching a video, answering quiz questions via Kahoot	Participants will learn to use platforms like Trello or Notion by creating a sample project board for their own operations. Tasks will be assigned, deadlines set, and collaboration features tested. The group will participate in a simulation exercise to experience digital teamwork in action.
Subtopic 6 - Automation of repetitive business processes	
Duration	1 day – from 14:00 to 16:00
Content	The session will help participants identify repetitive manual tasks that could be streamlined through automation. Topics will include data entry, appointment booking, email follow-ups, and invoicing. The session will also cover the basics of no-code platforms and the logic behind automation workflows.
Methodology e.g. watching a video, answering quiz questions via Kahoot	A step-by-step demo of tools like Zapier or Make will be conducted, showing how to create automated flows (e.g., sending a welcome email after a form submission). Participants will then define one task in their own business to automate and begin building the process with trainer support.

Resources

Please provide a list of resources (books, journal articles, surveys, softwares etc.) used during the pilot project implementation below.

1. Digitalization & CRM Tools

Resources used during the pilot:

- HubSpot CRM
- Zoho CRM
- Salesforce (introduced)
- Bitrix24
- Monday.com
- Google Workspace (Gmail, Calendar, Drive, Docs)
- Airtable (demoed as an advanced, flexible CRM)

Learning resources:

- blog.hubspot.com/sales/crm-guide
- zoho.com/crm/resources/
- academy.salesforce.com/
- en.wikipedia.org/wiki/Customer_relationship_management
- monday.com/blog/crm/crm-guide/
- airtable.com/learn

2. SEO & Online Visibility

Resources used during the pilot:

- Google Search Console
- Google Trends
- Ubersuggest
- AnswerThePublic
- Google My Business
- Yoast SEO (presented as WordPress SEO tool)
- Screaming Frog SEO Spider (advanced users)

Learning resources:

- moz.com/learn/seo/what-is-seo
- ahrefs.com/blog/seo-basics/
- support.google.com/webmasters/answer/7451184
- en.wikipedia.org/wiki/Search_engine_optimization
- neilpatel.com/ubersuggest/
- backlinko.com/seo-this-year

3. Digital Marketing & Social Media

Resources used during the pilot:

- Meta Business Suite
- Mailchimp
- Buffer
- Later
- ChatGPT (text and email generation)
- Google Forms (feedback & lead capture)
- Bitly (link tracking and shortening)
- Hootsuite (presented as alternative)

Learning resources:

- mailchimp.com/resources/email-marketing-field-guide/
- facebookblueprint.com/student/catalog
- hootsuite.com/resources
- en.wikipedia.org/wiki/Digital_marketing

- socialmediaexaminer.com/
- neilpatel.com/what-is-digital-marketing/

4. Visual Content Creation (Canva)

Resources used during the pilot:

- Canva (free and pro features)
- Pexels
- Pixabay
- Unsplash (mentioned as alternative)
- Adobe Express (optional intro)

Learning resources:

- designschool.canva.com/
- canva.com/learn/
- en.wikipedia.org/wiki/Graphic_design
- visme.co/blog/graphic-design-tutorials/

5. Project Management & Collaboration

Resources used during the pilot:

- Trello
- Notion
- Google Workspace (Docs, Sheets, Calendar)
- Slack (mentioned in context of team collaboration)
- Asana (presented as comparison to Trello)

Learning resources:

- trello.com/guide
- notion.so/help/guides
- asana.com/guide
- en.wikipedia.org/wiki/Project_management
- coursera.org/learn/project-management-principles
- atlassian.com/agile/project-management

6. Business Process Automation

Resources used during the pilot:

- Zapier
- Make.com
- Google Forms + Sheets + Gmail
- ChatGPT + Google Sheets (for text generation and sorting)

- IFTTT (If This Then That – presented as simple automation tool)

Learning resources:

- zapier.com/learn/
- make.com/en/academy
- nocode.tech/tools/zapier
- en.wikipedia.org/wiki/Business_process_automation