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CVETNET HANDBOOK
COMPANY TRAINING ASSESSMENT
CHECKLISTS

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Innovative Methodology on Digital Transformation and Intergenerational Training at SMEs

Assessment and Implementation Methodologies for Individual CVET Training Pathways for SMEs

Partners:

WIFI-WKO – Vienna (AT)	Cl. Neumann
CCC – Prague (CZ)	D. Zufanova, M. Mares
BCCI – Sofia (BG)	M. Tancheva, N. Dicheva
Official CCISN – Madrid (ES)	C. Ayllon, R.Velasco
German-Bulgarian CCI (AHK-Bulgarien)	K. Vranchev
CCI – Terrassa (ES)	A. Pajaron, S. Perez
CCI – Dobrich (BG)	V. Stoyanova

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COMPANY TRAINING ASSESSMENT CHECKLISTS

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INTRODUCTION

The CVETNET project has designed this set of tools so that any SME could overhaul the current staff's skills and competences to use the potential of strengthening them via intergenerational collaboration and Digital Education.

The current economic environment offers so many uncertainties that SMEs should react quickly to the changes and opportunities offered by digital work tools. They should encourage all the employees as well to be pro-active and innovative reinforcing each other's competences and skills to become stronger and more resilient to current challenges.

Teamworking, innovation and Digitalization are ideas that should pervade any activity of the company. Consequently, training activities become essential to update and make each SME stronger.

In this guide, the responsible of the activity will try to collect all the required information about the SME in order to design the most suitable training pathway. This section is divided in different needs regarding the strategies (digital and intergenerational) of an SME.

First, the interviewer should learn with the company about its strategy: Core values, organizational structure, vision, COVID-19 effects, level of digitalization and training budget.

Regarding the analysis of the digital and intergenerational aspects of the SMEs, the interviewer should note the following topics: it should be necessary to collect indicators about the different generations in the SME, about teamworking and collaboration between different generations. In addition, the interviewer should focus on the SME's digital strategy to recognize the eventual gaps that should be covered and strengthened.

In the final part of this chapter, CVETNET project offers a guide to assess and improve the training activities of the company in order to make them more fruitful for entrepreneurs and employees.

COMPANY TRAINIG ASSESSMENT CHECKLIST[1]
(COMPANY STRATEGY - PART 1)

Topic	Status	Comments
COMPANY STRATEGY I	✓	
Company Vision		
Company Mission		
Company Core Values		
Organizational Structure (Departments, Size)		
Covered Markets / Business Environment		
International / National Company		
Number of Subsidiaries and Number of Staff Abroad		
Effects of Current Economic Situation to the Company		

COMPANY TRAINING ASSESSMENT CHECKLIST[2]
(COMPANY STRATEGY - PART 2)

Topic	Status	Comments
COMPANY STRATEGY II	✓	
Current Strategic Priorities & Perspectives		
Future Goals – Intended Results		
Stakeholders Engaged		
Funding Possibilities for Training Measures		
Responsible Person for Digitalization in the Company		
Level of Digitalization of the Company		

COMPANY TRAINING ASSESSMENT CHECKLIST
(STAFF STRATEGY – PART 1)

Topic	Status	Comments
STAFF STRATEGY I	✓	
Staff Assessment (Number of Employees, Departments etc.)		
Intergenerational Aspects: Number of Staff by Generation		
Level of Intergenerational Cooperation		
Key Performance Indicators (KPIs) for Staff		
Performance Appraisals		
Strategic Budget for Staff in General		
Strategic Budget for Staff for Education and Training		
Responsible Person for HR		

COMPANY TRAINING ASSESSMENT CHECKLIST
(STAFF STRATEGY – PART 2)

Topic	Status	Comments
STAFF STRATEGY II	✓	
Onboarding Measures for New Staff		
Intergenerational/Mentor Training		
Current Assessments for Promotion		

COMPANY TRAINING ASSESSMENT CHECKLIST[3,4]
(INTERGENERATIONAL STRATEGY – PART 1 - COMPANY)

Topic	Status	Comments
INTERGENERATIONAL STRATEGY I - COMPANY	✔	
Are You Aware That Each Proposed Policy / Decision Affects All Generations in the Company?		
Do you Reduce Intergenerational Conflict in the Workplace by Encouraging Employees to Recognize, Value and Respect the Perspectives and Experiences of One Another Across Generations?		
Did You Develop an Age Profile for Your Workforce, Using One of the Existing Tools or by Creating Your Own Audit?		
Do You Recruit on Basis of Age or on Skills and Abilities to Fulfill a Role?		
Do You Offer Continuity for Your Staff – by Retaining Skills / Business Contacts?		

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COMPANY TRAINING ASSESSMENT CHECKLIST[5,6]
(INTERGENERATIONAL STRATEGY – PART 2 - COMPANY)

Topic	Status	Comments
INTERGENERATIONAL STRATEGY II - COMPANY	✔	
Do You Prefer a Richer Mix of Skills / Experience / Capabilities in the Workplace to Cope with New Tasks / Change / Opportunities?		
Do You Have a Diverse Intergenerational Mix of People Reflecting Your Client's Base?		
Do You Create Opportunities for All Employees to Understand the Importance of Working as a Team to Achieve a Goal?		
Do Your Employees Recognize the Strengths of All Generations, and How Each Person's Unique Knowledge Base and Skills Assist the Team?		
Do You Offer Flexible Work Allowing for Working Carers, and Give Younger People Time Out to Pursue Other Interests or to Get Extra Qualifications?		

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[5] http://ageactionalliance.org/intergenerational-teams-the-future-of-the-workplace/

[6] https://www.gu.org/app/uploads/2018/06/Intergenerational-Report-MMMI-Generations-in-the-Workplace.pdf

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COMPANY TRAINING ASSESSMENT CHECKLIST[7,8]
(INTERGENERATIONAL STRATEGY – PART 3 - COMPANY)

Topic	Status	Comments
INTERGENERATIONAL STRATEGY III - COMPANY	✔	
Do You Reward Flexible, Adaptable Thinking of Staff?		
Do You Trust Older Employees That They Know What Works and What Does Not?		
Do You Currently Offer a Skills Pool to Close a Possible Skills Gap?		
Do You Offer Training Opportunities to Build Employee Capacity (Workshops, Continuing Education, Conferences, etc.)?		
Do You Use a Knowledge Transfer System to Ensure That the Skills and Expertise of Veteran Employees Remain Organizational Assets (Mentoring, Knowledge Management Systems, Written Documentation, etc.)?		
Do You Allow for Remote Work?		

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[7] http://ageactionalliance.org/intergenerational-teams-the-future-of-the-workplace/

[8] https://www.gu.org/app/uploads/2018/06/Intergenerational-Report-MMMI-Generations-in-the-Workplace.pdf

COMPANY TRAINING ASSESSMENT CHECKLIST[9,10]
(INTERGENERATIONAL STRATEGY – PART 4 - COMPANY)

Topic	Status	Comments
INTERGENERATIONAL STRATEGY IV - COMPANY	✔	
Do You Offer Brainstorming Sessions for the Whole Team?		
Do You Set Team Goals with Roles, While Recognizing the Assets Each Member Brings?		
Do You Help in Selecting New Team Members in Case a Team Grows or Someone Leaves Based on the Skills Requirement?		
Do You Proactively Support Job Sharing / Flexible Rotations?		
Do You Practice Inter-Generational Skills Sharing, e.g., When You Recognize the Talent of an Employee and You Ask Him to Share His Experience with Other Staff?		
Do You Team Staff of Different Generations Together on Purpose on Projects?		

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COMPANY TRAINING ASSESSMENT CHECKLIST[11,12]
(INTERGENERATIONAL STRATEGY – PART 5 - COMPANY)

Topic	Status	Comments
INTERGENERATIONAL STRATEGY V - COMPANY	✔	
Do You Offer Intentional Feedback to Employees Using a Variety of Communication Formats?		
Do You Reward Employees for Exceptional Work Using a Variety of Incentives (e.g., Parking Privileges, Newsletter Announcements, Awards, Bonuses, etc.)?		
Do Managers Receive Training on How to Increase Communication Among Generations?		
Do Employees of Different Generations Interact Informally Inside and Outside of the Workplace?		

COMPANY TRAINING ASSESSMENT CHECKLIST[13]
(INTERGENERATIONAL STRATEGY – PART 6 – OLDER STAFF)

Topic	Status	Comments
INTERGENERATIONAL STRATEGY VI - OLDER STAFF	✔	
Do You Offer an Invigorating Environment for Older Employees Where They Can Learn Skills from Younger Members of the Team?		
Can Older Employees Pass Their Experience on by Being a Mentor / Capacity Builder?		
Do You Offer Flexible Working – Fitting in Care Possibilities and Filling in Shifts During Summer Holidays / School Collection Times, etc.?		
Can Older Staff Change Roles – so Work Becomes Less Onerous – e.g., by Reducing Working Hours?		
Do You Foster the Ability to Keep Older Employees Working and Earning Their Salaries?		
Do You Offer Social, Health or Wellbeing Benefits for Senior Employees for Staying Active?		

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[13] http://ageactionalliance.org/intergenerational-teams-the-future-of-the-workplace/

COMPANY TRAINING ASSESSMENT CHECKLIST[14]
(INTERGENERATIONAL STRATEGY – PART 7 – YOUNGER EMPLOYEES)

Topic	Status	Comments
INTERGENERATIONAL STRATEGY VII - YOUNGER EMPLOYEES	✓	
Do You Offer an Invigorating Environment for Younger Employees Where They Can Learn Skills from Older Members of the Team?		
Can Younger Staff Learn Life Skills in Your Company, e.g., Inter-Personal Skills from More Experienced People?		
Do You Promote Flexible Working – Especially for Parents?		
Can the Youngest Staff Steadily Upgrade Their Role as Older Employees Phase Out Rather Than Find Themselves Promoted Beyond Their Capabilities?		

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[14] http://ageactionalliance.org/intergenerational-teams-the-future-of-the-workplace/

COMPANY TRAINING ASSESSMENT CHECKLIST
(STAFF EDUCATION - PART 1)

Topic	Status	Comments
STAFF EDUCATION I	✓	
Current and Planned HR Measures for Internal Training (Internal Trainer, Academy)		
Current and Planned HR Measures for External Training (External Trainer)		
Current and Planned HR Measures for Open Training at an External Training Institute		
Assessment of General Training Needs in the Company		
Assessment of Training Needs in Digitalization: Skilled Staff		
Assessment of Training Needs in Digitalization: Soft Skills		
Training Initiative(s) from Staff Possible		
General Skill Gaps in the Company		

COMPANY TRAINING ASSESSMENT CHECKLIST
(STAFF EDUCATION – PART 2)

Topic	Status	Comments
STAFF EDUCATION II	✓	
General Skill Gaps in the Company According to the Respective Departments		
Responsible Person for Training Needs Assessment from HR		
Communications Plan in Education and Training / Promotion		

COMPANY TRAINING ASSESSMENT CHECKLIST[15]
(TRAINING GAPS IMPROVEMENT - PART 1)

Topic	Status	Comments
TRAINING GAPS IMPROVEMENT I	✔	
Make Learning More Flexible and Accessible		
Choose the Right LMS (Learning Management System, User-Friendly, Tailorable Design, Content and Delivery Options)		
Offer Microlearning (Apps)		
Motivate the Managers to Get Involved		
Reflect Upon Future Skills Need		
Open Contact with Employees		
Include Management in Needs Assessment Meetings		

COMPANY TRAINING ASSESSMENT CHECKLIST[16]
(TRAINING GAPS IMPROVEMENT - PART 2)

Topic	Status	Comments
TRAINING GAPS IMPROVEMENT II	✓	
Monitor the Performance Before and After the Training		
Use Tools That Serve Remote Workers and In-Office Teams		
Support, Encourage and Offer Mentorship for Employee Training		
Use Webinars Instead of In-Person Workshops		
Set Up a Discussion Forum		
Organize One-On-One Sessions with Managers and Mentors		
Match Different Learning Options and Preferences (Intergenerational Learning)		

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[16] Compare: https://www.talentlms.com/blog/six-ways-improve-ongoing-training-for-employees/

COMPANY TRAINING ASSESSMENT CHECKLIST[17]
(TRAINING GAPS IMPROVEMENT - PART 3)

Topic	Status	Comments
TRAINING GAPS IMPROVEMENT III	✔	
Design Content That Combines Text, Graphic and Video Elements		
Offer Simple Exercises That Offer Quick Wins, to Prepare for Larger Content		
Offer Cross-Department Training (for Better Understanding Other Roles and Departments or Common Goals)		
Allow Intergenerational Learning (Reverse Mentoring) to Build Empathy and Team Spirit Within and Between Departments		
Organize Collaborative Online Opportunities (Employees with Different Skills Work Together to Solve a Problem)		

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COMPANY TRAINING ASSESSMENT CHECKLIST[18]
(TRAINING GAPS IMPROVEMENT - PART 4)

Topic	Status	Comments
TRAINING GAPS IMPROVEMENT IV	✔	
Ask Employees What Training They Want		
Set Up Learning and Development Goals as a Regular Part of Performance Management		
Create Simple (Convenient and Private) Feedback Channels		
Make Liberal Use of Surveys During and After Training		
Constantly Improve Ongoing Training with the Best Tools Available		

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[18] Compare: https://www.talentlms.com/blog/six-ways-improve-ongoing-training-for-employees/

COMPANY TRAINING ASSESSMENT CHECKLIST (SKILLS GAP ANALYSIS)[19]

Topic	Status	Comments
SKILLS GAP ANALYSIS	✓	
Planning: Identify the Skills the Job Requires and Compare Them to an Employee's/ Team's Actual Skill Level		
Identify Important Skills Valued in the Company		
Skills Employees Need to Do Their Jobs Well, Now and in the Future		
Measure Current Skills (by Surveys, Assessments, Interviews, Performance Reviews, Software)		
Act on the Data by Training / Hiring		

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[19] Compare: https://resources.workable.com/tutorial/skills-gap-analysis