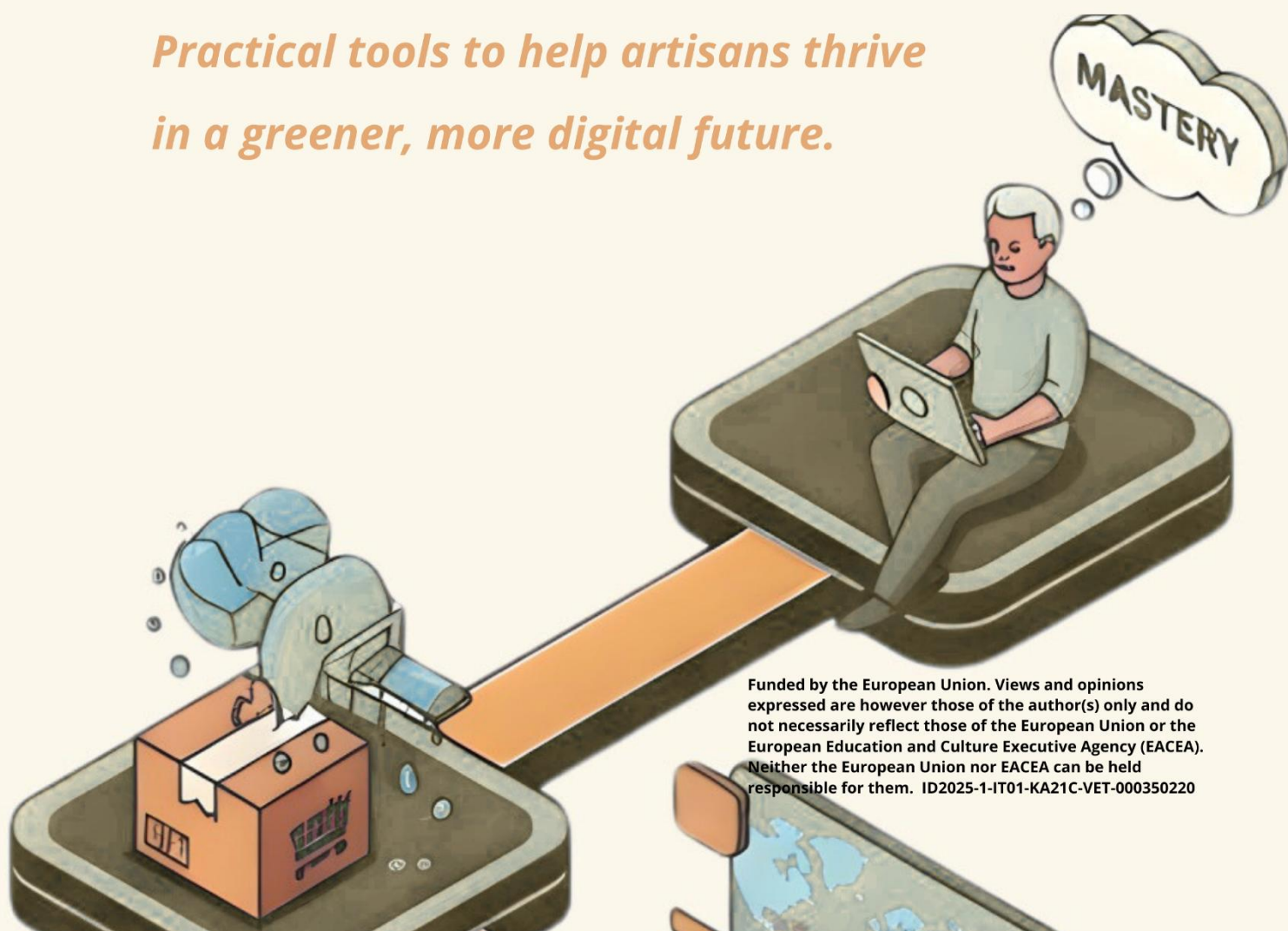


FACILITATOR'S TOOLKIT

*Practical tools to help artisans thrive
in a greener, more digital future.*



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The ACTIVATE Facilitator's Toolkit: Introduction

Welcome to the ACTIVATE Facilitator's Toolkit. As educators, trainers, consultants, and mentors, you are the crucial bridge between European strategies and the practical, day-to-day realities of our local artisans, craftspeople, artists, and self-employed micro-entrepreneurs.

Across Europe, the craft sector is a vibrant and essential powerhouse, encompassing approximately 153 million people and driving a market valued at around 50 billion euros. This sector preserves cultural heritage, fosters local distinctiveness, and builds authentic human connections. However, in today's rapidly evolving, tech-driven market, artisans face a dual challenge: navigating the Green Transition and the Digital Transformation.

Many traditional artisans are naturally resistant to change, fearing that digital tools might dilute their heritage or that sustainability frameworks are too complex. Our goal is not to change their craft, but to protect it. By equipping artisans with targeted green and digital competencies, we automate routine operational tasks (like billing, accounting, and marketing) and shorten supply chains, thereby preserving their valuable time for what truly matters: their art, their trade, and their passion.

This toolkit is for a smooth and precise guide them on this transformative journey.

About the ACTIVATE Project

ACTIVATE (*Using Green and Digital Transition to Increase Artisans and Small Business Competitive Advantage*) is an Erasmus+ Small-Scale Partnership in Vocational Education and Training (VET). Co-created by a transnational consortium of expert organizations—Artes (Italy), Social Effect Network - SEN (Lithuania), and Nikanor (Bulgaria)—the project addresses a critical gap: traditional training programs are often too long, overly theoretical, and highly segmented.

ACTIVATE addresses this by offering a unified, highly practical, and agile framework designed specifically around adult learning styles. The project's final objective is simple yet profound: to offer a practical, accessible path for supporting local creative communities in achieving the EU Green Deal targets and Sustainable Development Goals (SDGs), ultimately boosting their profitability and competitive advantage.

Purpose of This Toolkit

This Toolkit serves as your primary companion piece to the ACTIVATE Roadmap. While the Roadmap outlines a structural step-by-step assessment for artisans to analyse their current business models, this Toolkit provides the core educational substance, resources, and practical activities required to fill their knowledge gaps.

To ensure its usability, clarity, and relevance, this toolkit has been built through a collaborative, "learning-by-doing" process and has been rigorously validated and tested by educators and artisans across Italy, Lithuania, and Bulgaria.

As a facilitator, your role is to use these materials to spark awareness, lower the barriers to entry, and help artisans realize that sustainability and digitalization are not administrative burdens, but powerful mechanisms for future profitability.

Structure of the Toolkit: What's Inside?

To make your facilitation as smooth and flexible as possible, the toolkit is broken down into highly practical, bite-sized components that can be accessed anytime—even via smartphones while working in the workshop:

1. **Digitalization Track:** Focuses on the *DigComp* framework. These highly focused micro-lessons break down automated billing, digital accounting, online ordering, and basic digital marketing. The language is kept completely accessible and inclusive, strictly avoiding tech-heavy jargon that might discourage learners.
2. **Sustainability Track:** Focuses on the *GreenComp* framework, Environmental, Social, and Governance (ESG) principles, and the SDGs. These lessons clarify how small actions—like optimizing energy use or selecting non-toxic, locally-sourced materials—directly translate into a smaller carbon footprint and greater consumer trust.
3. **Actionable Templates & To-Do Lists:** Ready-made, highly visual sheets designed to help artisans systematically break down their daily business tasks (such as marketing, billing, or sourcing suppliers) and inject sustainable or digital alternatives.
4. **Multimedia Support Materials:** short eLearning materials, available in the languages of the partners –accessible for free. These allow busy artisans to absorb theoretical concepts and practical "how-tos" audibly while working with their hands.
5. **The Supply Chain Shortener Guide:** Practical instructions on utilizing digital communication tools to connect closer with local clients and suppliers, ensuring fair returns regarding employment, entrepreneurial support, and local profit.

How to Use This Toolkit as a Facilitator

This material is explicitly designed for a flexible, learner-centered delivery. Because artisans face massive constraints on their time and costs, we recommend following these core facilitation tips:

- **Integrate with the Roadmap:** Always use the toolkit resources to solve specific problems identified when the artisan completes their personal *ACTIVATE Roadmap*.
- **Emphasize the Dual Benefit:** Frame every lesson around two interconnected pillars: *Planet and Profit*. Show them that tracking carbon footprints saves energy costs, and implementing automated billing saves time.

- **Keep it Practical:** Rely heavily on the micro-units, short video tutorials, and localized examples. Focus on quick wins that they can implement immediately in their business operations.
- **Be an Ally, Not Just a teacher:** Understand the cultural value of their work. Assure them that automation exists to handle routine administrative burdens so that their irreplaceable, human craft can remain fully intact.

Thank you for your dedication to upskilling Europe's craft community. Through your guidance, we are ensuring that traditional craftsmanship survives and thrives in a greener, digital tomorrow!

Roadmap Work Areas and Course Units

How the Roadmap and Course Units Connect

The ACTIVATE Roadmap and the ACTIVATE Course Units serve two different but connected purposes. **Roadmap Work Areas (M1–M7)** describe the everyday activities of an artisan or craft-based micro-enterprise and help identify where improvement is needed. **Course Units (Unit 1–7)** provide the learning content, frameworks, tools and exercises that can support those needs. The relationship is not one-to-one: one Roadmap Work Area may connect to several Course Units.

Roadmap Work Area	Main business focus	Primary Course Unit(s)	Supporting Course Unit(s)
M1 — Business Administration & Accounting	Recording income and expenses, cash flow, records, documents and basic administration.	• Unit 2 — Digital Transformation Basics	• Unit 3 — Digital Finance Fundamentals
M2 — Billing, Pricing & Customer Management	Invoicing, pricing, payments, outstanding balances and customer records.	• Unit 3 — Digital Finance Fundamentals • Unit 5 — Sales & Customer Service	• Unit 2 — Digital Transformation Basics
M3 — Marketing, Communication & Visibility	Brand identity, storytelling, online presence, communication and visibility.	• Unit 4 — Marketing for Artisans	• Unit 5 — Sales & Customer Service (when communication moves into conversion, retention and advocacy)
M4 — Production & Materials Management	Materials, production processes, quality, waste and resource use.	• Unit 1 — The Green Transition & Circular Economy	• Unit 6 — Logistics & Short Supply Chains
M5 — Supply Chain & Partnerships	Suppliers, sourcing, logistics, deliveries, collaboration and local networks.	• Unit 6 — Logistics & Short Supply Chains	• Unit 1 — The Green Transition & Circular Economy (sustainable sourcing and shorter supply chains)
M6 — Sales & Customer Service	Selling, orders, value-based pricing, customer experience, retention and feedback.	• Unit 5 — Sales & Customer Service	• Unit 3 — Digital Finance Fundamentals (digital payments) • Unit 4 — Marketing for Artisans (customer journey and communication)
M7 — Continuous Learning & Skills Development	New skills, peer learning, mentoring, knowledge transfer and professional development.	• Unit 7 — Light-Touch Human Resource Management	• Unit 2 — Digital Transformation Basics (where new digital competences are required)

Key elements in the toolkit and how to use them

Before introducing the learning units, facilitators should guide participants through the ACTIVATE starting documents. These documents help participants understand their current green and digital readiness, identify the most relevant learning areas, and turn the results into a practical personal roadmap. The facilitator's role is not to assess or judge participants, but to help them interpret their answers honestly and translate them into realistic, motivating next steps.

Key documents and how to use them

Digital Readiness Self-Assessment. This tool helps participants identify how far digital tools already support their business administration, billing, marketing, production, supply chain, sales, learning and digital safety. Facilitators should use it at the beginning of the pathway, asking participants to answer based on what they currently do, not what they would like to do. Encourage honest scoring and reassure them that the tool is not a test. Pay special attention to the digital safety score, because a low result should lead to at least one basic safety action in the first 30-day plan.

Sustainability Self-Assessment. This tool helps participants reflect on their sustainability readiness across the same key business areas, including materials, production, waste, sourcing, pricing, customer communication and continuous learning. Facilitators should use it alongside the digital assessment and help participants connect each answer to concrete workshop practices, such as sourcing choices, packaging, waste reuse, customer guidance or sustainability communication. If participants struggle with terminology, refer them to the glossary before moving to scoring.

Where to Start Guide. This guide converts digital and sustainability results into a combined readiness picture and recommends 2–3 priority areas for action. Facilitators should use it after both self-assessments are completed, supporting participants to calculate the combined score for each work area and interpret it as Start Here, Developing or Ready. Apply the recommendation logic carefully: start from the lowest score, check for hidden one-dimension gaps, add the next-lowest or most urgent area, and let the participant choose a realistic third priority.

Summary Card. This card provides a compact overview of the participant's scores, strongest areas, biggest gaps, priority areas and first action. Facilitators should use it as a bridge between assessment and planning. Ask participants to copy their scores, identify their strongest and weakest areas, and select the 2–3 priorities they want to take forward. The Summary Card is useful for one-to-one mentoring, group debriefing and quick follow-up during later sessions.

Personal Roadmap Workbook. This workbook transforms assessment results into a structured improvement plan built around three sprints: 30 days, 90 days and 12 months. Facilitators should use it once participants have chosen their priorities. Guide them to plan one practical 30-day action for each priority, then build 90-day habits and 12-month structural goals. Keep actions

concrete, achievable and connected to the course units. Encourage participants to review each sprint before moving to the next one.

The suggested facilitation sequence is simple: first, introduce the purpose of ACTIVATE and the seven work areas; second, ask participants to complete the digital and sustainability self-assessments; third, use the Where to Start Guide and Summary Card to identify priorities; fourth, connect those priorities to the learning units presented in the next section; and finally, support participants in completing their Personal Roadmap Workbook. This ensures that the learning pathway is personalised: participants do not need to start everywhere but should focus on the units that respond to their most relevant readiness gaps, business needs and motivation.

During facilitation, remind participants that the learning units are practical support tools, not isolated lessons. Each unit provides key concepts, examples and actions that can help them complete one part of their roadmap. For example, a participant with weak scores in marketing and visibility should be directed to Unit 4, while someone struggling with payments and cash flow may need Unit 3. If a participant has low digital safety, include a basic safety action even if another unit appears more urgent.

Facilitators should also create space for reflection and peer exchange. Participants may need support to translate a score into a real action, to choose between competing priorities, or to simplify an ambitious idea into something they can start within seven days. The most useful facilitation approach is to keep the process practical, respectful and learner-centred: help participants recognise what they already do well, identify one or two meaningful improvements, and commit to manageable steps that strengthen both sustainability and digital readiness.

Overview of the learning contents

The ACTIVATE learning programme is organised into seven units that support participants in strengthening both their green and digital readiness. Each unit introduces practical concepts, examples and actions that facilitators can use to guide participants towards the priorities identified through the self-assessment tools.

- Unit 1 — The Green Transition & Circular Economy
- Unit 2 — Digital Transformation Basics
- Unit 3 — Digital Finance Fundamentals
- Unit 4 — Marketing for Artisans
- Unit 5 — Sales & Customer Service
- Unit 6 — Logistics & Short Supply Chains
- Unit 7 — Light-Touch Human Resource Management

The full modules are available in the partners' languages on the project website. The following overview summarises the key points of each unit for facilitators, helping them quickly identify which content is most relevant to participants' learning needs and personal roadmaps.

1 — Green transition and circular economy

Aim	To help artisans apply the green transition in small-scale craft production through circular economy principles and practical choices in materials, production, waste reuse, packaging, product life, collaboration, and transparent communication.
Key takeaways	• Sustainability can start with small, visible improvements that reduce environmental impact and keep resources in use for longer. • Circular craft production moves from a linear “take-make-dispose” model to a circular model focused on waste prevention, reuse, repair, and longer product life. • Artisans should consider the full product life cycle: sourcing, production, use, maintenance, repair, reuse, recycling, or safe disposal. • The simplified Eco-Framework is built around five pillars: materials, process, waste loop, packaging, and transparency. • Responsible communication should be specific, evidence-based, and verifiable, avoiding vague claims such as “eco-friendly”.

Green actions

- **Choose more sustainable materials.** Use recycled, upcycled, reclaimed, local, natural, or certified materials where suitable, and prefer safer, non-toxic inputs for dyes, glues, paints, oils, waxes, soaps, candles, ceramics, and textiles.
- **Reduce waste during production.** Plan cutting, mixing, shaping, and assembling to minimise scraps through efficient cutting layouts, zero-waste patterns, modular designs,

standard sizes, batching, made-to-order production, LED lighting, efficient equipment, heat pumps, or renewable energy where possible.

- **Reuse scraps and by-products.** Collect, sort, and reuse scraps as smaller products, decorative accents, repair patches, samples, teaching materials, or packaging fillers, and create a labelled scrap library by type, colour, size, and possible use.
- **Improve packaging and delivery choices.** Minimise packaging, remove unnecessary layers, use recycled, recyclable, reusable, biodegradable, or compostable options, fit packaging closely to the product, consolidate orders, and offer local pick-up or delivery where possible.
- **Design for durability and repair.** Create durable, repairable products using strong materials, reinforced stress points, replaceable straps, removable buttons, modular parts, visible mending options, care cards, repair guides, spare parts, or repair services.
- **Collaborate locally.** Work with local networks to exchange surplus materials, borrow tools, share suppliers, co-organise markets, use a Library of Things, or access shared workshops.
- **Measure and communicate progress.** Track one or two simple indicators and communicate concrete actions such as reused materials, reduced packaging, repair options, local sourcing, or measurable waste reduction.

Digital actions

- **Track key indicators digitally.** Use a spreadsheet or digital log to record practical data such as reused scraps, local materials, repairs completed, packaging reduced, or made-to-order products sold.
- **Communicate sustainable choices online.** Use product pages, social media posts, or customer messages to explain concrete actions, care instructions, repair options, and environmental benefits without vague claims.
- **Share care and repair information digitally.** Prepare downloadable or shareable care cards, repair guides, or instructions to help customers extend the life of the products.

2 — Digital Transformation Basics

Aim	To support artisans, craftspeople, and small business owners in gradually adopting practical, low-cost digital tools that make daily business management more efficient while preserving the value of handmade work.
Key takeaways	Digital transition should be introduced step by step, starting from simple high-impact tasks such as invoices, stock records, bookings, receipts, client orders, file organisation, and payment tracking.

Green actions

- **Reduce paper use in administration.** Replace paper invoices, receipts, stock notebooks, and loose client order forms with digital templates and cloud folders.
- **Organise a zero-paper folder system.** Create master folders for clients, suppliers, invoices, receipts, orders, inventory, tax documents, marketing, and legal documents.
- **Track materials and avoid over-purchasing.** Use a spreadsheet or inventory app to record item name, supplier, quantity, unit cost, reorder threshold, and storage location.
- **Plan production, workshops, and deliveries digitally.** Use digital calendars to schedule appointments, deadlines, workshops, and delivery dates.

Digital actions

- **Organise inventory and business documents digitally.** Use Excel, Google Sheets, Sortly, Zoho Inventory, OneDrive, Google Drive, or Dropbox to record materials, finished products, suppliers, costs, and reorder thresholds.
- **Strengthen digital safety and data protection.** Use a password manager, multi-factor authentication, secure payment apps, and cloud backup.

3 — Digital Finance Fundamentals

Aim	To help artisans, small producers, and micro-entrepreneurs understand and adopt practical digital finance tools for online banking, electronic payments, cash-flow management, cybersecurity, and alternative financing, so they can reduce costs, improve customer service, and protect business data.
Key takeaways	• Digital finance helps artisans manage accounts, payments, budgeting, tax payments, and records without relying only on physical bank branches. • Online banking, Open Banking and PSD2 can connect business accounts to accounting or budgeting tools, reducing manual work and improving cash-flow visibility. • Electronic payment options such as POS, mobile POS, NFC, QR codes, digital wallets and prepaid cards make sales faster, safer and more flexible. • Cybersecurity is part of digital finance: strong passwords, multi-factor authentication, secure Wi-Fi, updated devices and phishing awareness protect business assets and customer data. • Digital budgeting, cash-flow tools and simple investment assessment help artisans make more informed decisions about growth, equipment and innovation.

Green actions

- **Reduce paper-based financial administration.** Use online accounts, digital invoices, electronic receipts and cloud-based records to reduce printing, prevent document loss and simplify bookkeeping.
- **Limit unnecessary travel to bank branches.** Use secure online banking for transfers, bill payments, tax payments and credit enquiries where appropriate.
- **Choose payment tools that match real business needs.** Select POS, mobile POS, QR payments or digital wallets according to sales context, avoiding unnecessary hardware and resource use.
- **Use digital budgeting to reduce wasteful spending.** Track fixed costs, raw material purchases, seasonal cash needs and investment decisions before committing resources.

Digital actions

- **Set up and manage online banking independently.** Use digital identity verification, secure access and clear permissions for accountants or collaborators.
- **Adopt suitable electronic payment methods.** Compare traditional POS, mobile POS, Smart POS, NFC, QR codes, digital wallets and prepaid cards for workshops, fairs and online sales.
- **Protect financial data and customer transactions.** Use unique passwords, password managers, multi-factor authentication, software updates, secure Wi-Fi and phishing checks.
- **Track cash flow with digital tools.** Use cloud accounting or spreadsheets to monitor income, expenses, taxes, available cash and payment deadlines.
- **Assess alternative finance options carefully.** Explore digital lending, crowdfunding or other financing tools only when costs, risks and repayment capacity are clear.

4 — Marketing for Artisans

Aim	To help artisans and craft-based micro-enterprises build clear, credible and manageable marketing through customer understanding, positioning, storytelling, brand coherence, digital touchpoints, sustainability communication and a simple improvement roadmap.
Key takeaways	• Marketing is not constant promotion; it is a practical system that helps customers understand the value, origin and meaning of handmade work. • Artisans should focus on a priority customer segment, a clear positioning statement and a value proposition supported by proof. • Craft storytelling connects maker, process, materials, place, purpose and impact in a way customers can understand and remember. • A recognisable brand needs a simple promise, consistent tone of voice, coherent visual identity and repeated proof points across touchpoints. • Responsible marketing uses specific, evidence-based sustainability and heritage messages, avoiding vague or exaggerated claims. A small KPI dashboard and PDCA cycle help artisans improve visibility, enquiries, conversion, reviews and customer relationships step by step.

Green actions

- **Communicate sustainability with evidence.** Replace vague claims such as “eco-friendly” with specific information on materials, sourcing, waste reduction, durability, repairability or packaging.
- **Use the credible claim check.** Verify every sustainability message through fact, evidence, relevance and careful wording before publishing it.
- **Show durability and repair as customer value.** Explain how products can last longer through care instructions, replaceable components, repair services or aftercare.
- **Highlight local value responsibly.** Describe provenance, heritage, place and traditional techniques accurately, distinguishing documented facts from inspiration or interpretation.
- **Reduce marketing waste.** Focus on a few relevant channels and reusable content pillars rather than producing scattered, short-lived promotional materials.

Digital actions

- **Map the customer journey.** Identify the digital touchpoints used during awareness, interest, consideration, purchase and loyalty, and remove confusing or missing steps.
- **Choose a realistic channel stack.** Maintain one reliable home base, one discovery channel and one relationship channel instead of many inactive profiles.
- **Create content pillars.** Plan posts and product communication around finished work, process, maker and place, materials, proof, care, longevity and invitations to act.
- **Use AI-assisted tools responsibly.** Draft, translate or plan communication with AI support, while checking facts, tone, authenticity, heritage references and sustainability claims.
- **Track practical marketing indicators.** Monitor enquiries, conversion, visits to key pages, meaningful engagement, reviews, repeat customers and time spent per channel.

5 — Sales and Customer Service

Title	Sales and Customer Service
Aim	To help artisans and self-employed makers improve sales and customer service by presenting their work through customer outcomes, setting sustainable prices, attracting and retaining buyers, and building reliable service habits.
Key takeaways	• Customers buy outcomes, not only products. • A strong offer combines the core product, proof, risk reduction, bonuses, and a clear price anchor. • Retention is as important as acquisition. • Excellent service depends on reliability, responsiveness, assurance, empathy, and strong product presentation.

Green actions

- Replace printed catalogues and flyers with email updates, online portfolios, and digital product stories.
- Use sustainable packaging and include a small care card that helps customers keep products longer.
- Promote repair, care, personalisation, or seasonal refresh services to extend product life and reduce waste.
- Build local, repeat-purchase relationships instead of relying only on high-impact, one-off sales events.

Digital actions

- Create a simple customer contact list with names, emails, purchase history, and consent preferences.
- Send short newsletters or updates every 6–8 weeks with new work, process photos, care tips, or seasonal offers.
- Use digital lead magnets such as care guides, behind-the-craft videos, downloadable tips, or online workshop tasters.
- Track NPS, response time, repeat purchase rate, testimonials, and conversion rate in a simple spreadsheet.

6 — Logistics & Short Supply Chains

Title	Logistics and Distribution
Aim	To help artisans and self-employed makers manage logistics as a practical business system: planning and sourcing materials, organising production and delivery, reducing waste and environmental impact, using simple digital tools, and building a reliable logistics roadmap.
Key takeaways	• Logistics means getting the right things to the right place, at the right time, and at the right cost. • The SCOR model helps artisans map Plan, Source, Make, Deliver, and Return processes. • Logistics creates value through packaging, delivery, communication, and reliability. • Short distribution chains can improve margins, customer relationships, and environmental impact.

Green actions

- Reduce packaging waste by using kraft paper, recycled cardboard, paper tape, reusable bags, or right-sized boxes.
- Batch deliveries instead of dispatching every order separately, and offer local collection where possible.

- Prioritise short or local supply chains and replace one imported material with a local alternative.
- Introduce repair, restoration, take-back, or reusable packaging practices to support circular logistics.

Digital actions

- Set up a simple dispatch log with customer name, order details, dispatch date, carrier, tracking code, delivery status, and notes.
- Use Google Sheets or Airtable to track orders, stock levels, reorder needs, and delivery problems.
- Send tracking codes to customers within two hours of dispatch and use templates for common delivery updates.
- Store only necessary customer data, protect it securely, and respect GDPR rules.

7 — Light-Touch Human Resource Management

Title	Human Resource Management
Aim	To help craft businesses and creative micro-enterprises manage people in a simple, practical and inclusive way, by planning workforce needs, defining roles, recruiting and onboarding fairly, organising mentoring and apprenticeship pathways, and supporting staff development.
Key takeaways	Participants learn how to create light-touch HR practices suitable for small workshops: identifying skills needs, clarifying responsibilities, designing inclusive recruitment and onboarding processes, supporting apprentices through mentoring and feedback, and strengthening motivation, wellbeing, retention and collaboration.

Green actions

- Apply frameworks such as GreenComp to identify role-related green skills and support sustainable resource use, waste prevention, circular thinking, environmental responsibility and responsible material choices.
- Integrate sustainability into people management by including greener working competences in role profiles, onboarding and learning plans.
- Train apprentices and staff on responsible material use, waste reduction, safe and efficient work practices, sustainable production choices and environmental standards.

Digital actions

- Use digital tools to support HR and learning in small businesses, such as skills matrices, onboarding checklists, shared folders, short instructional videos, digital portfolios, online communication tools and micro-learning resources.

- Apply frameworks such as DigComp to identify role-related digital skills needs and help staff and apprentices develop competences in digital communication, documentation, customer interaction, information management and problem-solving.

Glossary

Circular economy	An economic approach that keeps materials, products and resources in use for as long as possible through prevention, reuse, repair, refurbishment, recycling and responsible design.
Customer journey	The stages a customer passes through when discovering, evaluating, buying, using and returning to a product or service.
Cybersecurity	The practices and tools used to protect devices, accounts, data, payments and business information from digital risks such as fraud, malware or unauthorised access.
DigComp	The European Digital Competence Framework. It describes the knowledge, skills and attitudes needed to use digital technologies confidently, critically and responsibly in learning, work and everyday life.
Digital competence	The ability to use digital technologies safely, critically and effectively for work, learning, communication, problem-solving and participation in society.
Digital transition	The gradual adoption of digital tools and workflows to improve administration, communication, finance, sales, logistics, learning and customer service.
Digital wallet	An app or digital service that stores payment cards or accounts securely and allows customers to pay electronically, often through a smartphone or wearable device.
Eco-design	Designing products and services to reduce environmental impact, for example through durable materials, repairable parts, low-waste production or reduced packaging.
ESG	Environmental, Social and Governance principles. For artisans, ESG can be understood as a simple way to look at environmental impact, fair and inclusive working practices, and transparent, responsible business management.
European Green Deal	The EU strategy for transforming Europe into a modern, resource-efficient and competitive economy, with climate neutrality, cleaner production and a fair transition as central goals.
GDPR	The EU General Data Protection Regulation, which sets rules for collecting, storing and using personal data responsibly and securely.
Green transition	The shift towards lower-impact production, resource efficiency, cleaner energy, reduced waste and more sustainable business models.
GreenComp	The European sustainability competence framework. It supports learning for sustainability by helping learners develop knowledge, skills and attitudes for responsible, systemic and future-oriented action.

Greenwashing	Using vague, exaggerated or unsupported environmental claims that may mislead customers about the real sustainability of a product or business practice.
KPI	A Key Performance Indicator is a simple measure used to understand whether an action is working, such as enquiries, repeat purchases, waste reduced or delivery delays.
Life cycle	The full journey of a product, from sourcing and production to use, maintenance, repair, reuse, recycling or disposal.
Open Banking	A secure system that allows authorised third-party services to access bank account information or initiate payments with the customer's consent.
PDCA cycle	A simple improvement method: Plan a change, Do it, Check the result, and Act by keeping, adapting or stopping the change.
POS / mPOS	A Point-of-Sale system allows businesses to accept card or electronic payments. A mobile POS is a portable version suitable for markets, fairs and mobile work.
PSD2	The EU Revised Payment Services Directive, which supports secure digital payments, stronger customer authentication and regulated access to payment account data.
Resource efficiency	Using materials, energy, time and money carefully to reduce waste and increase value in business operations.
SDGs	The Sustainable Development Goals are the 17 global goals of the UN 2030 Agenda. In this toolkit, they help connect small business action with wider priorities such as responsible consumption, decent work, climate action and inclusive growth.
Short supply chain	A supply chain with fewer intermediaries and shorter distances, often helping artisans build local relationships, improve traceability and reduce environmental impact.
Storytelling	The structured communication of the maker, process, materials, place, purpose and impact behind a craft product or service.
Supply chain	The network of suppliers, materials, production steps, logistics and delivery processes that bring a product from idea to customer.
Sustainability	The ability to meet current needs while protecting environmental, social and economic resources for the future.
Value proposition	A clear statement explaining what benefit the customer receives, why the offer is different and what proof supports the claim.

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Unit 6 — Logistics & Short Supply Chains

- Supply Chain Council. *SCOR: Supply Chain Operations Reference Model.*
- OECD. *SMEs and entrepreneurship:* resources on SMEs, competitiveness, value chains and sustainable transformation.
- European Commission. *Circular economy action plan:* resources on waste prevention, product life cycles and resource efficiency.

- European Environment Agency. *Transport and environment*: resources on emissions, logistics and sustainable mobility.
- European Commission. *Waste and recycling*: resources on packaging, waste reduction and circular practices.

Unit 7 — Light-Touch Human Resource Management

- European Commission Joint Research Centre. Bianchi, G., Pisiotis, U., & Cabrera Giraldez, M. (2022). *GreenComp: The European sustainability competence framework*. Publications Office of the European Union.
- European Commission Joint Research Centre. Vuorikari, R., Kluzer, S., & Punie, Y. (2022). *DigComp 2.2: The Digital Competence Framework for Citizens*. Publications Office of the European Union.
- European Centre for the Development of Vocational Training. *Apprenticeships and work-based learning*: resources on skills development, mentoring and vocational learning.
- International Labour Organization. *Skills development and lifelong learning*: resources on inclusive skills systems and workplace learning.
- European Commission. *Employment, social affairs and inclusion*: resources on skills, labour market inclusion and adult learning.

The consortium

The ACTIVATE consortium brings together three complementary organisations with experience in vocational education, sustainability, digital learning, entrepreneurship support and community-based innovation. Together, the partners designed the toolkit to help facilitators guide artisans and small creative businesses through practical green and digital transformation, while respecting the identity, time constraints and working realities of craft professionals.

ARTES Italy

ARTES contributes expertise in entrepreneurship support, skills development and international cooperation. Within ACTIVATE, it helps connect the toolkit to the needs of artisans, small organisations and local creative communities seeking practical, accessible paths for innovation.



Social Effect Network Lithuania

Social Effect Network brings experience in sustainability, social innovation and competence-based approaches. Its role supports the green transition dimension of the project, helping facilitators translate sustainability concepts into concrete actions for craft-based micro-enterprises.



NIKANOR Bulgaria

NIKANOR contributes expertise in digital learning, adult education and training methodologies. Its work strengthens the digital transformation dimension of ACTIVATE, supporting accessible learning formats and practical digital upskilling for artisans and facilitators.



SCORING GUIDE & “WHERE TO START” RECOMMENDATION LOGIC

Purpose

Use this guide after the Sustainability and Digital Readiness Self-Assessments. It converts the two sets of results into a simple 1–5 combined score for each Roadmap work area and recommends where the artisan should start. The aim is not to pass or fail the learner, but to identify 2–3 realistic priority areas for action.

1. Common 1–5 scale

Both assessments use the same 1–5 scale so that Sustainability and Digital Readiness can be compared directly.

Score	Meaning
1	Not at all true for me - I have not started this yet.
2	Slightly true - I am aware of it, but use it rarely or inconsistently.
3	Partly true - I use it sometimes or only for part of my work.
4	Mostly true - I use it regularly and it works for most of my needs.
5	Completely true - it is embedded in my normal way of working.

2. Calculate a score for each work area

- Sustainability score (1–5): if the Sustainability Self-Assessment contains two statements for one work area, add the two scores and divide by 2. If the final version uses one statement per work area, use that score directly.
- Digital score (1–5): use the Digital Readiness score for the corresponding Roadmap work area. In the digital tool, Questions 1–7 map directly to M1–M7.
- Combined Readiness Score (1–5): add the Sustainability score and Digital score for the same work area, then divide by 2. Round to one decimal place if needed.

Example	Sustainability	Digital	Combined
M3 Marketing	2.5	4.0	$(2.5 + 4.0) \div 2 = 3.3$

3. Interpret the combined score

Combined score	Flag	Meaning	Recommended response
1.0–2.0	START HERE	This work area has a clear readiness gap.	Include it among the first priorities. Choose one manageable 30-day action.
2.1–3.5	DEVELOPING	Some good practices exist, but they are not yet consistent or balanced.	Select a targeted improvement, especially in the weaker of the two dimensions.
3.6–5.0	READY	This area is functioning well.	Maintain the practice and choose an advanced green or digital upgrade only if it supports a real business goal.

4. “Where to Start” recommendation logic

The recommendation should point the artisan toward 2–3 priority work areas, not force them to complete all seven modules. Apply the sequence below.

Step 1 - Find the lowest combined score

The work area with the lowest Combined Readiness Score becomes the first suggested starting point.

Step 2 - Check for a hidden one-dimension gap

If either the Sustainability or Digital score in any area is 1 or 2, flag that area even if the combined average looks moderate. A strong green score should not hide a serious digital gap, and vice versa.

Step 3 - Add the next-lowest area

Choose the second-lowest combined score, unless another area is more urgent for current orders, cash flow, customer relationships, compliance or business continuity.

Step 4 - Let the artisan choose the third priority

The third priority should be strategically important and realistic. Motivation matters: three areas worked on seriously are better than seven areas started and abandoned.

Step 5 - Apply the digital safety override

If the cross-cutting Digital Safety score is 1 or 2, add one basic safety action to the 30-day plan regardless of module ranking.

Step 6 - If all scores are strong

Do not invent a weakness. Choose the area with the biggest opportunity for innovation, the largest green–digital imbalance, or the strongest link to the artisan’s next 12-month goal.

Tie-break rule

When two areas have the same combined score, prioritise: (1) the area with the lower single-dimension score, then (2) the area the artisan says feels most urgent, then (3) the area where a useful action can start within 7 days.

5. Recommendation wording for the learner

*“Your results suggest starting with **[Priority 1]** and **[Priority 2]**. These are the areas where a focused change is most likely to help. Your third priority is your choice: select the area that matters most to your business right now and that you feel ready to work on.”*

DIGITAL READINESS SELF-ASSESSMENT TOOL

Purpose of this Self-Assessment

Digital tools can help artisans save time, organize business information, communicate with customers and suppliers, increase visibility, learn new skills and make everyday work more resilient. This self-assessment helps you identify where digital solutions already support your craft business and where one simple improvement could make the biggest difference.

The assessment is not a test. Answer based on what you do today. The first seven statements correspond directly to the seven ACTIVATE Roadmap work areas. The final statement is a cross-cutting digital safety check that applies to every area.

Instructions

Read each statement carefully and rate how accurately it describes your current practice. Use the same 1–5 scale as the Sustainability Self-Assessment so that the two dimensions can be compared and combined.

Score	Meaning
1	Not at all true for me - I have not started this yet.
2	Slightly true - I am aware of it but use it rarely or inconsistently.
3	Partly true - I use it sometimes or only for part of my work.
4	Mostly true - I use it regularly and it works for most of my needs.
5	Completely true - it is embedded in my normal way of working.

Your Digital Readiness — 8 Questions

1. M1 — Business Administration & Accounting

I use a simple digital system to record and find essential business information — such as sales, expenses, stock, invoices or important documents — without relying only on paper or memory.

My score: 1 2 3 4
5
(circle one)

2. M2 — Billing, Pricing & Customer Management

I use at least one digital solution consistently to manage invoicing, payments, pricing information or customer records.

My score: 1 2 3 4
5
(circle one)

3. M3 — Marketing, Communication & Visibility

I maintain at least one digital channel where customers can find current information about my work, and I update or use it regularly.

My score: 1 2 3 4
5
(circle one)

4. M4 — Production & Materials Management

I use a digital tool, file or simple record to support production planning, materials or stock tracking, quality control, or waste/resource monitoring.

My score: 1 2 3 4
5
(circle one)

5. M5 — Supply Chain & Partnerships

I use digital tools to communicate with suppliers or partners, compare options, track orders or deliveries, or find new collaborators and opportunities.

My score: 1 2 3 4
5
(circle one)

6. M6 — Sales & Customer Service

Customers can use at least one digital channel to contact me, place an order, pay, receive updates or give feedback, and I can follow the interaction without losing information.

My score: 1 2 3 4
5
(circle one)

7. M7 — Continuous Learning & Skills Development

I regularly use digital resources — such as tutorials, online courses, peer groups, webinars or AI-assisted tools — to learn, solve a work problem or try a useful new skill.

My score: 1 2 3 4
5
(circle one)

8. Cross-cutting — Digital Safety & Resilience

I protect my business accounts and information with basic digital safety habits, such as strong unique passwords, two-factor authentication where available, safe backups/cloud storage, and caution with suspicious links or requests.

My score: 1 2 3 4
5
(circle one)

Calculate Your Digital Readiness

Transfer the seven Roadmap work-area scores below. These are the scores that carry into the ACTIVATE Personal Roadmap Workbook.

Module	Work area	Digital score (1–5)
M1	Business Administration & Accounting	_____
M2	Billing, Pricing & Customer Management	_____
M3	Marketing, Communication & Visibility	_____
M4	Production & Materials Management	_____
M5	Supply Chain & Partnerships	_____
M6	Sales & Customer Service	_____
M7	Continuous Learning & Skills Development	_____

Roadmap Digital Average = add M1–M7 scores and divide by 7: _____ / 5

Digital Safety score (Question 8): _____ / 5

Safety

override

If your Digital Safety score is 1 or 2, add one basic safety action to your 30-day plan even if your other digital scores are strong. A preventable data or account problem can disrupt every other business area.

Understanding Your Result

Average score	Readiness	What it means
1.0–2.0	START HERE / BEGINNER	Digital tools are limited or inconsistent. Choose one simple tool or habit that removes a real frustration in your work.
2.1–3.5	DEVELOPING	You already use some useful digital solutions. Focus on making them consistent, connected and easier to maintain.
3.6–5.0	READY / ADVANCED	Digital practices are well integrated. Focus on stronger systems,

Average score	Readiness	What it means
		automation, data use, e-commerce, collaboration or innovation where they add real value.

My Digital Readiness Summary

My strongest digital work area is: _____

The digital work area where I need the most support is: _____

The one digital improvement that would save me the most time or effort is: _____

My Digital Safety score is: _____ / 5

One digital action I will start within the next 30 days: _____

SUSTAINABILITY SELF-ASSESSMENT TOOL

Based on GreenComp — EU Green Competence Framework

Purpose of this Self-Assessment

Sustainability is becoming an essential part of everyday work for artisans, craftspeople and self-employed workers. Consumers increasingly seek products that are made responsibly, sourced locally and designed to last. At the same time, EU policy — including the Green Deal and the European Pillar of Social Rights — is creating both opportunities and expectations for small businesses to operate more sustainably.

This self-assessment has been designed to help you understand your current level of sustainability readiness across the seven key areas of your craft business. It covers environmental awareness, responsible sourcing, waste reduction, sustainable communication and more.

The assessment is not a test. There are no right or wrong answers. Its purpose is to give you an honest picture of where you are now — and to help you decide where to focus your energy next.

Once completed, you will have an overview of your sustainability readiness level and a clear indication of which ACTIVATE modules are most relevant to your current situation.

About GreenComp

GreenComp is the European Green Competence Framework developed by the European Commission's Joint Research Centre. It defines the knowledge, skills and attitudes needed to live, work and contribute to a sustainable society. It is organised around four areas: *Embodying sustainability values*, *Embracing complexity*, *Envisioning sustainable futures*, and *Acting for sustainability*. Each statement in this assessment is linked to one or more GreenComp competences, shown in brackets.

Instructions

Read each statement carefully and rate how accurately it describes your current situation. Answer based on what you actually do right now — not what you think you should do.

Use the following scale:

Score	Meaning
1	Not at all true for me — I have not considered or started this
2	Slightly true for me — I am aware of this but rarely act on it
3	Partly true for me — I do this occasionally or in some areas
4	Mostly true for me — I do this regularly in most areas of my work
5	Completely true for me — This is fully embedded in how I work

Business Administration & Accounting

I record my income, expenses and materials use in a way that allows me to track my environmental costs — such as energy, water and waste — alongside financial ones.

Score: _____

I have identified which of my regular business activities (transport, energy use, packaging, material sourcing) have the largest environmental footprint.

Score: _____

Billing, Pricing & Customer Management

My prices reflect the true cost of my materials and production process — including the value of sustainable sourcing, ethical labour and quality that lasts.

Score: _____

I communicate honestly with customers about the environmental and social choices embedded in my pricing — why my work costs what it costs.

Score: _____

Marketing, Communication & Visibility

I communicate the sustainability story of my work — the materials I use, where they come from, why I chose them — as part of how I present and promote what I make.

Score: _____

I use my marketing channels to raise awareness of sustainable consumption — encouraging customers to value quality, longevity and responsible production over low price.

Score: _____

Production & Materials Management

I actively seek out sustainable, recycled or locally sourced materials as a first choice in my production process — not just when they are convenient or cheaper.

Score: _____

I have a system in my workshop for reducing, reusing or properly disposing of production waste — offcuts, chemicals, packaging and by-products.

Score: _____

Supply Chain & Partnerships

I consider the environmental impact of my supply chain — including the distance my materials travel, the transport mode used and the sustainability practices of my suppliers.

Score: _____

I prefer to work with local suppliers and collaborators when possible, shortening my supply chain and reducing transport-related emissions.

Score: _____

Sales & Customer Service

I provide customers with clear guidance on how to care for, repair or responsibly dispose of my products — helping them extend the product's lifespan.

Score: _____

When a customer raises a concern about sustainability — materials, packaging, production methods — I can respond confidently and honestly.

Score: _____

Continuous Learning & Skills Development

I regularly seek out learning opportunities related to sustainability — online courses, workshops, community events, peer exchange or professional reading.

Score: _____

I feel confident discussing sustainability topics — the circular economy, the EU Green Deal, responsible sourcing — with customers, peers and partners.

Score: _____

Calculate Your Score

Add together all your scores.

Total Score: _____ / 70

Understanding Your Results

14 – 28 points - Beginner

You are at the beginning of your sustainability journey. Sustainable practices may not yet be part of your regular work — and that is completely normal. Many artisans start here.

The most important step is awareness: understanding which of your daily activities have the biggest environmental impact and identifying one or two concrete changes you can make immediately.

Recommended starting modules:

- Business Administration & Accounting
- Production & Materials Management

29 – 49 points - Developing

You already apply some sustainable practices in your work, but there is significant potential to go further. You may be strong in one or two areas while others remain less developed.

Focus on connecting your existing good practices into a more deliberate approach — communicating your sustainability story, strengthening your supply chain choices and building sustainability into your pricing and customer relationships.

Recommended starting modules:

- Marketing, Communication & Visibility
- Supply Chain & Partnerships
- Sales & Customer Service

50 – 70 points - Advanced

Sustainability is already well integrated into how you work. You understand the connection between your craft and the broader environmental and social context.

You are ready to go deeper — exploring circular economy models, sharing your knowledge with peers, advocating for sustainable practices in your sector and engaging with EU Green Deal opportunities relevant to your business.

Recommended starting modules:

- Continuous Learning & Skills Development
- Billing, Pricing & Customer Management

My Sustainability Summary

The areas where I feel most confident:

The areas where I would like to improve most:

Based on my results, I will focus first on:

One green action I will take in the next 30 days:

Take the results of this assessment to your ACTIVATE trainer or use them to complete the relevant action sheets in the ACTIVATE Business Toolkit.

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My results at a glance: planning my improvement process

Copy your sustainability and digital scores into the table, calculate the average score for each work area, and use the results to choose which areas you want to improve first.

For each work area, calculate the combined average and use the “Where to Start” logic to see which areas need attention first.

Assign them a priority and then choose 2–3 work areas to take forward into Section 2 – My Priority Areas and use them to plan your Personal Roadmap.

How to choose your priorities

Priority 1 should normally be the area with the lowest combined average. Priority 2 can be the next-lowest score or an area with a serious gap in only one dimension. Priority 3 should be strategically important and realistic to tackle in the short term. You can adjust the recommendation if your business context gives you a clear reason.

Work Area (Roadmap Module)	Sustainability Score 1–5	Digital Score 1–5	Combined Average	Level	Suggested priority
M1 — Business Administration & Accounting	_____	_____	_____	Start / Develop / Ready	☐
M2 — Billing, Pricing & Customer Management	_____	_____	_____	Start / Develop / Ready	☐
M3 — Marketing, Communication & Visibility	_____	_____	_____	Start / Develop / Ready	☐
M4 — Production & Materials Management	_____	_____	_____	Start / Develop / Ready	☐
M5 — Supply Chain & Partnerships	_____	_____	_____	Start / Develop / Ready	☐
M6 — Sales & Customer Service	_____	_____	_____	Start / Develop / Ready	☐
M7 — Continuous Learning & Skills Development	_____	_____	_____	Start / Develop / Ready	☐

1.0–2.0 Urgent, start from these topics 1. --- 2.	2.1–4 Next to be improved 1. --- 2.	4–5.0 Completed or low priority. 1. --- 2.
--	--	---

My strongest work area: _____

My biggest sustainability gap: _____

My biggest digital gap: _____

The area that feels most urgent for my business right now: _____

The ONE action I want to start first: _____

The work area where I most need support: _____

Based on those elements, I decide to add to my PERSONAL ROADMAP the following competences:

1. _____
2. _____
3. _____

MY PERSONAL ROADMAP WORKBOOK

A Sprint Planner for Sustainable and Digital Transformation

My Profile

Name: _____

Profession / craft: _____

Workbook started: _____

3-month review date: _____

12-month review date: _____

Purpose of this Workbook

Completing a self-assessment shows you where you stand. This workbook turns that picture into a plan.

It is built around 3 sprints — short, focused bursts of action — that build on each other. Each sprint you complete feeds directly into the next one. Start with Sprint 1. Review it. Then plan Sprint 2.

There are no perfect plans. The goal is a roadmap that is honest, realistic and yours.

How the sprints connect

SPRINT 1 30 Days Quick wins One action per priority		SPRINT 2 90 Days Build habits Sustained changes		SPRINT 3 12 Months Structural change Big goals
---	--	---	--	--

Each completed sprint feeds the next. Sprint 2 is planned from Sprint 1 lessons. Sprint 3 goals emerge from Sprint 2 habits. The milestone checklist at the end of each sprint confirms you are ready to move forward.

SECTION 1 — MY SELF-ASSESSMENT RESULTS

Transfer your scores from the Sustainability and Digital Readiness Self-Assessments. Calculate the combined average per module.

Work Area (Roadmap Module)	Sustainability Score (1–5)	Digital Score (1–5)	Combined Average
M1 — Business Administration & Accounting	_____	_____	_____
M2 — Billing, Pricing & Customer Management	_____	_____	_____
M3 — Marketing, Communication & Visibility	_____	_____	_____
M4 — Production & Materials Management	_____	_____	_____
M5 — Supply Chain & Partnerships	_____	_____	_____
M6 — Sales & Customer Service	_____	_____	_____
M7 — Continuous Learning & Skills Development	_____	_____	_____
OVERALL AVERAGE	_____	_____	_____

Reflection

Which module received my highest combined score?

Which module received my lowest combined score?

Which module feels most urgent for my business?

What one pattern do I notice across all my scores?

SECTION 2 — MY PRIORITY AREAS

Choose the three modules you will focus on across all three sprints. Every sprint action connects back to one of them.

How to choose:

- Start with your lowest combined score — greatest potential.
- Add the module most strategically important for your business.
- Add a third you feel ready and motivated to tackle.
- Three done well beats seven started.

Priority	Why this is important for me
Priority 1 ★	
Priority 2 ★	
Priority 3 ★	

SECTION 3 — SPRINT 1: QUICK WINS (30 days)

Choose one concrete action per priority area. Must be completable within 30 days using resources you already have.

Sprint 1 rule:

Every action must pass: 'Can I start this in 7 days without anything I do not already have?'

If no — simplify until yes.

Sprint 1 — Action 1 (Priority Area 1)

The module / area I am working on:	
The specific action I will take:	
Green ☐ Digital ☐ Both ☐	<i>Tick which dimension this addresses</i>
I will complete this by:	(date)
I will know it worked when:	

Sprint 1 — Action 2 (Priority Area 2)

The module / area I am working on:	
The specific action I will take:	
Green ☐ Digital ☐ Both ☐	<i>Tick which dimension this addresses</i>
I will complete this by:	(date)
I will know it worked when:	

Sprint 1 — Action 3 (Priority Area 3)

The module / area I am working on:	
The specific action I will take:	
Green ☐ Digital ☐ Both ☐	<i>Tick which dimension this addresses</i>

I will complete this by:	(date) _____
I will know it worked when:	_____ _____

Sprint 1 — Milestone Checklist

Tick each milestone when achieved. All four must be complete before starting Sprint 2.

- ☐ I completed Action 1 and can describe one concrete result it produced.
- ☐ I completed Action 2 and can describe one concrete result it produced.
- ☐ I completed Action 3 and can describe one concrete result it produced.
- ☐ I have written my Sprint 1 lessons learned below.

Sprint 1 Review — Lessons Learned

What worked better than expected?

What was harder than expected?

What will I do differently in Sprint 2?

What new opportunity did I notice?

Sprint 1 → Sprint 2 Bridge

Transfer the most important lesson from each action into Sprint 2 planning.

Your lessons are the raw material for Sprint 2. Do not skip this step.

SECTION 4 — SPRINT 2: BUILD HABITS (90 days)

Sprint 2 builds on Sprint 1. Choose three actions requiring sustained effort over 90 days. At least one must become a repeatable habit or system.

Sprint 2 rule:

Each action should be done regularly — not just once.

A weekly or monthly habit that runs on autopilot is more valuable than a one-off project.

Sprint 2 — Action 1 (Priority Area 1 | Building on S1 lesson: _____)

The module / area I am working on:	_____
The habit or action I will build:	_____
Green ☐ Digital ☐ Both ☐	<i>Tick which dimension this addresses</i>
Frequency / rhythm:	<i>e.g. weekly, monthly, every season</i>
I will review this by:	(date) _____
I will know it is a habit when:	_____

Sprint 2 — Action 2 (Priority Area 2 | Building on S1 lesson: _____)

The module / area I am working on:	_____
The habit or action I will build:	_____
Green ☐ Digital ☐ Both ☐	<i>Tick which dimension this addresses</i>
Frequency / rhythm:	<i>e.g. weekly, monthly, every season</i>
I will review this by:	(date) _____
I will know it is a habit when:	_____

Sprint 2 — Action 3 (Priority Area 3 | Building on S1 lesson: _____)

The module / area I am working on:	_____
---	-------

The habit or action I will build:	_____
Green ☐ Digital ☐ Both ☐	<i>Tick which dimension this addresses</i>
Frequency / rhythm:	<i>e.g. weekly, monthly, every season</i>
I will review this by:	<i>(date)</i> _____
I will know it is a habit when:	_____

Sprint 2 — Milestone Checklist

Tick each milestone when achieved. All five must be complete before planning Sprint 3.

- ☐ I completed or established Habit/Action 1 and can show evidence.
- ☐ I completed or established Habit/Action 2 and can show evidence.
- ☐ I completed or established Habit/Action 3 and can show evidence.
- ☐ I can describe at least one measurable improvement in my business.
- ☐ I have identified my Sprint 3 structural goal (see Section 5).

Sprint 2 Review — Lessons Learned

Which habit stuck most naturally — and why?

Which action required the most effort?

What has visibly changed in my business since Sprint 1?

What structural change is now within reach for Sprint 3?

Sprint 2 → Sprint 3 Bridge

You have built at least three working habits. Sprint 3 uses that foundation for one bigger structural change.

Update the Gantt chart in Section 6 — mark what you completed and set Sprint 3 milestone dates.

SECTION 5 — SPRINT 3: STRUCTURAL CHANGE (12 months)

Sprint 3 is your big-picture goal — ambitious but grounded in everything Sprints 1 and 2 proved possible. One structural goal for green. One for digital.

Sprint 3 rule:

A structural change is one that would still be in place even if you were away for a month.

Examples: a sustainable materials policy, a new pricing model, an e-commerce channel, a customer communication system.

Sprint 3 — Green Structural Goal (12 months)

My green structural goal:	<i>e.g. Switch 80% of materials to local sources</i>
Why does this matter for my business:	
Built on Sprint 1 lesson:	
Built on Sprint 2 habit:	
I will know I have achieved this when:	

Sprint 3 — Digital Structural Goal (12 months)

My digital structural goal:	<i>e.g. Set up and maintain one active e-commerce channel</i>
Why does this matter for my business:	
Built on Sprint 1 lesson:	
Built on Sprint 2 habit:	
I will know I have achieved this when:	

Sprint 3 — Milestone Checklist

Your 12-month proof of transformation.

- ☐ My green structural goal is fully operational and self-sustaining.
- ☐ My digital structural goal is fully operational and self-sustaining.
- ☐ I can describe a measurable improvement in my business competitiveness.
- ☐ I have shared at least one change with a peer, community or professional network.
- ☐ I have identified my next goal — beyond this workbook.

SECTION 6 — MY ROADMAP GANTT CHART (12 months)

Plot all sprint actions across a 12-month timeline. Shade cells when each action is active. Mark milestone months with ★.

How to use this chart:

- Write a short label in the 'Action' column (e.g. 'S1-A1: Packaging switch').
- Shade or mark ✓ the months when this action is active.
- Mark milestone months with ★.
- Sprint 1: Month 1 only. Sprint 2: Months 2–3. Sprint 3: spans all 12 months.

S pr in t	Action / Goal				SPRIN T 2 (M2–3)						SPRIN T 3 (M1– 12)		
#	Action / Goal	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
S 1	Sprint 1: Green Action												
S 1	Sprint 1: Digital Action												
S 1	Sprint 1: Priority 3 Action												
★	SPRINT 1 MILESTONE	★											
S 2	Sprint 2: Green Habit												
S 2	Sprint 2: Digital Habit												
S 2	Sprint 2: Priority 3 Habit												
★	SPRINT 2 MILESTONE			★									
S 3	Sprint 3: Green Structural Goal												
S 3	Sprint 3: Digital Structural Goal												
★	SPRINT 3 MILESTONE												★
	My own action:												
	My own action:												

Shade = action active this month · ★ = milestone reached · Fill in with a pen after printing.

SECTION 7 — MY 12-MONTH COMMITMENT

Summarise your full roadmap here. Return to this card at each sprint review.

Sprint 1 priority action (30 days):	
Sprint 2 habit to build (90 days):	
Green structural goal (12 months):	
Digital structural goal (12 months):	

Target Sprint 3 completion date: _____

Name: _____

Signature: _____

Date: _____

SECTION 8 — FOLLOW-UP REFLECTION (complete after 12 months)

Return after completing all three sprints. Answer honestly — the goal is to learn, not to report success.

Which sprint action produced the most visible change in my business?

What was the hardest habit to sustain — and why?

What positive results did I not expect?

What surprised me most during this process?

What milestone am I most proud of?

What will be my next goal — beyond this workbook?

MY PERSONAL COMMITMENT STATEMENT

I understand that sustainable and digital transformation is an ongoing process. By completing this workbook, I commit to continuously improving my skills, practices and professional activities in ways that contribute to a more sustainable, innovative and competitive future.

Name: _____

Date: _____

Signature: _____

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