Personal Business Model Canvas Catalogue

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Personal Business Model Canvas

Automation Engineer

Author: Clio Dosi, Roberta Lozzi, Matteo Vignoli (UNIBO)

Automation Engineer | Personal Service Model

Who Helps You

Interdisciplinary Team (e.g. mechanics, electronics and computer scientists) or automation engineers team

Project manager

Business units

Plant Industrialization teams

What You Do

The Automation Engineer designs, tests, implements, and operationally manages industrial automation systems

Who You Are

The Automation Engineer is characterized by interdisciplinary knowledge in the areas of robotics, mechanics, the digital technologies that are pervading modern industry, electronics and electrical engineering

Benefits You Offer

The Automation Engineer analytically understand a problem, identify the technology to solve it and implement it

She is able to take a top-down view and act as the glue between all the various technologies

Diagnostics: being able to show where the problem is even to people who are not experts in the field

Roles/Relationships

All details are agreed upon hand by hand with the customer, often with the filter of the commercial

Who You Deliver

The Automation Engineer does not come into direct contact with customers the sales engineer

Who You Help
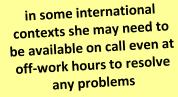
Industrial contexts, Automotive Critical Situations and Security Management

Public administration Home Automation Healthcare

Packaging and logistics Infrastructure and transport, utility networks (water, electricity and gas),

Costs and Consequences
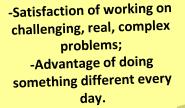
in some international contexts she may need to be available on call even at off-work hours to resolve any problems

it is necessary to stay up-to-date with new technologies

Compensation and Rewards

-Satisfaction of working on challenging, real, complex problems;
-Advantage of doing something different every day.

It can range from 23-25,000 euros for a new graduate

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Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities
Who you are

The Automation Engineer is characterized by **interdisciplinary knowledge** in the areas of **robotics**, **mechanics**, the **digital technologies** that are pervading modern industry, **electronics** and **electrical engineering**, and is able to **conceive, design, implement and commission automation systems for machines, processes, plants, products and services**.

The Automation Engineer is therefore equipped with specific skills that allow her to fit readily into work areas also very different, operating as a **systems engineer** and / or **designer** and / or **technical in** any application context in which the technologies and principles of automation play a major role.

The figure of the Automation Engineer is that of an **expert in processing and control systems**. The Automation Engineer works in the design, management and implementation of acquisition, processing, real-time control, distributed management and process automation systems, typical of computer-based automation systems (PLC).

The figure is characterized by **skills in terms of understanding and modeling the dynamics of complex systems and for the development of algorithms and real-time software for their supervision and automation.** The function of the Automation Engineer is also strongly oriented to the **integration of** different **computer and electronic technologies**, functional to the automation of large and small industrial plants.

Skills, abilities
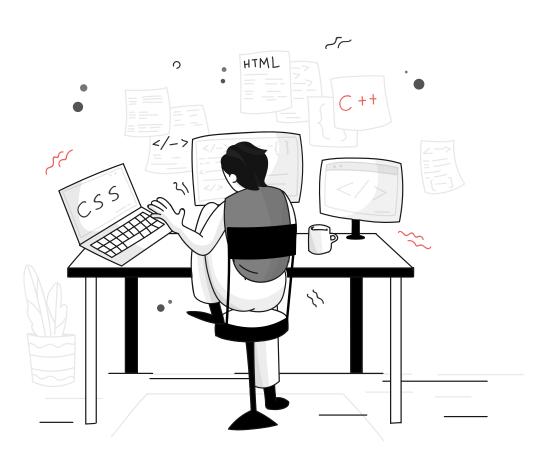## Who you are

Hard Skills:
- Bachelor's degree in Automation Engineering or related disciplines such as Mechanical Engineering, Electrical Engineering, Computer Engineering, Telecommunications Engineering;
- Extensive knowledge of industrial automation and robotics;
- Knowledge of control laws and algorithms;
- Proficiency in programming in structured parogramming languages (e.g., C, C++, Python) and PLC programming languages;
- Knowledge of PLC and robot software development tools;
- Integration of artificial intelligence;
- Mathematical control, systems theory, system identification, distributed control;
- Software versioning tools (e.g. GIT, SVN);
- Knowledge and application of the laws of mechanics: meaning of transmission of motion, gearing, motion;
- Model Based Design.

Soft Skills:
- Analytical thinking;
- Prepared not to stop at the first obstacle: perseverance, changing paths changing perspective;
- Problem Solving Skills;
- Ability to organize and work independently;
- Ability to work in an interdisciplinary team (e.g., mechanical field);
- Propensity for constant updating;
- Strong goal orientation;
- Good knowledge of the English language;
- Ability to progress documented and clear progress.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

The Automation Engineer designs, tests, implements, and operationally manages industrial automation systems. Control and automation engineering uses technological knowledge from multiple engineering disciplines (mechanical, electrical, electrical engineering, digital technologies) to implement automated machines, systems, and processes. **The primary responsibility is the design of software, which is often linked to hardware, which is why interdisciplinarity is critical.**

Responsabilities

Depending on the application contexts, the main duties of an Automation Engineer may be:
- Design of the software and/or electrical part of automated systems;
- Requirements analysis and system study: possible criticalities, interactions between systems;
- Maintenance of automation systems;
- Design of control logic and algorithms for automated processes and systems;

- Development of the machine software in parallel with the development of the hardware part, based on a model of the machine so that the software is ready when the machine arrives;
- Production line Integration;
- Collaboration in interdisciplinary team to create prototypes;
- Performing tests, simulations, and system integrations;
- Interpretation and processing of test data to correct malfunctions and bugs, to prove a solution, or to make improvements;
- How to interconnect automation (IoT) systems;
- Communicate information for the development of related technical documentation;
- Identify automation opportunities within work processes and scale technology across multiple domains;
- Security measure planning and design;
- Teamwork on human machine interface design;
- Digital twin and virtual commissioning;
- Accountability over control logic: attention to detail and prediction and monitoring of consequences.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (project leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

Industrial contexts

Automation is used to create automatic machines or robots or components that, thanks to electrical drives, electromechanical processes and control systems, are able to carry out simple and repetitive actions accurately, with the need for minimal human control. This frees workers and employees from tasks with little added value, so they can focus on other activities.

Critical Situations and Security Management

Then there are automated machines that are used to perform tasks that require precision, power or speed that cannot be achieved by a human being, even in conditions that are dangerous or prohibitive for humans, for example due to harmful or hazardous substances for the operator.

Automotive

Development of microcomputers and electronic systems that enable automatic regulation of vehicle performance and safety.

Home Automation

Design of "smart home" that is an environment - properly designed and technologically equipped - which provides the user with facilities that go beyond the "traditional", where equipment and systems are able to perform functions partially autonomous.

Healthcare

Thanks to robotic technologies, complex surgical procedures and more can be performed.

Packaging and logistics

Sector of companies manufacturing automatic machines for packaging and warehouse automation.

Infrastructure and transport, utility networks (water, electricity and gas), public administration

Smart grid, energy distribution networks, utilities

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

It is possible to imagine mechanics integrated with electronics as the "body," while automation and thus the automation engineer as the "brain" of a machine.
The main benefits offered by the automation engineer are:

- Analytically understand a problem, identify the technology needed to solve that problem, and bring the technology to life by implementing the desired logic and behavior of the technology;

- Compared to other types of engineers, the automation engineer is able to take a top-down view and act as the glue between all the various technologies and make them work together to solve a problem;

- Diagnostics: being able to show where the problem is even to people who are not experts in the field;

- Automated maintenance management on machines, predictive maintenance study on machines and data analysis result in optimized production time, reduced downtime, reduced damage and unplanned stops;

- Thanks to the intervention of industrial automation, they can be done more quickly and safely:
  o repetitive actions, which in this way can be carried out precisely, economically and without the interruptions necessary for human action, which in turn can thus be limited to a general control of the process;
  o Actions that require precision, power, or speed that cannot be achieved by humans;
  o actions under dangerous or prohibitive conditions.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
    1. How will potential Customers discover how you can help them?
    2. How will they decide whether to buy your service?
    3. How will they buy it?
    4. How will you deliver what Customers buy?
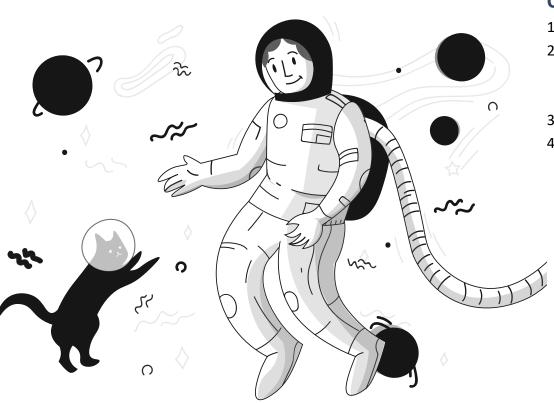   5. How will you follow up to make sure Customers are happy?

Channels
How you deliver

- The Automation Engineer does not come into direct contact with customers, it is the sales engineer (e.g. management or mechanical engineer specializing in maintaining relations with customers) who maintains relations with the customer trying to sell, maintain contact with the customer especially if it is a large customer;

- If the reference company is a large company, it is often contacted directly by customers, in the case of smaller, but also larger companies, trade fairs are a very important channel both to maintain contact with customers, through the figures of sales or project managers, and to show the operation of the machines through the figures of specialized technicians or technical engineers;

- The salesperson is always a filter between the Automation Engineer and the customer. It can also happen that the two technicians from the supplier and the distributor get in touch to deal directly with technical aspects and any problems, even urgent ones, thus speeding up the process without going through the salesperson;

- As these are often multi-million dollar contracts, it is essential to ensure that the machine goes well through a series of tests and offer an after-sales service to ensure customer satisfaction by offering a machine that goes well.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" - written communication (e.g. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

The Automation Engineer may be tasked with identifying new application and development opportunities for automation within existing industrial plants and processes

All details are agreed upon hand by hand with the customer, often with the filter of the commercial, to agree on the specifics of the final request.

It is important to know the technologies that exist in the world in order to understand the competitors, even at the level of existing technologies, to be able to respond to the customer's requests and to be able to offer the best technology for the specific case.

The client in some cases may want software or components because they cost less or because employees already know how to use them, so it is necessary to be able to assess the specific case.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - ADVICE,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

The main partners the Automation Engineer works with are:

- Project manager: manages all activities and their synchronization;

- Interdisciplinary team, such as mechanics, electronics, and computer scientists, to understand all facets of the system to be implemented;

- Team of automation engineers, useful for going into detail such as developing new logic or solving a problem;

- She can also work with different business units (Engineering, Manufacturing, Planning & Procurement, Logistics) to identify where and how automation can help improve workflow and optimize manufacturing processes;

- She will work with Plant Industrialization teams in the development of continuous improvement projects (PLC Software Improvement).

Revenue and benefits

Revenue and Benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Remuneration

The salary to which an Automation Engineer can aspire is generally higher than the average salary in Italy. It can range from **23-25,000 euros** for a **new graduate** at his or her first work experience to over **50,000 euros** for a **senior** figure, passing through an **average of** around **35-38,000 euros per year**.

The salary estimated by **Technical Hunters** ranges **from 45,000 to 60,000 euros gross per year**, with room for growth after the first few years of experience.

There are, however, **figures of particular responsibility** and experience, especially in the most advanced industry and in large groups, who can earn even higher salaries, up to **90,000 euros** per year.

Soft benefits

- Satisfaction of working on challenging, real, complex problems and being able to solve them;
- Advantage of doing something different every day: great variety of work that often changes by its very nature.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

- Since technology in this field is constantly evolving, it is necessary to stay up-to-date with new technologies, either independently or within your own work environment;

- Dealing with so many different problems and processes from different worlds can make it difficult to specialize; it is also very challenging but requires a lot of adaptability;

- Automation companies are often huge groups and it is difficult to orient oneself within such a wide world. It is necessary to understand one's own role and that of others in order to coordinate with them;

- If the Automation Engineer works in some international contexts she may need to be available on call even at off-work hours to resolve any problems or malfunctions of customers remotely;

Golden Reads

	5 GOLDEN READS FOR AUTOMATION ENGINEER	LINK AMAZON
#1	Humble, J., & Farley, D. (2010). *Continuous delivery: reliable software releases through build, test, and deployment automation.* Pearson Education.	https://www.amazon.com/Continuous-Delivery-Deployment-Automation-Addison-Wesley/dp/0321601912
#2	Martin, R. C. (2009). *Clean code: a handbook of agile software craftsmanship*. Pearson Education.	https://www.amazon.com/Clean-Code-Handbook-Software-Craftsmanship/dp/0132350882
#3	Taulli, T. (2020). *The Robotic Process Automation Handbook.* Apress.	https://www.amazon.com/Robotic-Process-Automation-Handbook-Implementing/dp/1484257286
#4	Clark, N. (2018). *PLC Programming Using RSLogix 500: A Practical Guide to Ladder Logic and the RSLogix 500 Environment.* Independently published.	https://www.amazon.com/PLC-Programming-Using-RSLogix-500-ebook/dp/B07JLSHPK3
#5	Liu, H., Liu, D., Wan, Y., & Lewis, F. L. (2022). *Robust Formation Control for Multiple Unmanned Aerial Vehicles.* CRC Press.	https://www.amazon.com/Formation-Multiple-Unmanned-Automation-Engineering/dp/103214940X

Personal Business Model Canvas

Digital Marketing Manager

Author: Joanna Wójcik (UITM)

Digital Marketing Manager | Personal Service Model

Who Helps You

Chief manager
Developers
Graphics

Subject Matter Experts

Project management

Business stakeholders

What You Do

Marketing campaign
Content creation
Web Analytics
Adds

Who You Are

Soft skills
Analytical capabilities
Modeling and specification skills
Certificates

Benefits You Offer

Business value of the solution

Increase the profitability of the organization

Increase the competitiveness of the organisation

Roles/Relationships

Facilitator
Product owner

Who You Deliver

Direct contact
Meetings
Specification documents
Presentations
E-mail
Requirements repository

Who You Help

Project business stakeholders

Organization customers

Users of the solutionV

Costs and Consequences

Availability
Moblility
The need for continuous development and being up to date

Stress
Time pressure
Conflicts

Compensation and Rewards

Flexibility
Work environment stimulating development
Frequent interactions with people

Earnings (Bonuses)
Recognition, prestige

Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities
Who you are

Analytical skills

An internet marketing manager must be able to analyze various alternatives and look for the most effective solution for the client. Analytical skills allow you to efficiently find information, assess the reliability of sources, and predict the consequences of decisions. Since the methods of work and tools used in the world of digital marketing are constantly changing, analytical skills are all the more advisable, as the decisions made are not of a repeatable nature. This role requires knowledge of current and developing analytical tools as well as the ability to comb through data with great attention to detail.

Communication skills

Online Marketing Managers must be able to communicate effectively with their team members but also with customers and consumers. They are responsible for creating a brand image that must be engaging to potential audiences. This requires efficient use of various methods of communication: written, oral and non-verbal messages. One of the most important tasks of marketing specialists is to convey the conclusions of research on the recipients of a given product or service to the company's management in order to adjust the best possible marketing strategy. The message formulated should be clear and at the right level of detail depending on the audience.

Skills, abilities
Who you are

Readiness for continuous learning

The internet marketing industry is constantly changing, so an internet marketing manager should have curiosity and a love for learning. This requires an openness to continuous learning and a desire to be well informed. Formal education is not enough, you should take advantage of courses, certification processes and industry events. Not only should you be aware of trends and how to use them, but you should also have the intuition to anticipate them. The more a person knows, the easier it is for them to predict the future. The ability to learn should not be limited to just one field. A digital marketing specialist should have experience in at least a few fields: marketing, web technologies, advertising or psychology.

Creativity

An online marketing manager very often faces something new i.e. bad customer reviews, algorithm changes, socio-economic events affecting the product or service directly or indirectly. All these situations require creativity in formulating a response. Formulating an effective, distinctive and attractive marketing message that brings the intended effect requires creativity. The specialist comes up with innovative features of the marketing message, imagines new market and business opportunities, and thinks how to surprise and delight the users of the products or service. He or she should be able to come up with creative solutions for clients from different, sometimes distant industries which requires a lot of imagination.

Skills, abilities

Who you are

Leadership skills

An online marketing manager leads a team of professionals with different backgrounds, skills and working styles. In order to achieve the goal of satisfying the client's needs, the manager must motivate the team and communicate clearly the purpose of the assigned tasks. This person must have the ability to delegate tasks and trust employees. Leadership skills require understanding many techniques to facilitate stakeholder understanding, conflict resolution and decision making.

Very good understanding of business processes

In order to meet customer needs i.e. create a marketing strategy, digital marketing managers must be able to strike a balance between the interests of customers and the unit they work in (internal marketing department, external agency). This requires an in-depth understanding of how the client company operates, but also the companies that provide the products or services that the online marketing team uses (Google products, Hootsuite and the like). Without this skill, the marketing specialist can get lost in the plethora of information and relationships within the company.

Skills, abilities
Who you are

Excellent project management skills

Managing a skilled team of professionals including copywriters, graphic designers, developers, digital marketers requires project management skills. Planning is crucial, as one of the primary tasks of a digital marketing manager is to assign tasks and precisely manage the workload of the entire team. Equally important is estimating, which is necessary to determine completion dates and the financial outlay per campaign being implemented. As in any team, interpersonal, business or purely technological problems may arise (e.g. choosing the right digital tool), a digital marketing manager should know how to deal with them. A good manager should be able to explain how individual team members contribute to the end goal and how their work affects others. Assigning responsibility reduces the risk of campaign failure.

Excellent English skills, both written and oral

An online marketing manager must have excellent written and oral English skills (sometimes a second language is also required). More and more agencies are serving not only domestic clients but also international ones. Knowledge of the language at an advanced level is becoming an absolute necessity. In addition to conversations with clients, managing a team in which some employees can only speak English, the entire software supporting the work of digital marketers is mostly available only in English. Also, exams confirming digital marketing competencies are mostly available only in English.

Skills, abilities
Who you are

Versatility
Analyzing job offers for the position of Digital Manager, you can see that the list of required skills is very long, and many of them are from distant areas. A sample job offer includes such elements as knowledge of e-PR and e-marketing tools, social media channels, e-mail marketing, campaigns in the CPA, CPC, CPM, CPS and CPL models, the ability to carry out activities in the field of SEM and SEO, as well as non-standard activities in interactive media. This means that the person in the position of online marketing manager should have comprehensive knowledge and, above all, like to develop it.

Basic programming skills
Due to the constant interaction with programmers and web designers, the SEO Specialist should have a basic knowledge of coding. This will help him optimize the online experience and increase conversions. It is good to have the basics of HTML, CSS, Ruby, JavaScript, or PHP etc.

Character Traits
Who you are

Character Traits

The most important character traits of a person who plays the role of a internet marketing manager:

Resourcefulness and good organization are required because the multiplicity of tasks of a manager forces good organization of his work, prioritization and quick reaction to unexpected situations during marketing campaigns.

Stress resistance -A person in a managerial position must learn not so much stress resistance as the ability to ignore stress. During a marketing campaign, situations may arise such as unexpected reaction of advertising campaign recipients, untypical actions of competitors in the area of marketing, exaggerated customer expectations.

Consequence - A marketing manager has to show a lot of patience and consistency. Many times the effects of work such as optimization of advertising campaigns are visible only after several months. Internet marketing tools and methods change very often, which often forces the work by trial and error, failures that inevitably occur are a chance to develop.

Proactive attitude - means willingness to change yourself and your environment. Proactive person focuses on solving problems, regardless of whether they are caused by him/herself or others. A person with a proactive attitude also feels responsible for making sure that development takes place (both in the context of the marketing team and the services provided).

Character Traits
Who you are

Character Traits

The most important character traits of a person who plays the role of a digital marketing manager include:

Open to constructive criticism - working in marketing involves constant defending of one's ideas and open criticism. A manager should be able to recognize his/her own mistakes and be able to use the ideas of others. Constructive criticism should be seen as useful feedback which, if used well, will bear fruit in the future.

Decisiveness - In a fast-paced digital marketing environment, making timely decisions without delays is crucial. A manager like a team leader should make decisive decisions even if they are made under risk or uncertainty.

Ability to work independently as well as in a team - on one hand a manager should be an individual with analytical skills, very inquisitive and creative. However, he or she should also be able to listen to the team's comments and work together towards the goal.

Being ethical - In the world of digital marketing professionals very often change jobs, often working for competing companies in the same industry. They also have a responsibility to the audience of the products and services advertised. This means that such a person should avoid not only illegal activities, but try to act ethically in every situation.

Excellent eye for details - When working with graphic materials and text in advertising messages, one should have the ability to pay attention to details. Typos, stylistic errors, misplaced or inappropriate graphics can cause irreparable damage to the image.

Tools, Environments
Who you are

Knowledge of IT tools, systems and environments

Essential tools for a marketing manager include (at this point):

Project management and bug tracking tools
Such opprgrams support the management of teams and processes. They can also be used to motivate the team, provide feedback and oversee the timeliness of outsourced tasks. The most popular software of this type include Smartsheet or JIRA.

Tools for website statistics analysis
They allow to supervise traffic from both websites and applications and check users' behavior and steps. Additionally, the collected data can be reported including ROI conversion rates. Among the most popular solutions are Google Analytics, Semrush, Amplitude Analytics, Adobe Analytics, Heap.

Office packages or Google Doc- good knowledge of office packages containing an editor, tools supporting presentation and a spreadsheet is also necessary in the daily work of the analyst.

Tools for mailing campaigns and marketing automation
They allow to reach particular customer segments with personalized messages on different communication channels. The most popular tools include GetResponse, SMSApi, HubSpot Marketing Hub, ActiveCampaign.

Tools, Environments
Who you are

Knowledge of IT tools, systems and environments

Essential tools for a marketing manager include (at this point):

Tools for recording traffic and creating heat maps

Allow you to learn more about how customers navigate websites and improve conversion rates. Customer traffic tracking shows you the areas where customers are most likely to click, scroll, read and how they move from page to page, allowing you to improve your website. Some of the best software include Hot Jar, Smartlook, Inspectlet, VWO.

Tools for monitoring all media

Allows you to monitor what customers are saying about your brand. Analysis of opinions allows for quick crisis prevention but can also be used to detect new business opportunities. These tools also help measure the results of marketing activities and increase their effectiveness. Popular solutions in this segment include Brand24, BrandSpy, Newspoint.

Tools for image and video processing

Image and video processing is a common activity of members of online marketing team. The manager should know their capabilities and be able to use them efficiently. Some activities are so simple that they do not require engaging a professional graphic designer. Popular tools include Photoshop, Pixlr, ShotCut, iMovie.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Create and Execute Digital Marketing Campaigns

As a digital marketing specialist, you will develop and execute digital strategy for your organization. You'll be responsible for planning, building, and implementing digital marketing campaigns across multiple channels and platforms. You will use organic search campaigns, paid advertising, email marketing, social media, and other channels to increase awareness about your company, brand, products, and services.

Ad Copywriting & Content Creation

Some digital marketing specialists may work with writers or have access to a budget for hiring freelance writers, but for the most part, digital marketing specialists are expected to perform ad copywriting and content creation to support their online marketing campaigns.

That includes writing guest posts for Digital PR campaigns, creating articles and other resources for organic search, and even writing eBooks for gated content plays, Digital marketing specialists must have excellent persuasive writing skills and an efficient content creation process to be successful.

Develop Visual Assets for Digital Campaigns

Some digital marketing specialists work alongside graphic designers who support their marketing campaigns by creating visual assets, but most are expected to perform this work themselves.

The best digital marketing specialists have advanced knowledge of graphical tools like Adobe Illustrator and can use them to develop assets for display advertising, email marketing campaigns, or infographic marketing.

Administer Websites & Publish Content

Digital marketing specialists administer their organization's websites and publish content to support their marketing campaigns.

Key actions
What you do

Image Source

As a digital marketing specialist, you'll need to understand your company's content management system and be able to perform technical website optimizations by modifying HTML or CSS code.

Monitor & Optimize Marketing Campaigns

As a digital marketing specialist, you will be expected to monitor the performance of your marketing campaigns and optimize them over time. You will use data analytics software tools like Google Analytics to understand how your web traffic is being generated and identify the best opportunities to advance business goals like generating brand awareness or increasing conversions. You will use visual design skills in combination with conversion rate optimization (CRO) software to improve the performance of landing pages and drive conversions.

Communicate Results to Leadership

As a digital marketing specialist in an in-house role, you will likely be reporting to a Marketing Manager or Director of Marketing within your organization. You will need to prepare reports, dashboards, or presentations to demonstrate the results of your work. You will need to analyze campaign outcomes and show a positive return-on-investment from digital channels. You may be responsible for meeting specific KPI targets, such as total conversions, total leads generated, or number of engagements.

Certificates
What you do

A digital marketing specialist can distinguish themselves in the job market by the certifications they hold. Some of them can be obtained free of charge, while some require hundreds of hours of study and resemble extensive post-graduate studies.

Digital Marketing Institute

This institution offers one of the most popular and recognizable certification systems in the world. BMI has certified 18,000 professionals trained by educational partners in over 100 countries. To ensure that the certificate meets the actual needs of the labor market, the syllabuses are developed in consultation with digital experts. The advisory body is the Program Council, which includes representatives of companies such as: Facebook, Google, LinkedIn or Microsoft. The diploma meets European requirements and is on the fifth level in the European Qualification Framework system (short first degree studies).

The certification process and courses can be accessed directly through the DMI website or through national partners where training is provided in national languages (in Poland this is Socjomania). Exams, on the other hand, are conducted in English in cooperation with Pearson VUE.

Certificates
What you do

The most popular certificates include.

1) Professional Diploma in Digital Marketing 🌐 LINK

The training program assumes discussion of key marketing issues and development of skills related to the use of tools. To pass the exam you should have knowledge of modules such as:

- Introduction to Digital Marketing
- Content Marketing
- Social Media Marketing
- Search Engine Optimization (SEO)
- Paid Search (PPC) using Google Ads
- Display and Video Advertising
- Email Marketing
- Website Optimisation
- Analytics with Google Analytics
- Digital Marketing Strategy

2) Certified Digital Strategy & Planning 🌐 LINK

A certification for professionals who plan the marketing strategy of an enterprise. To pass the exam you must have knowledge of modules such as:

- Traditional Communications
- Digital Communications
- Digital Channels
- Automation & Communication
- Budget & Resourcing
- Big Data & Analytics
- Digital Leadership
- Strategy Formulation & Plan

Professional level certifications are also available such as: -

- Expert-Level Certificate in Digital Marketing
- Certified Search Marketing Specialist
- Certified Social Media Marketing Specialist

Full offer and course descriptions can be found at https://digitalmarketinginstitute.com/students/coursesbe

Certificates

What you do

DIMAQ

An increasingly popular qualification standard that has been around since 2015. It defines the necessary level of knowledge and qualifications of digital marketing professionals, allows its comparison and evaluation. The standard is recommended by Interactive Advertising Bureau Europe (IAB Europe) and is available in 9 European countries: Poland, Greece, Slovakia, Slovenia, Serbia, Montenegro, Romania, Bosnia and Herzegovina and Cyprus. To obtain it, you need to pass an exam testing cross-sectional knowledge of 12 areas of e-marketing. Due to the dynamic development of the industry, the validity of the certificate is limited to 2 years and is subject to a recertification procedure.

The certificate, consistent with the assumptions of the European Qualifications Framework, is available at two levels: Basic and Professional.

- DIMAQ BASIC 🌐 LINK
- DIMAQ PROFESSIONAL 🌐 LINK

In both cases the syllabus is the same and covers areas such as:

- Digital marketing - fundamentals and trends
- Strategy and planning
- Display advertising and programmatic
- Search engine marketing
- Video advertising
- Social media
- Content marketing and webwriting
- Mobile marketing
- E-mail marketing
- E-commerce
- Web analytics and ux
- Law on the Internet

As in any professional field, certification needs to be updated periodically. This is extremely important in such a rapidly changing field as digital marketing.

Recertification points are awarded for, among other things: participation in industry conferences (active - speaker, lecturer or passive - participant), participation in industry training/workshops, publications on digital marketing, participation in IAB Poland working groups, university or postgraduate education.

Certificates
What you do

In addition, the usually free certifications provided by providers of particular tools used by Internet marketing professionals are also valued. Particularly popular are:

1) Google Analytics and Google Ads IQ individual certifications

Skillshop (formerly Academy for Ads) is Google's training platform for all professionals using Google tools. And it's hard to imagine a digital marketing professional without these skills. The Individual Qualification Certificates show potential employers your proficiency with Google. To earn the certification, create a Skillshop account and take Google Analytics and Google Ads courses at beginner and advanced levels. You can choose the training path and get certificates after passing the tests. The certificate is valid for one calendar year. To keep the validity of the certificate you need to take the test again after one year. Trainings are free of charge, on average up to 6 hours should be spent on one level.

🌐 LINK

2) Hootsuite Social Marketing Certificate

Hootsuite is the most popular social media management platform among marketers. The certifications offered by Hootsuite are paid, while some training is free and provided on the website. The certifications are unlimited in duration.

The most popular courses and certifications are:

1. *Hootsuite Platform Certification Course* - demonstrating the ability to use the Hootsuite platform.
2. *Social Marketing Certification Course* - a general education course. The certificate demonstrates knowledge of basic social media marketing principles and strategies.

All certification programs are available on the Hootsuite education website at

🌐 LINK

Certificates
What you do

3) HubSpot Certifications

HubSpot is a popular software for marketing, sales and customer service, with a completely free CRM program. Each of these marketing automation tools is full-featured - but they work most effectively when used together. Those who use HubSpot can earn 22 free certifications in areas such as:
- Marketing
- Sales
- Design
- Marketing Design

Certificates in Digital Marketing and Digital Advertising are especially recommended.

All certificate programs are available on the education website at

🌐 **LINK**

4) Internet Revolutions: the basics of digital marketing certification

For beginners who want to master the basics of Internet marketing. The course has been accredited by the Interactive Advertising Bureau (IAB). The course consists of 26 modules developed by Google trainers for 40 hours of learning. In each module you will find practical exercises and examples. The course is free of charge.

🌐 **LINK**

Link to the course:

5) Facebook BluePrint Certification

Certification for those involved in planning and executing marketing campaigns using Facebook. The Facebook Certified Digital Marketing Associate certification is recommended for beginners. Certifications can also be obtained by more experienced individuals and developers. You can prepare for the exams through courses and programs available on the Meta for Business platform

🌐 **LINK**

6) Quintly Academy Certificate

The certificate in the form of a certificate of completion of an online course tests your knowledge of the basic principles of social media analytics. In the online course you will learn how to track and measure your performance goals on social media platforms such as Facebook, Twitter, LinkedIn, YouTube, Instagram, Instagram.

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🌐 LINK

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

An online marketing specialist is responsible for developing, implementing, and managing marketing campaigns that promote a company and its products and/or services. This role plays a major role in enhancing brand awareness within the digital space as well as driving website traffic and acquiring leads/customers.

Strategy and client service

An online marketing specialist must be able to work with, and communicate with stakeholders – internal (senior leadership) or external (clients/prospects) – the value that digital marketing campaigns can bring to an organization. Online marketing specialists should also have budgeting experience, and be able to understand how to maximize budget and opportunity for each campaign.

More specifically, you'll get to work closely with **website managers and editors, content marketers, email marketing specialists, mobile marketing developers, social media teams, and more**, while also:

Internet marketing specialists utilize websites, e-mail, blogs, social networks, and other online tools to achieve marketing goals. Using consumer behavior and website user traffic, specialists determine their buying habits and target advertisement appropriately. While some businesses may already have large, well-established websites, smaller ones may rely on their marketing specialists to bolster their appeal through engaging content, particularly through social media. They may be in charge of online contests, newsletters and maintaining an e-mail marketing list to help advertise their business to as many people as possible. See the table below for some career facts on internet marketing specialist.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

The digital marketing specialist role has similar objectives and goals as a marketing professional – to increase brand awareness, promote company products or services and to drive prospects to conversions. Unlike using the more traditional marketing channels, digital marketers effectively communicate through appropriate technology platforms.

Digital marketing specialists work to initiate effective marketing campaigns online, and to translate business goals into successful marketing campaigns. They are adept at evaluating the needs of the consumer market, and will understand how and where to acquire knowledge about consumer trends and demands.

Digital marketing specialists are responsible for developing the strategy used in marketing a company's product online. This is done by putting together various online promotions and e-mailing campaigns to get their company's message out, and also by performing consumer research to discover other ways of reaching customers by way of the Internet.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
    1. How will potential Customers discover how you can help them?
    2. How will they decide whether to buy your service?
    3. How will they buy it?
    4. How will you deliver what Customers buy?
    5. How will you follow-up to make sure Customers are happy?

Channels
How you deliver

Direct contact

The most effective form of communication that a digital marketing manager uses is face-to-face meetings with stakeholders. When collecting requirements, these are interviews, focus groups and requirements workshops. The basic way to know the needs of stakeholders is to ask them questions. Interviews are a traditional source of requirements in all software development methodologies. Most digital marketing managers will use some form of individual or small group interviews to obtain requirements for their projects. Agile projects widely use interviews, which are a way to get direct involvement of users. Interviews are easier to plan and carry out than activities such as workshops that are conducted in larger groups.

Attend Networking Events

Although knowledge and resources on digital marketing are widely available from sources such as podcasts and online articles, investing in registering or joining a conference offers you benefits that other sources just can't.

At these conferences or networking events, you have the opportunity to listen to global industry experts, take advice from best-in-class digital marketing professionals and get insight into the future trends in the digital marketing industry. These types of events also have presentations, workshops, and lessons geared to help you build your digital skillset and expand your understanding of why you do what you do.

Not only can local or international conferences revamp your professional skills, but they allow you the opportunity to build relationships with peers and mentors.

Channels
How you deliver

Focus groups

A focus group is a representative group of users who participate in facilitated activities
meetings aimed at obtaining information and ideas regarding functional and quality requirements of the product. Focus group sessions should be interactive and allow each user to express their thoughts. Focus groups are useful when learning the attitudes, impressions, preferences and needs of users. They are especially valuable when you are working on commercial products and you do not have direct contact with end users in your company.

Other forms of meetings

When creating a solution, the digital marketing manager communicates with stakeholders during meetings, which may take different forms depending on the methodology used. The most commonly used are sprint planning meetings, review meetings, stand-up meetings and retrospectives.

During sprint planning meetings, the manager and stakeholders define the system features that should be implemented in the next production cycle, which usually lasts from 1 to 4 weeks.

After the sprint, there is a review meeting during which the team presents part of the solution created and collects feedback and tries to get the approval of the stakeholders. The retrospective meeting concerns the analysis of possible improvements in the process, as well as the methods, techniques and tools used during the last sprint.

Channels
How you deliver

Questionnaires
Questionnaires provide an opportunity to question large groups of users to understand their needs. They are inexpensive, making them a logical choice for obtaining information among large groups of users, and geographical boundaries are not an obstacle to their distribution.

Electronic communication
The manager can also communicate the results of his work via e-mail, online messengers or via a software platform supporting group work, such as Asana. If the stakeholders are geographically dispersed, face-to-face communication can take place via videoconferencing (appear.in, skype). An important element of the design environment that supports communication is the on-line documentation repository, to which all stakeholders have access (it depends on rights granted). Thanks to on-line access to documentation created and developed during the project, everyone is constantly informed about the current status of the project and has an insight into the design artifacts created by the manager. Depending on the role in the project, stakeholders inform the manager about the preferred form of communication. It also depends on the RACI matrix created for the project, which specifies the responsibilities of each stakeholder and the form of its involvement. The forms of communication and its intensity are documented in the communication plan prepared by the digital marketing manager at the beginning of the project.
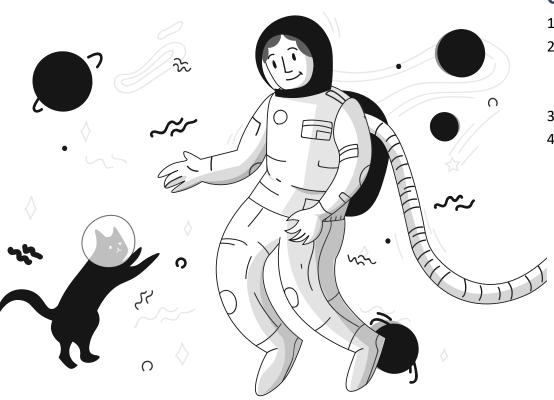
Channels
How you deliver

Presentations

During meetings with stakeholders, the manager should present the results of his work, collect feedback and try to get the approval of stakeholders regarding design decisions. It is important that the form of presentation helps stakeholders understand the assumptions and elements of the solution proposed by the manager addressing the business need. A good understanding of solution requirements reduces the number of patches and change requests, which translates into a smoother and faster project implementation and greater business value of the solution. Most often this is carried out in the form of presentations prepared using the appropriate tool. Presentations in MS PowerPoint are very common. However, managers are increasingly using other forms, such as mind maps. Paper prototypes in the form of mock-ups, wireframes or storyboards that present the interaction of users with the solution are also widely used.
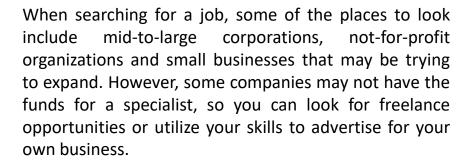
Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
   1. Face-to-face interaction
   2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

When searching for a job, some of the places to look include mid-to-large corporations, not-for-profit organizations and small businesses that may be trying to expand. However, some companies may not have the funds for a specialist, so you can look for freelance opportunities or utilize your skills to advertise for your own business.

Digital marketing specialists can choose to work for an agency, with an in-house team, or start their own firm. These individuals can work as digital sales executives, Internet marketing specialists, search engine optimization (SEO) marketing specialists or digital marketing directors, among other options.

Customer relationships
Roles/Relationships

Become a Member of a Professional Body

Did you know that becoming a certified member of a professional body isn't just for careers like architects, solicitors, or doctors?

Digital marketing is a professional global industry, meaning that being a member of a professional digital marketing body can help demonstrate your credibility and stand out from competitors to land that dream job.

Often, becoming a part of a professional body can only be achieved after completing a certificate program. For digital marketers, a Professional Diploma in Digital Marketing course can qualify you to be a certified professional. This course covers all the key elements of digital marketing in depth, including:

Connect with Like-Minded Individuals and Peers

As a digital marketer, a large part of what you do is develop communities online. Whether it's for your personal brand or a global organization, a strong community can make or break your business. So why wouldn't you want to be actively involved in a like-minded community of peers?

Active digital marketing communities (online or offline) can help you recognize the importance of what you do and how it can fit within the 'big picture' of your business and life. As a DMI student or member you get to be part of a global digital marketing community where you can post on forums, network, collaborate and find support from peers.

By communicating frustrations or asking a question about an area of digital marketing you're unfamiliar with, you can gain confidence in your abilities and push yourself to learn and try new strategies and processes.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

Project management
The manager's activities are a subset of project activities. Therefore, the manager must efficiently coordinate implemented tasks with project tasks, which requires close cooperation with project management.

Chief manager
In large projects, the analytical team consists of several people with the lead manager at the head. He is a person with extensive experience who helps managers by indicating good practices and planning their work. He is responsible for the right atmosphere in the team and maintaining the proper pace of work. He also plays the role of mentor and coach advising and asking the right questions.

Technical team
As part of the technical team, the manager works with various roles, i.e. **programmers**, **testers**, **system architects**, and **UX specialists**. All these people help the manager in determining technical risk, the complexity of created solution elements and labor intensity, and inform about the feasibility of system elements.

Project planning would not be possible without this type of support.

Users
This group of partners is an invaluable source of requirements. Thanks to information provided by users, the manager can prepare the specification of requirements and precisely define the scope of the solution. Users also provide feedback, which allows verification and validation of requirements and refines the product in terms of functional requirements.

Business stakeholders
Business stakeholders are a very important element of partnership. Without effective communication with this group, there is no question of properly determining the business need. These people are the source of business requirements and feedback provided during reviews. Thanks to them, it is also possible to efficiently validate requirements and define priorities. Thanks to well-established priorities, it is possible to plan sprints and product releases in a way that allows optimal allocation of funds. Creating a solution with a high level of business value requires constant interaction with this group.

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Digital marketers can make decent money

One advantage of being a digital marketer is that you can just earn really good money. While the average yearly salary in the US is around $75,000, you can earn much more than that if you are willing to work hard and also work for the right company. Moreover, please note that this number only refers to jobs in the corporate world.

You can also start your own digital marketing agency and earn much more than that. In fact, there are digital marketers out there who earn hundreds of thousands or even millions of dollars each year since good digital marketing can really move businesses forward.

Hence, a career in digital marketing can be great for you if you have the ambition to earn decent amounts of money from your work. However, being in the game just for the money is not a good idea since most people will fail sooner or later if they are just working for the money.

LINK

Yet, if you also have an interest in digital marketing, you will probably not have to worry about money that much in the future and you will be able to afford some nice things, at least if you are good at what you are doing and willing to work hard on your career.

Being a digital marketer can be interesting

Since digital marketing is always evolving, you will never know how exactly your work will look like just one year from now.

New devices and software are invented on a regular basis and some of those technical achievements really have the potential to change how internet marketing will be done in the future.

This also means that your job as online marketer will continue to change in the future and while this can be exhausting, it also makes your job interesting and exciting since you can never be sure that you have learned everything you need to compete with the best people in your industry.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

You have to sit in front of a computer all day long

While there are many advantages of a career in digital marketing, there are also some downsides related to it.

For instance, one problem with being a digital marketer is that you will have to sit in front of a computer screen all day long.

This can not only be regarded as rather unnatural from an evolutionary perspective, but it can also lead to problems with your vision and to back pain and other physical health issues in the long run. Many people who work in these sorts of jobs also suffer from overweight or obesity since they simply don't exercise in a sufficient manner.

You will often not see the end result of your efforts

As a digital marketer, you will often set up big campaigns for your clients. However, many times, you will no longer be in charge in a few years and you will therefore often not see the true effects of your efforts. This can be pretty frustrating, especially if you work really hard for your clients and yet don't see the end result of your labor. Compared to other jobs like construction where you really see success pretty soon, you will often not have those moments as a digital marketer and this can be pretty frustrating.

Being a digital marketer can be stressful

Another disadvantage of being a digital marketer is that it can just be stressful.

Especially if you have your own digital marketing agency, you will have many different problems to solve at the same time and some clients can also be really difficult. If you have your own digital marketing company, you will often also work much more than an employee and stress levels are usually much higher.

Golden Reads

	5 GOLDEN READS FOR DIGITAL MARKETING MANAGER	LINK AMAZON
#1	Chaffey, D., Ellis-Chadwick, F., Mayer, R., & Johnston, K. (2009). *Internet marketing: strategy, implementation and practice*. Pearson Education.	https://www.amazon.com/Digital-Marketing-Strategy-Implementation-Practice/dp/0273746103
#2	Vaynerchuk, G. (2013). *Jab, jab, jab, right hook*. New York City: Harper Collins.	https://www.amazon.com/Jab-Right-Hook-Story-Social/dp/006227306X
#3	Bear, J., Baer, J., & Sheridan, M. (2013). *Youtility*. Gildan Media.	https://www.amazon.com/Youtility-Smart-Marketing-about-Help/dp/1591846668
#4	Godin, S. (1999). *Permission marketing: Turning strangers into friends and friends into customers*. Simon and Schuster.	https://www.amazon.com/Permission-Marketing-Turning-Strangers-Customers/dp/0684856360
#5	Deiss, R., & Henneberry, R. (2020). *Digital marketing for dummies*. John Wiley & Sons.	https://www.amazon.com/Digital-Marketing-Dummies-Ryan-Deiss/dp/1119660483

Personal Business Model Canvas

Early Childhood Education Teacher

Author: Soledad Domene, Juan A. Morales, María Puig, Margarita Rodríguez (US)

Early Childhood Education Teacher | Personal Service Model

Who Helps You

University- Faculty

Educational Administration

Educational centres- Schools

Colleagues

What You Do

Promote all-round child development and learning. Design, develop and evaluate globalised teaching proposals. Identify learning difficulties and adjust to children's abilities, interests and special needs.

Who You Are

Hard competences: Basic training on teaching-learning processes
Soft competences: critical thinking, patience, communication, organization, creativity, leadership and teamwork

Benefits You Offer

Create spaces for interaction among peers and with adults

Independence and autonomy

Structured routines

Roles/Relationships

Teaching staff
Pupils
Educational centres

Who You Deliver

Direct contact
Meetings
Marks
Organisational documents
E-mail

Who You Help

Children 0-6 years old

Educational Administration

Families

Costs and Consequences

Availability
Lifelong learning
Pedagogical updating

Stress
Time pressure
Pressure from the Educational Administration
Conflicts

Compensation and Rewards

Vocation
Interaction with the educational community
Flexibility
Creativity

Salary
Social recognition

67

Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities
Who you are

The **Early Childhood Education teacher** is a creative and dynamic person who has a great interest in children. Listening to the little ones and guiding them in the task of discovering the world is something that fascinates him/her. The Early Childhood teacher is also a person who likes to work in groups and is a good communicator. He/she is an organized person, willing to learn throughout life, with an interest in improving society and with the conviction of being able to do so through education.

Skills, abilities
Who you are

Hard skills

Basic training related to educational processes, learning and personality development (0-6 years); learning difficulties and developmental disorders; society, family and school; childhood, health and nutrition; organisation of the school space; teaching materials and skills; systematic observation and analysis of contexts and early childhood education school.
Didactic-disciplinary training, learning of Natural Sciences, Social Sciences and Mathematics; learning of Languages and Reading and Writing; music, plastic and corporal expression.
Practicum, school internships and final degree project.

Critical Thinking

Critical thinking is the ability to analyse the information we receive. It requires the training of skills such as analysis, reasoning, reflection or making judgements that can be learned in the classroom. The development of critical thinking, in early childhood education, is the ability to reason and think logically; to analyse and judge situations appropriately and to act on a basis and with foundation. We must teach children to know the causes and effects of things, reactions, thoughts, facts and ideas.

Patience

Patience is a virtue that every teacher must have, which is why it is said that the teaching profession is a vocation. It is the ability to put up with all the difficulties that arise on a daily basis, such as putting up with being cried at, not wanting to listen to you or not being listened to. It is, as well as tolerating certain behaviours, putting on a good face, trying to look for the positive side in order to move forward. Teachers have to be patient in dealing with diversity and this is the beauty and the challenge at the same time.

Communication

It is the ability of language to express and transmit ideas and feelings through speech. The elements inherent to communicative competence are the knowledge, skills, attitudes, values and behaviours necessary to establish positive communication and interpersonal relationships. In early childhood education, as they develop language and understanding, they acquire the communicative competences to use it correctly, from grammar and vocabulary to the context necessary to understand when and how to express themselves.

Skills, abilities
Who you are

Organization
The teacher, together with his/her colleagues, must promote the most efficient and productive organisation to support the teaching methodology necessary for learning. The organisation of the teaching work is a key dimension for a good functioning of the centre and the early childhood education classroom, taking into account the regulations given by the Educational Administration. The organisation of the infant classroom can be done by corners, workshops, environments or projects.

Creativity
Creativity is the ability to produce original responses to a problem. It is an ability that is in everyone and can be developed. It is the ability to discover new alternatives, to use one's imagination. The importance of creativity in early childhood education lies in the fact that children can not only provide different solutions to conflicts, but also have a greater adaptability to new situations, which ensures that children are happier, have a better attitude towards new situations and feel less frustrated.
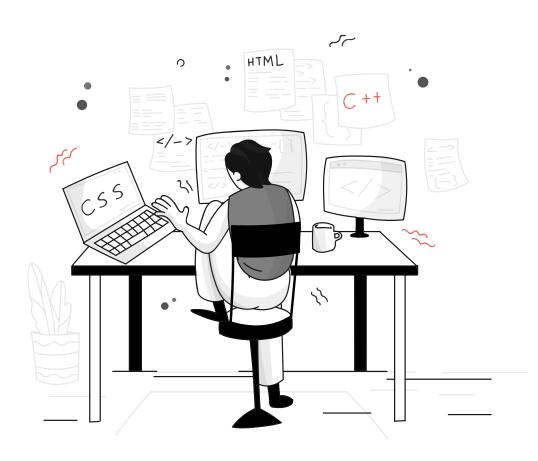
Leadership
Leadership is the ability of a person to influence, motivate, organise and carry out actions to achieve his or her aims and objectives involving individuals and groups within a framework of values. The teacher, as a leader, must be the engine of social change, giving his or her followers the confidence, hope, enthusiasm, commitment and positive energy to achieve their goals. The ability to listen and to communicate are two of the most important competencies that a good teacher leader must cultivate.

Teamwork
Teachers and students learn to solve problems together, developing leadership, communication, trust, decision-making and conflict resolution skills. Teaching teams should evaluate which actions have been useful and which have not in order to improve the teaching-learning processes. Working as a team increases personal motivation and results in greater and more effective learning. Moreover, these results are usually obtained in less time and with less effort.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Promote all-round child development and early childhood learning

Early Childhood Education teachers should promote the comprehensive development of pupils and facilitate learning in early childhood, from a globalising and integrating perspective of the different cognitive, emotional, psychomotor and volitional dimensions.

Teachers should promote the acquisition of habits based on autonomy, freedom, curiosity, observation, experimentation, imitation, acceptance of rules and limits, symbolic and heuristic play. It must therefore, create quality early learning programmes to help children reach their developmental potential and gain the knowledge and skills they need.

Design, develop and evaluate globalised teaching proposals

Knowing the Early Childhood Education curriculum and designing globalised didactic proposals based on it, in which the different areas of the curriculum are addressed, is one of the essential tasks of the teacher.

These proposals should favour the interaction between science, technology, society and sustainable development, promoting interest in the natural, social and cultural environment. At the same time, they should enhance speaking and writing skills, using play as a didactic resource and incorporating learning activities based on playful principles. Encouraging musical perception and expression, motor skills, drawing and creativity, as well as developing experiences of initiation to information and communication technologies is another of the essential pillars to consider when designing teaching proposals.

Teachers must also be able to develop these proposals in the classroom and evaluate them using systematic observation and recording as a basic tool and technique to be able to reflect on practice and reality, as well as to contribute to innovation and improvement in Early Childhood Education.

Key actions
What you do

Identify learning difficulties and adjust to children's abilities, interests and special needs

The teacher should identify learning difficulties, cognitive and attention-related dysfunctions. In addition, the teacher should inform other specialist professionals in order to address the collaboration of the

collaboration of the centre and the teacher in the attention to the special educational needs that arise. At the same time, they must acquire resources to favour the educational integration of students with difficulties and respond to them on a day-to-day basis in the classroom.

Promote good coexistence in the classroom

Teachers should motivate their students with different strategies to create an appropriate classroom environment. They can use games, songs, debates and workshops that promote universal values and good coexistence. It is very important that problems or conflicts outside the classroom are kept away. Students should see this space as an escape, a safe zone. Rules should be created such as saying hello when waking up, saying goodbye when going to bed, being polite, kind and even asking for forgiveness. Coexistence is based on teaching children to respect the rights of others, achieving behaviours focused on respect, solidarity and empathy.

Key actions
What you do

Encourage the acquisition of habits and routines in children

To instil habits in the Early Childhood Education stage helps the moral, affective and social development of the child, as well as making it easier for them to learn different actions in daily life, internalising these habits and finally acquiring greater autonomy in their actions.

Routines are the habit of doing something systematically and continuously throughout the school day every day. They make it possible for children to build the first notions of time as well as to create safe, stable environments. Routines favour autonomy, as everyone goes at his or her own pace; they make it possible to create the notion of time by moving from one activity to another and avoid improvisation. Improvisation.

Create and maintain communication links with the families

Creating and maintaining communication links with families in order to have an effective impact on the educational process is a key part of a teacher's day-to-day work. In this way, they must know and know how to exercise the functions of tutor and counsellor in relation to family education, as well as promote and collaborate in actions inside and outside the school, organised by families, town councils and other institutions with an impact on citizenship education. The teacher must analyse and critically incorporate the most relevant issues of today's society that affect family and school education: social and educational impact of audiovisual languages and screens; changes in gender relations, multiculturalism and interculturalism;

discrimination and social inclusion and sustainable development.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers

Who you help

Pupils (children aged 0-6 years)

Children aged 0-6 years are the main beneficiaries of the work carried out by the teacher, as the main objective is to promote their learning and development.

Families

The families of children from 0 to 6 years of age receive help and guidance from the teacher in order to deal in the most appropriate way with the learning and development process of their children. Teachers maintain close communication links to guide them, resolve doubts and difficulties and accompany them at the same time as they work directly in the classroom with their children.

Educational Administration

Educational administration depends to a large extent on the work done by the teacher. In this way, the teacher becomes its main actor and the work done by the teacher contributes to the functioning of the educational administration as a whole. Coordination, innovation, responsibility, professionalism and commitment are essential for this.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

Create spaces for interaction among peers and with adults

As Vigotsky (1978) argued, interactions between children and adults play a fundamental role in learning. He argues that the level of potential development is determined by the ability to solve problems under adult guidance or in collaboration with peers. Bruner (1983) attaches great importance to the adult-child dyad and considers that children learn language by using it in interactive play activities with their parents. In view of this scientific evidence, it is essential to create spaces for interaction between peers and with adults in schools and families. Therefore, Early Childhood Education should offer the opportunity to favour social interactions in order to encourage the development of social, cognitive and emotional skills.

Independence and autonomy

Independence enables children to create things for themselves and to learn to do things on their own, to fail and to overcome failure. It is a determining skill for the future. In Early Childhood Education, autonomy and independence must be stimulated in order for them to become responsible adults. We must educate children who know how to make decisions for themselves and who do not allow themselves to be influenced by others.

Structured routines

Teaching routines in Early Childhood Education allows children to organise learning in a regular, permanent and stable way. In this way, routines and rules follow one another in a structured way during the school day, establishing guidelines that help in the organisation of the classroom, which are essential for the child's overall development. Among the routines they must learn, we highlight: order, hygiene, feeding, dressing, resting, coexistence, assembly, individual and group work, etc.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
    1. How will potential Customers discover how you can help them?
    2. How will they decide whether to buy your service?
    3. How will they buy it?
    4. How will you deliver what Customers buy?
    5. How will you follow-up to make sure Customers are happy?

Channels
How you deliver

School documents
Documents specific to each centre containing different aspects of its operation and organization.

School website
The school's website is one of the main channels for publicising the school and the way it works. It provides access to teachers' personal websites or blogs showing the daily workings of the classrooms.

Open days
Open days, which are usually held close to enrolment periods, are an important channel for getting to know the centre, visiting its facilities and interacting with the teaching staff.

Interviews with families
Interviews with families are another of the most frequently used channels for dialogue with those in charge of the centre and with the teaching staff, in order to find out details of its day-to-day running.

Student satisfaction and level of student learning
The best way to assess the work done by a teacher and by a school as a whole is to look at the degree of student satisfaction and their level of learning.

Family satisfaction
The degree of satisfaction shown by families with the accompaniment and support received by the teacher and the educational centre throughout their child's learning process is another indicator of the work and functioning of the centre and the teacher.

Role of the school and the teaching staff in the environment
When a school and its teaching staff work for the benefit of the environment in which they are located, this is an indicator of commitment which is usually related to a positive assessment and is therefore attractive for the school itself.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

Direct contact
In Early Childhood Education there are different direct channels of participation between families, teachers and pupils. These moments take place at the centre, when entering or leaving, among classmates, class meetings, events such as Christmas, etc. In addition, families and teachers can participate in the school council. For all these reasons, the issue of direct family-school relations is fundamental for children's learning.

Meetings
Co-operation and working together is essential for the success of Early Childhood Education. For this reason, the team of teachers must carry out coordinated activities based on respect for each other. The educational project of the centres must consider respect, coordination and sharing in order to achieve significant learning for the children.

Marks
The children's marks are given to their families, considering that in Early Childhood Education, assessment is global, continuous and formative in nature. That is to say, the development achieved by the child is evaluated and the learning acquired is identified. The main technique of the evaluation process is direct and systematic observation.

School documents
All documents produced by the center that provide information on its operation, organization and activities.

E-mai
Through e-mail we inform families of all the events and academic aspects related to their children.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

University-Faculty

The Faculties, as the bodies in which the Bachelor's degrees leading to the acquisition of the competences of Early Childhood Education teachers are taught, are one of the main support agents. They are where the studies leading to the necessary qualification to be able to exercise the teaching profession are developed, thus providing the necessary knowledge and skills for the professional future.

Educational administration

The educational administration accompanies teachers in their professional development and offers tools and resources for their evaluation, improvement and renewal, seeking their adaptation to the new realities demanded by society.

Educational centres

The educational centres in which teachers carry out their daily work become one of their main supports. Schools as communities and organisations provide teachers with a context in which to develop as professionals, putting at their disposal all the material and human resources at their disposal.

Colleagues

The colleagues with whom teachers meet throughout their professional career are essential. The teaching task requires teamwork and coordination, so that colleagues from the beginning of initial training and subsequent professional development are sources of learning and continuous help.

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Vocation
The teaching vocation is a concept traditionally linked to the inner call that a person receives towards teaching. Answering this call through teaching is a source of satisfaction.

Interaction with the community
The interaction with the different members of the educational community, the exchange of ideas, opinions and the learning that this entails is another of the benefits of this profession.

Flexibility and creativity
Teaching work is characterised by flexibility and creativity. Teachers develop their creativity on a daily basis and require it in order to be able to respond to the professional challenges they face.

At the same time, their work is flexible, allowing each teacher to work according to their own characteristics and beliefs.

Salary
Teachers have an average salary that provides stability and security. The salary you could earn between €1,500 and €2,500 per month.

Social recognition
The teaching profession enjoys good social recognition, as it is seen as a professional who influences the construction of the society of the future.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Availability
The teacher is a professional who is always available to contribute to the development of his or her students, as well as to guide families. This availability can generate tensions and limit personal time.

Lifelong learning
Lifelong learning is a real need that teachers face in order to be able to respond to the continuous challenges of their day-to-day work in the classroom. It is therefore a requirement derived from their work which they must meet in order to guarantee the quality of their teaching.

Stress
Stress arising from the daily challenges and the bureaucratic burden is one of the main obstacles for teachers.

Time pressure
Teachers are under great pressure to fit their programmes into a given time frame. There is a large amount of content to be covered at this stage of education and a wide range of objectives to be pursued, all of which must fit into the strict rhythms of the school day.

Pressure from the Educational Administration
The educational administration often puts pressure on teachers to solve, act and improve in a short period of time. They are often required to carry out bureaucratic tasks related to the control and quality of teaching, which forces them to extend their working hours outside their workplaces.

Conflicts
Conflicts arise as a result of the continuous interactions in which teachers are involved with the rest of the educational community. Teachers face numerous conflicts with the various members of the educational community on an almost daily basis. Their own well-being and the working environment in which they work will depend on their ability to resolve them calmly and peacefully.

Golden Reads

	5 GOLDEN READS FOR EARLY CHILDHOOD EDUCATION TEACHER	LINK AMAZON
#1	Bryson, T. P., & Siegel, D. (2012). *The Whole-Brain Child: 12 Proven Strategies to Nurture Your Child's Developing Mind.* Hachette UK.	https://www.amazon.com/Whole-Brain-Child-Revolutionary-Strategies-Developing/dp/0553386697
#2	Bredekamp, S., & Joseph, G. E. (2011). *Effective practices in early childhood education: Building a foundation.* Pearson.	https://www.amazon.com/Effective-Practices-Early-Childhood-Education/dp/0135177375
#3	Faber, A., & Mazlish, E. (2012). *How to talk so kids will listen & listen so kids will talk.* Simon and Schuster.	https://www.amazon.com/How-Talk-Kids-Will-Listen/dp/1451663889
#4	Allen, E. K., & Cowdery, G. E. (2014). *The exceptional child: Inclusion in early childhood education*. Cengage learning.	https://www.amazon.com/Exceptional-Child-Inclusion-Childhood-Education/dp/0357630696
#5	Siegel, D. J., & Bryson, T. P. (2016). *No-drama discipline: The whole-brain way to calm the chaos and nurture your child's developing mind.* Bantam.	https://www.amazon.com/No-Drama-Discipline-Whole-Brain-Nurture-Developing/dp/034554806X

Personal Business Model Canvas

Educational Counselor

Author: Soledad Domene, Juan A. Morales, María Puig,
Margarita Rodríguez (US)

Educational Counselor | Personal Service Model

Who Helps You

University-Faculty

Educative administration

Schools

Colleagues
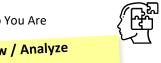
Professional networks

What You Do

Advice
Orientation
Evaluation
Innovation
Training
Planning
Evaluation
Coordination

Who You Are

Know / Analyze
Social skills
Initiative / Leadership
Decision making
Problem resolution
Orientation to results
Information and knowledge management
Teamwork

Benefits You Offer

Personal, academic and professional guidance

Curriculum counseling

Family counseling

Roles/Relationships

Teachers
Students
Families
Management teams
Tutors

Who You Deliver

Psychopedagogical reports
Ccurricular designs
Plans and programs

Who You Help

Students

Families

Teachers
Tutors
Management teams

Costs and Consequences

Availability
Permanent education
Pedagogical update

Stress
Time pressure
Pressure from the Educational Administration
Conflicts

Compensation and Rewards

Vocation
Interaction with the educational community
Flexibility

Salary
Social recognition

Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities
Who you are

The educational counselor usually has a higher education in psychology and/or pedagogy, and must promote the quality of teaching, providing support and advice, applying group work methods, collaborating in individual help and guidance programs, and always acting impartially.

An educational counselor is that person who provides a technical, personal and systematic service to the students of the educational center (school or institute) in which they are located, in order to help them to know themselves: their possibilities, their limitations, their academic tastes, the future profession that you want to practice, or the one for which you are really qualified, etc. In this way, the student will be informed at all times, they will have their own knowledge about themselves and their educational and personal situation, and they will know their environment, in order to be able to make the appropriate decisions, reaching the maximum personal, social, and academic development, giving rise to the transition. logical and natural from child to free and autonomous citizen.

To know

Identify and assess the factors and processes that affect the learning capacity of students and their school performance. Learn about the evolution of the different psychopedagogical guidance and counseling systems. Know the processes of interaction and communication in the classroom. Know how to design the different planning documents of the Center and participate in the definition of the educational project, in the curricular development processes and in the general activities of the center, taking into account criteria of improving the quality of education, attention to diversity, prevention of learning and coexistence problems, and promotion of school success. Know and understand the influences of the socio-cultural environment of the center in the formation of students. Know and understand the educational role of the family and its interaction with the school environment.

Skills, abilities
Who you are

Analyze

Analyze, develop and review proposals for educational materials, situations and contexts based on knowledge of these factors and processes and current theories of learning and instruction. Analyze the relationships between the different educational contexts of students and design orientation and intervention strategies aimed at promoting their articulation and complementarity. Analyze the characteristics, organization and operation of educational centers and assess the functionality of the processes and management bodies, participation and pedagogical and didactic coordination. Analyze the educational power of the school in continuous relationship and interaction with other educational contexts of adolescents.

Social skills

Acquire social skills in relationships and family orientation as well as in communication with teachers and students. Promote a flow of clear and effective communication expressing ideas and opinions in a convincing way, adapting the messages to the interlocutors; listening and being receptive to the proposals of others; creating a climate of trust, empathy and respect inside and outside your work environment; and ensuring reception and understanding.

Initiative

Launch, decisively and quickly, actions on their own, anticipating the problems that may arise and recognizing opportunities that are offered.

Decision making

Being able to choose the best option among several to achieve the desired objective.

Skills, abilities
Who you are

Problem resolution

Efficiency and agility in finding solutions to the problems that arise.

Leadership

Exercise ascendancy, influence and be a reference for others in the development of activities, promoting an environment of trust, collaboration, responsibility and enrichment. Promote the development of colleagues and collaborators. drive teams professionals. Have a broad view of tasks and processes.

Orientation to results

Plan the necessary actions to achieve a specific goal, evaluatingand controlling to guarantee coverage of the objectives pursued. Have the resolution and decision-making capacity necessary to not deviate from the pre-established plans and achieve the marked results.

Information and knowledge management
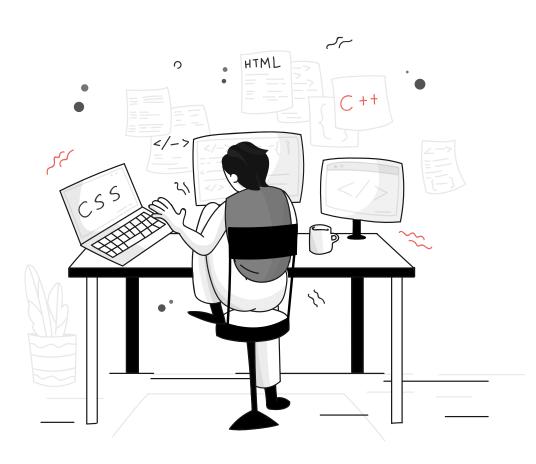
Order, systematize and value all those intangible assets (data, information) in the development of an activity. Manage information resources efficiently to generate knowledge, allowing its effective application.

Teamwork

Collaborate with other people, inside and outside the usual area and context of professional activity, establishing effective working relationships, solving difficulties and adapting to the assigned role. Appear accessible, close and available to third parties, share knowledge and information with other colleagues and work groups and collaborate with them by creating, promoting and strengthening a motivating spirit in complicated situations. Facilitate the integration of new components.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

You must advise both students, tutors and families, always with the aim of improving the educational qualities of the place and interpersonal relationships.

You must identify the educational needs of the students, letting them know at all times so that they know their academic reality. In addition, in case of having special educational needs, it will advise him and his family on the steps he must follow throughout his life as a student.

You must collaborate with the teachers and family in the prevention and detection of learning difficulties that the student presents.

You must provide some psycho-pedagogical advice to the teachers and governing bodies of the center so that they have more educational tools to put into practice in their classes.

Participate in all institutional and strategic plans, as well as in all faculty meetings that are established.

Counselor

Guide students in their personal knowledge, in the progressive definition and adjustment of a life project, and in the adoption of academic and professional decisions, so that all this facilitates their labor insertion.

Adviser

Know the processes of curricular development and the elaboration of institutional plans for participate with management teams and coordination bodies in its design and application. Advise the teaching staff on the review and improvement of the teaching and learning and evaluation processes, and put them into practice in the event of teaching any subject of the curriculum. Advise teachers and, especially, tutors, in accompanying students in their development, learning and decision-making processes decisions. Advise on quality assessment processes and the development of improvement plans.

Key actions
What you do

Collaborator

Collaborate in the establishment of collaborative work structures with teachers and other members of the school community, as well as with other professionals who intervene in educational centers Collaborate with teachers in the review and improvement of teaching and learning and evaluation processes, and put them into practice in case of imparting some subject of the curriculum. Collaborate with teachers and, especially, with tutors, in accompanying students in their development, learning and decision-making processes.

Planner

Identify demands, establish objectives and participate in the design of intervention plans in accordance with the results of the institutional analysis of educational centers and related systems. Know, select, design and apply information strategies and plans and professional guidance for the transition to the labor market and employability. Design and implement, in collaboration with the school community, measures of attention to diversity that guarantee the presence, participation and learning of all students.

Coordinator

Coordinate the preparation of the Tutorial Action Plan at the different levels of the educational system (Infant, Primary, Secondary, Vocational Training and Baccalaureate) and, where appropriate, the Orientation Plan Academic and Professional. Coordinate actions in the area or sector with all educational agents and other services, with special attention to social, health and labor services for a coordinated intervention.

Evaluator

Carry out psychopedagogical evaluations and, where appropriate, prepare diagnostic reports and schooling opinions for students with specific support needs. Identify specific educational support needs associated with disability, developmental disorders, learning difficulties, high ability, and sociocultural factors.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

Students

To the students in their personal knowledge, in the progressive definition and adjustment of a life project, and in the adoption of academic and professional decisions, so that all this facilitates their labor insertion Students with specific support needs, identifying the specific needs of educational support associated with disability, developmental disorders, learning difficulties, giftedness, and sociocultural factors.

Teachers-Tutors

Teacher advisor, characterized as a professional with knowledge and experience in guidance capable of responding to complex educational situations in the form of suggestions, guidelines, procedures or materials addressed to other teachers, either in the face of their demands, or based on the evaluation of needs carried out by the counselor himself or the institution.

Families

Guidance and support for families in the process of student evolution. Information about said process.

Management teams

School administrators will be clients of school counselors because they need their help to be able to carry out the following tasks:

- Supervise the teaching-learning evaluation processes, according to the objectives: evaluation boards, educational relations.
- Accompany in the ongoing training processes of teachers and educational innovation projects promoted by educational teams.
- Advise the process of elaboration, application, follow-up and evaluation of the center's tutorial action plan.
- Collaborate in the preparation of the different plans and projects promoted by the management teams, such as the educational project, the training plan.
- Guide and advise in the processes of change or conflict, related to:
- Human resource management at school: role changes, relational clinic, new teachers.
- The educational action of teachers and tutors
- The application and updating of the normative system.
- Coordinate with the external network of the center in psychopedagogical, therapeutic and social aspects, as a projection of the work in internal networks.
- Promote the development of a healthy institution.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

Personal, academic and professional guidance

Communicator, listener, mediator and ambassador. the decisions made in the guidance department will depend on the present and future of students at all levels related to their life project.

Organizacional and curricular counseling

Expressly and formally responsible for detecting and developing training tasks in the center for teachers. The macro-role of agent of change, defined by the active role of the counselor before organizations and contexts, facilitator of structures, understood as an expert in knowledge, evaluation and, above all, dynamization of entities or institutional structures.

Family counseling

Jointly responsible with the tutors for the parents to acquire the appropriate knowledge, skills and attitudes in order to educate the students-children comprehensively and harmonized from the school and family contexts.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
   5. How will you follow-up to make sure Customers are happy?

Channels
How you deliver

Psychopedagogical reports
Carry out psychopedagogical evaluations and, where appropriate, prepare diagnostic reports and schooling opinions for students with specific support needs. Identify specific educational support needs associated with disability, developmental disorders, learning difficulties, high ability, and sociocultural factors.

Curricular designs
Design and implement, using the resources of the guidance system, support interventions for all students who require it within the framework of the Diversity Attention. Identify and plan the resolution of educational situations that affect students with different abilities and different learning rhythms.

Plans and programs
The development of institutional plans for participate with management teams and coordination bodies in its design and application. Coordinate the preparation of the Tutorial Action at the different levels of the educational system (Infant, Primary, Secondary, FP and Baccalaureate) and, where appropriate, the Academic and Professional Guidance.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

Teachers – Tutors

Relations with the teaching staff-tutors will be produced through the collaboration and involvement of the parties in the knowledge of the student, preparation of plans and programs.

Students

Relations with the students will be produced fundamentally through personal as well as group interviews.

Families

Relations with families are made through formal or informal meetings for training or exchange of information on the educational process of students.

Management teams

Relations with management teams as well as other coordination bodies will take place through work sessions, group sessions for the design and review of institutional plans and programs, school regulations or teacher training.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

University-Faculty
The Faculties as organizations in which the Master's degrees are taught that lead to the acquisition of the skills of the educational counselor are one of the main support agents. In them, the studies that lead to the necessary qualification to be able to exercise the teaching profession are developed, thus providing the necessary knowledge and skills for the professional future.

Educative administration
The educational administration accompanies the counselor in his professional development and offers tools and resources for his evaluation, improvement and renewal, seeking his adaptation to the new realities that society demands.

Schools
The very educational centers in which the teacher carries out his daily work become one of his main supports. Centers as communities and organizations provide teachers with a context in which to develop as professionals, putting at their disposal all the material and human resources available to them.

Colleagues
The colleagues and colleagues with whom the teacher meets throughout his professional career are essential. The teaching task requires teamwork and coordination, so that colleagues from the beginning of initial training and subsequent professional development are sources of learning and continuous help.

Professional networks
Through networks created as a structure to share and support the work of counselors.

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Vocation
Vocation is a concept traditionally linked to the inner call that a person receives towards the exercise of the work of helping and supporting others. Responding to this call through the exercise of orientation is a source of satisfaction.

Interaction with the community
The interaction with the different members of the educational community, the exchange of ideas, opinions and the learning that this entails is another of the benefits of this profession.

Salary
The counselor has an average salary that allows stability and security. The salary of school counselors is similar to that of secondary school teachers, as a guide: Germany 50,357€; Spain 31,609€; Portugal 25,440€; Italy 23,601€; Greece 15,435€; Poland 14,338€

Social recognition
The profession enjoys good social recognition, as it is considered a professional that influences the construction of the society of the future.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Availability
The counselor is a professional who is always available to contribute to the development of his students, as well as to guide families. This availability can create tensions and limit personal time.

Permanent training
Continuous training is a real need faced by the counselor in order to respond to the continuous challenges of his day to day in a classroom. It is therefore a requirement derived from his work that he must attend to in order to guarantee the quality of his teaching.

Stress
The stress derived from daily challenges and bureaucratic burden is one of the main obstacles that teachers have.

Time pressure
Counselors are under great pressure as a result of adjusting to the variety of tasks and people they work with in a given time.

Pressure from the Educational Administration
The educational administration exercises pressure on counselors on numerous occasions so that they resolve, act and improve in a short time.

Conflicts
As a result of the continuous interactions in which the counselor is involved with the rest of the educational community, conflicts arise. The counselor faces numerous conflicts almost daily with the various members of the educational community. His own well-being and the work environment in which he works will depend on his ability to resolve them serenely and peacefully.

Golden Reads

	5 GOLDEN READS FOR EDUCATIONAL COUNSELOR	LINK AMAZON
#1	Greene Ross, W. (2014). *Lost at School: Why Our Kids with Behavioral Challenges Are Falling through the Cracks and How We Can Help Them.* Scribner.	https://www.amazon.com/Lost-School-Behavioral-Challenges-Falling-ebook/dp/B001FA0IN8
#2	Atkins, R., & Oglesby, A. (2018). *Interrupting racism: Equity and social justice in school counseling.* Routledge.	https://www.amazon.com/Interrupting-Racism-Rebecca-Atkins/dp/0815366418
#3	Sklare, G. B. (2014). *Brief counseling that works: A solution-focused therapy approach for school counselors and other mental health professionals.* Corwin Press.	https://www.amazon.com/Brief-Counseling-That-Works-Solution-Focused/dp/1483332330
#4	Smith, D., Fisher, D., & Frey, N. (2015). *Better than carrots or sticks: Restorative practices for positive classroom management.* ASCD.	https://www.amazon.com/Better-Than-Carrots-Sticks-Restorative/dp/1416620621
#5	Tough, P. (2012). *How children succeed: Grit, curiosity, and the hidden power of character*. Houghton Mifflin Harcourt.	https://www.amazon.com/How-Children-Succeed-Paul-Tough/dp/0544104404

Personal Business Model Canvas

Energy Engineer

Author: Artur Romão, Maria José Varadinov (IPP)

Energy Engineer | Personal Service Model

Who Helps You

Branch of:
Renewable Energy;
Forest Residues;
Polymer Industry;

Universities;
Mobility Branch;

Managers of:
Solid Waste;
Waste Water
Treatment;

Industries of:
Agri-food;
Metalworking.

What You Do

Identification of waste generating companies;
Characterization of raw materials and by-products;
Pre-treatment and energy recovery;
Production of renewable gases;
Storage of gases

Who You Are

Research and investigation center in the area of valorization of endogenous resources;
Sustainable production and environment aiming at the circular economy.

Benefits You Offer

Decarbonization;
knowledge of alternative fuels, mainly gaseous fuels (hydrogen and methane);
Gas storage.

Valorization of endogenous resources;
Building the critical sensitivity for new generations.

Solutions for the reduction and recovery of waste;
increase the competitiveness of organizations.

Roles/Relationships

Technological and environmental assistance

Who You Deliver

Technical reports;
Scientific reports;
Meetings;
E-mails;
Economic viability assessments.

Who You Help

Branch of:
Industry;
Mobility;
Universities.

Students and Young researchers.

Waste and waste-water management companies.

Costs and Consequences

Continuous need for development and updating;
Costs involved;
Most CEOs as Engineers;
Versatility;
Demand increase.

Stress;
Lack of time;
Conflicts;
Resilience.

Compensation and Rewards

Very comprehensive and futuristic area;
Frequent interaction with companies;
Different challenge and reasoning stimulus.

Appreciation;
Prestige;
Valorization and personal development.

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Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities
Who you are

Abilities and Soft Skills

- The **Energy Engineer** is focused on combining energy generation and the best use of the environment. It has extensive knowledge about materials, research of these materials, in order to optimize the energy production process and its uses. In this way the engineer acts to plan, develop and analyze projects.

- It is the energy professional who coordinates programs that help define sustainable and optimized use of energy, with the aim of reducing environmental impacts and waste dimensions. In this sense, Engineering Energies has taken on an admittedly relevant role in various domains of society in general and in the environmental market.

Skills, abilities
Who you are

Abilities and Soft Skills

Roles in Engineering Energies:

Renewable energies are the present and, at the same time, the future of world electricity production. The term "renewable" embodies the essence of this type of energy: the ability to be available in nature and to regenerate continuously, without human intervention, spontaneously and in an inexhaustible amount.

Engineering Energies:

- Environmental issues require the intervention of technicians capable of integrating/interconnecting multidisciplinary and transversal matters, associating ecological, social, economic and technological dimensions. In this sense, Engineering Energies has taken on an admittedly relevant role in various domains of society in general and in the environmental market.
- The Engineer Energies is the engineering professional capable of applying the acquired knowledge to the resolution of environmental problems, namely regarding the formulation of the problem, identification of the causes, consequences and processes involved, being able to consider the scientific, social and ethical aspects involved in each engineering project and able to select appropriate tools to assess the problem and its resolution.

Skills, abilities
Who you are

Abilities and Soft Skills

Skills/Professional Qualification of the Engineer:

- Engineering professionals have skills to plan, design, build, operate and manage processes and implement technological systems, articulating the environmental, social, economic, institutional and cultural dimensions.
- The Engineer Energies has appropriate academic training in the basic domains of mathematics, physics, chemistry, and biology, strongly supported by solid knowledge of energies, microbiology, ecology, climatology, hydraulics / hydrology, geology and soils, and has knowledge in complementary areas such as sociology , law and economics, which allows it to have the multidisciplinary elements necessary to carry out a fundamental integration of knowledge aimed at solving complex problems.
- This feature gives the essential ability to implement the best solutions in the environmental area, minimizing environmental impacts and risks, valuing the use of resources and environmental rehabilitation.

Skills, abilities
Who you are

Abilities and Skills

Intervention Domains:

- Engineering Energies is an engineering specialty with great transversal application and must be present and actively participate in all projects and interventions developed in society as part of an ecosystem, promoting professional interaction with the other specialties involved. Despite the scope of action, the diversification of academic training and subsequent specific training, it is possible to systematize the following major areas of intervention:
    1. Energy and Energy efficiency;
    2. Environmental assessment and management;
    3. Waste management;
    4. Ecosystem management;
    5. Water resources management;
    6. Climate change and air quality;
    7. Acoustics and vibrations;
    8. Planning and land use planning;
    9. Environmental health and occupational health and safety;
    10. Management and quality of soils and subsoils.

- They are also professional options in the field of Environmental Engineering, as in other areas of engineering, Education and Research.

Skills, abilities
Who you are

Abilities and Skills

The engineer needs technical skills, but also soft skills. Among them, adaptability is one of the most important skills as it is related to how to adjust to different situations and deal with unexpected changes; Collaboration, that is, the integration with a variety of people with specific personalities and different careers; Communication, both oral and written, and the ability to be a good listener are especially important for completing projects; Attention to detail and creative ability, being able to be attentive and detect the minutiae that can cause failures in projects and at the same time be creative in problem solving and new ideas;

Leadership is another soft skill that must be worked on and of great importance, the energy engineer must delegate tasks, manage teams and coordinate complete projects and must be able to lead in order to get the best out of each employee.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Waste identification:

In the first point, it is necessary for the investigator to make an identification of potentially recoverable waste. It is necessary to hold meetings with interested parties to understand the need, availability and interest of each party to fully understand the problem and propose the best solution. Based on the meetings, questions are asked to verify the possible possibilities, with the contents being directed to the company's specificities.

Evaluate possibilities:

At this stage it is necessary to carry out an analysis of the data collected in the first stage in order to assess all the possibilities and choose the best option. The objective is to define specific points to be developed next.

Teste execution:

Based on the identification of waste and the possibilities found, appropriate methods and tools are selected to carry out the waste treatment, recovery and energy recovery tests.

Key actions
What you do

Analysis the results.
If necessary, an optimization of the problems must be solved, then methods and analysis techniques are used as a simulation and optimization method. The way to visualize the data is associated with a better understanding of the results obtained and the improvement of the models created for analysis purposes. Visualization can get a better insight into the decision situation, or the problem being solved.

Final reports.
At this stage, the researcher prepares a technical-scientific report with graphics and images to be delivered to the company. This report may contain an analysis of environmental and economic feasibility.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers

Who you help

Business stakeholders.

- A stakeholder is a person, group, or organization that actively participates in a project, that is affected by processes that occur in the project or the project's outcome, or that may affect the process or its outcome. They are usually industries that generate by-products, raw materials or that are looking for an alternative energy solution to what they currently use. Stakeholders benefit from a delivered solution that meets the needs of the business and enables return on investment. Stakeholders are concerned about the greatest business value of the created solution.

- Decision makers, beneficiaries of the solution.
- These are the "people" who will use the project results. For example, an entity that produces a certain waste, whose current destination is the landfill, this waste can be part of a parallel line of energy recovery, improving the efficiency of the process and reducing energy costs. Thanks to the results of the experiments carried out, users will be able to more effectively implement their daily activities and make better decisions. The solution can also significantly affect the costs and duration of the business processes.

Customers
Who you help

The energy engineer has several competences, being able to act in the diagnosis, analyzing the best form of energy and the best conditions of use; technology development, working with the development and use of new technologies; optimization of consumption, in order to reduce the expenses of companies and institutions; planning and coordinating power plant implementation processes and analyzing environmental impacts.

Superiors, team leader, team members.
The project's superiors will be a member of the team that will carry out the project and another member of the entity interested in the results of the project. In this case, the beneficiaries of the results of the work carried out by the project are the partners, for whom the results of the experiences are the most important. For large projects, Engineer Energies will work in a team in which members perform tasks depending on their specialization. In such a team, there may be scholarship holders selected in detail, as desired. Therefore, the activities of the team members are complementary, and the results of the completed tasks are used by the team to provide the final solution.

Customers of the entity for which the project is being developed.
The development of the experiences carried out can reach a highly viable solution and, for which, its high commercial value can translate into lower costs of the processes implemented by the organization and, consequently, in more competitive prices for the products and services offered to customers. A well-designed solution can also open new communication channels with interested parties, increasing the added value of the developed solution.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value porposition
Benefits you offer

Improve the value proposition.

The valorization of endogenous resources, obtaining own energy source in parallel with decarbonization, can be the source to improve the value position. The implementation of alternative energy systems, the reduction of expenses with by-products can lead to the creation of products that precisely meet the organization's needs, depending on the specifics of the segment to which they belong. All these elements, that is, improving the value proposition, increasing the accuracy of decisions, optimizing business processes and creating products / services that precisely meet the needs of the customer or the organization itself, can translate into a significant increase in competitiveness of the organization.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
   5. How will you follow-up to make sure Customers are happy?

Channels

How you deliver

Visibility:

Create a specific channel to share tips and relevant content about your business segment. Maintain activity on social networks with relevant hashtags in the development of energy systems. Create a visual entity, which will be the way to express a professional image and create a good reputation with customers. Another way to increase the company's visibility is to create partnerships with entities in the fields related to your segment.

Channels

How you deliver

Meetings:

- The most effective form of communication is face-to-face meetings with stakeholders and team members. The basic way to understand stakeholder needs and formulate a problem that will be resolved as part of the process, is to look at the problem and ask about it. Interviews are a traditional source of information about a problem, available data, purpose of analysis, obtaining requirements...

- A preliminary report should be developed, as a way of creating a connection between the requesting entity and the team members, with a view to solving the problem. Analytical reports contain a concise presentation of the results of the analyzes carried out. It is important that the report is written with the main objectives of the analysis in mind and addresses significant issues that should be addressed.

Channels

How you deliver

Visualization of results.
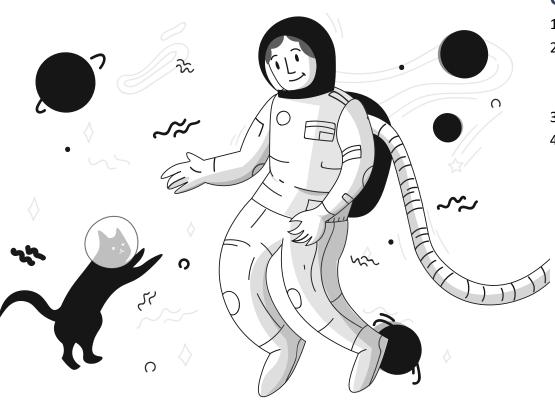
The solution to the problem, the results of the analysis and the conclusions about the recommendations can and should be monitored and visualized by the project partner (physically or remotely). Thanks to them, the company's stakeholders can understand and interpret the results and their validity in a specific decision context much more easily.

Results presentations.

During stakeholder meetings, team members should present the results obtained, collect feedback and try to gain stakeholder acceptance of the proposed solution. Presentations should focus on key points and not be scattered so that there is good understanding. This good understanding will reduce the number of experiences, costs and change requests, which translates into a smoother, faster project implementation and greater business value of the solution.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

Interaction with the interested party.

- Acting as a consultant, Engineer Energies provides the client with the analysis results and works closely with him throughout the entire project. Relationships are built through direct contact and the quality of the tasks implemented, which translates into the veracity of the recommendations made.
- Engineer Energies can also make decisions in the situation where the results of the analyzes performed relate to problems he solves in his workplace and makes decisions based on the results obtained. The leader's role concerns a person who works as the Project Manager. In this case, he coordinates the work of the team and is in the customer-team interface, providing information about the problem to be solved to the team members.

Customer relationships
Roles/Relationships

Interaction team members

- Building team relationships is particularly important to the success of Energies projects. It is important that team members get to know each other well in areas such as preparation, cultural factors and experience before starting the project.
- The personal knowledge of team members significantly reduces the number of conflicts and positively affects the work environment in the area of learning and sharing knowledge and experience. The project is not one person specific and requires the input, effort and knowledge of many field experts working together as a team. As each team member has strengths, weaknesses, preferences and technical knowledge, understanding these issues is very helpful when trying to increase team productivity and efficiency.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
    - advice,
    - motivation
    - opportunities for growth
    - specific resources needed
4. they may be:
    - Colleagues
    - Mentors from work
    - Members of professional network
    - Professional advisers
    - Family members
    - FriendS

Key Partners
Who helps you

Mentor:

The mentor must be an employee (or ex-employee, in some cases) of the company. This is because it does not only have the role of passing on technical guidelines, but also cultural and behavioral ones. Therefore, he must efficiently coordinate the tasks performed with the project tasks, which requires close cooperation with the project management. He also often plans the work of team members. He can play the role of mentor and coach, advising and asking the right questions.

Team members.

As part of the team of scientists, he works with people in various roles, namely laboratory technicians, operations and maintenance technician, team manager and other specialists in the field. All these people assist in the scope of activities related to the process.

Key Partners
Who helps you

Business stakeholders.
- Business stakeholders are a very important element of the partnership. This relationship can be of greater freedom when each side of the alliance can form new partnerships, or of exclusivity, limited to a single partnership and no other concomitant relationship..
- Without effective communication with this group, it will be impossible to reach a solution to the problems studied. These people are the source of business requirements and feedback provided during reviews. Creating a solution with high business value requires constant interaction with this group.

Key Partners
Who helps you

Engineering Energies Unit.

- Is a research unit with a multidisciplinary profile, whose scope of activities and strategic objectives converge to the valorization of endogenous resources in low-density territories, with a rural, peripheral and cross-border matrix.
- Is organized, in an inter and transdisciplinary way, in a single research group, concentrating its main research effort in three central thematic areas:
  - Energy and waste recovery;
  - Sustainable production and environment;
  - Enhancement of low-density cross-border territories.

- It has a semi-industrial pilot-scale experimentation center with laboratory support for bioenergy technologies. The objective of this infrastructure is to promote the creation of knowledge in the areas of energy, bioenergy and waste recovery, among others, developing I&DT projects financed based on partnerships with business and industrial entities, as well as being a promoter of the creation of new companies and projects.

Revenue and benefits

Revenue and benefits Include:
- All income sources
- salary,
- contractor or professional fees,
- stock options,
- royalties,
- health insurance,
- retirement packages,
- tuition assistance.
- Soft benefits
- increased satisfaction,
- recognition,
- and social contribution.

Revenue
What you get

Employee market.
The team is made up of a mentor, several coaches and one or two fellows. It is currently difficult to find highly qualified labor, resulting from the low salaries shared in the public service in Portugal, with averages below €1000 per senior technician. Companies recognize this problem and seek to attract talent by offering more attractive remuneration through research grants (€1,104 for a PhD).

How to succeed at work.
In order to be successful, as in the field of renewable energy engineering, the market demands that the professional know not only the technical part, but also help the client to better understand several aspects, ranging from issues directly related to the cost-benefit and operation of energies clean up to broader aspects like market trends and business essentials. Therefore, it is essential that this professional be curious, creative and adaptable to changes in the path within the outlined strategies.
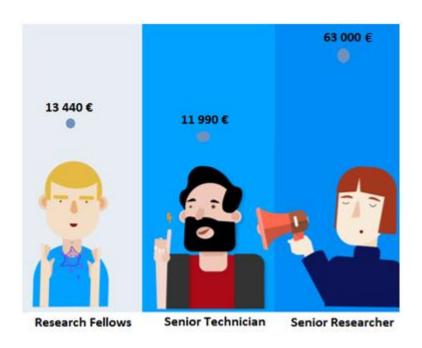
Revenue
What you get

Work environment stimulating development.

The efficient implementation of energy recovery technologies and alternative fuels is a process in continuous development. Each new project will be a new challenge, and each new solution will be the possibility of new applications of well-known methods, techniques and tools. Therefore, the unit must constantly develop both acquired concepts and interdisciplinary knowledge.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Continuous need for development and updating.

The energy sector is a fundamental pillar of the world economy, both from the citizen's point of view and from the companies' point of view. choices and decisions . The continuous training of a EE unequivocally constitutes an essential management tool for qualifying training for the exercise of a given professional activity. The existence of different professional profiles, with the need for certification, makes the EE concerned about constant and up-to-date training.

Costs involved.

There are many advantages to becoming an engineer, and these are often the ones that most attract the attention of new students or career hopefuls. Among them stand out the high wages – regulated by the salary floor –, the possibility of career advancement, the versatility of performance and a recent increase in demand for this professional.

Most CEOs as Engineers

The research we cited reinforces this preference of companies for professionals trained in engineering occupying management positions. While this may take the day-to-day professional away from developing technologies and inventive formulas, it is a career step forward.

Costs
What you give

Versatility
In addition to management positions, an engineer can still develop in different areas with the relationship between the different engineering areas. Anyone who thinks that an engineer only builds buildings is wrong: he is also involved in various manufacturing activities, from automobiles to weapons, passing through ships, planes, robots and entire factories.

Demand increase
The engineering energy sector grew the most in 2021. With signs of an end to the economic recession and sanitary barriers promoted as a fight against covid-19, the trend is for the market to warm up again – and consequently, the employability of this professional.

Costs
What you give

Stress
Stress is normal to happen, up to a certain level it is positive, it can help in achieving goals and in work performance, increasing creativity in problem solving. It becomes a problem when it is recurrent and reaches high levels.

Conflicts
In the workplace, we spend many hours working with other teammates. It should be taken into account that each one has a unique personality and values, so when interacting with others it is very easy to generate discussions. Therefore, conflicts at work are quite common in a company.

Lack of time
While working as an energy engineer, there may be some lack of time at certain times of the year, such as laboratory and industrial testing campaigns, certification of results, optimization of parameters, etc.

Resilience
Knowing how to overcome adversity and find a solution to the problem, which is great for companies. When the employee is not shaken and tries to be useful when things are not going well or when the company is not going through a good moment, this is proof of resilience at work.

Compensating and Rewards
What you give

Comprehensive and futuristic area
Today there are already large energy projects. In addition, many tests are being carried out with the aim of implementing large-scale projects, aiming to replace the main energy matrix that we have today. In short, there is a great awakening of large industries for a more ecological future!

Frequent interaction with companies
Derived from the fact that it is a very current and comprehensive area, the EE will contact many companies in the area but also with companies that are not in the area, empowering the EE with new skills.

Different challenge and reasoning stimulus
The renewable electricity sector has been at the forefront as one of the key instruments for Europe's economic recovery, which should boost a competitive, fair and low-carbon economy. In this sense, it is now necessary to direct efforts towards the fulfillment of the objectives, linked to the European Commission in its Energy and Climate Plan for 2030.

Golden Reads

	5 GOLDEN READS FOR ENERGY ENGINEER	LINK AMAZON
#1	Jenkins, N., & Ekanayake, J. (2017). *Renewable energy engineering.* Cambridge University Press.	https://www.amazon.com/Renewable-Energy-Engineering-Nicholas-Jenkins/dp/1107680220
#2	Kemp, W. H. (2012). *The renewable energy handbook: the updated comprehensive guide to renewable energy and independent living.* Aztext Press.	https://www.amazon.com/Renewable-Energy-Handbook-Revised-Comprehensive/dp/098101321X
#3	Nelson, V. C., & Starcher, K. L. (2015). *Introduction to renewable energy.* CRC press.	https://www.amazon.com/Introduction-Renewable-Energy-Environment/dp/1498701930
#4	Boyle, G. (2004*). Renewable Energy Power for a Sustainable Future.* Oxford University Press.	https://www.amazon.com/Renewable-Energy-Power-Sustainable-Future/dp/0199545332
#5	Andrews, P., & Playfoot, J. (2014). *Education and training for the oil and gas industry: Building a technically competent workforce*. Elsevier.	https://www.amazon.it/Education-Training-Oil-Gas-Industry/dp/0128009756

Personal Business Model Canvas

Financial Analyst

Author: Mirosława Braja (UITM)

Financial Analyst | Personal Service Model

Who Helps You

Supervisors

Team members

Networking

Tutors at talent programs

What You Do

Provide data for decision making process in your organization

Provide forecasts and models which may prepare your organisations for future challenges

Who You Are

Analytical skills
Numeracy skills
Synthetic thinking
Argumentation skills
Good understanding of economic/financial phenomenas

Benefits You Offer

I let people make better decisions by delivering most suitable analyses

I deliver forecasts and models which help my organisation face future challenges

I contribute to the improvement of my organisations' competitiveness

Roles/Relationships

Support for senior Staff
Advisor
Decision maker
Team leader

Who You Deliver

Analytical reports
Data visualisation (infographics etc.)
Electronic communication

Who You Help

Top-tier management

Investors and potential investors

Operations units

Costs and Consequences

Demanding mental work

The need for continuous development and being constantly up to date

Stress

Costly and time consuming certification

Compensation and Rewards

Different opportunities of specialisation

Various perspectives of further development

Remuneration

Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities
Who you are

A financial analyst is responsible for a wide range of research-related tasks for a company or a client. If you want to become a financial analyst, you have to be able to collect data, assess their credibility and analyse various datasets. Furthermore, you will search for the relationships between different economic and financial factors, explain identified deviations and provide various entities with credible data. As a financial analyst, you can focus on a particular part of financial analysis (i.e. financial statement analysis, product finance, KYC analysis, controlling, due diligence) that will require specialised knowledge. However, core skills and features of a good analyst are common, no matter which precise career path you would like to go.

Analytical skills

Analytical skills are critical for any financial analyst, as they let you work efficiently with different datasets and select the ones which are the most appropriate for delivering an expected outcome. As an analyst, you should prepare the required information on time and demonstrate the ability to conclude the results. Since the economic environment is constantly changing and businesses' exposure to various risks is rising, a good financial analyst should demonstrate an excellent ability to connect the dots and determine relationships between various economic factors.

Numeracy skills

Throughout the career path, each financial analyst works with numbers. Numeracy skills mean that you understand mathematics and information lying behind the obtained values. You demonstrate numeracy skills when you are able to use, interpret and communicate mathematical information to solve real-world problems. These include the ability to understand elementary mathematics, and to use graphical, spatial, statistical and algebraic concepts. These skills allow you to interpret results and apply them to real-world situations.

Skills, abilities
Who you are

Synthetic thinking

Synthesis refers to building clear and general conclusions from a large set of detailed information. If you think synthetically, you can transform precise and dispersed results into an extensive diagnosis. As a financial analyst, you will have to provide your clients with recommendations and conclusions built on the obtained results. Synthetic thinking will let you organize your thoughts and present them in a structured form, thanks to focusing on its most impactful, relevant or outstanding parts.

Effective communication skills

Financial analysts must be able to communicateeffectively with their team members but also with customersand supervisors. They are responsible for delivering the most accurate output for their clients and/or organisation, and this outcome is possible only when clients' needs are precisely identified. To address this issue, financial analysts use different tools (online, social media, face-to-face chats) that allow for cost-effective communication with their clients. The message formulated should be clear and adjusted to the audience.

Self-organisation skills

Financial analysts usually work on several projects simultaneously, and in the meantime they are expected to prepare some shorter ad-hoc analyses. Such a work requires perfect self-organisation and time management skills. Good understanding and application of self-motivation and workload management techniques will let you efficiently prioritise and focus on the most important and urgent tasks in order to deliver the outputs in a timely and effective manner. To you, it means less stress and more satisfaction from your work.

Argumentation skills

As a financial analyst, you will have to present the results of your work to various stakeholders in your organisation. The results of your work will contribute to the decision-making processes. Usually, the addressees of your analysis will expect you to justify your conclusions and claims, and you will have to explain your logic to the audience. Argumentation skills will let you discuss problematic aspects with participants who take different positions and allow you to change either your or their minds as the dialogue proceeds.

Skills, abilities
Who you are

Good understanding of economic/financial phenomena

A diploma from an economic or financial faculty from a good University may help you enter the financial world, but is not necessary. Even if you have graduated from another field (such as statistics, mathematics or other faculties related to numeric methods), you can still become a successful financial analyst. To do so, you need to develop a deep understanding of relations, phenomena and processes taking place in the business and financial environment. This knowledge is vital for any financial analyst because at work you will search for correlations of various factors and explanations of deviations of particular values, as well as build financial models which employ economic features.

Computer literacy

Efficient financial analysts have to demonstrate excellent computer skills in various areas and use modern data analytics tools. While building datasets, you need to operate on various databases either internal ones built within the organisation you work for, or external ones provided by specialised entities, such as market makers, financial authorities or research agencies. If you feel like the financial analyst position suits you, think about mastering your MS Excel skills and don't forget about analytical add-ons, such as PowerBI or VBA (Visual Basic) or Macabacus. Also, basic programming skills may let you improve your analysis, and the use of programming languages such as R or SQL may be important while working with larger datasets.

Personal qualities
Who you are

Personal qualities determine how you interact with the groups around you. These are general traits which are important for progressing in business and finance. A financial analyst should demonstrate the following qualities:

Critical thinking

Critical thinking means the way of thinking in which you question, analyse, interpret, evaluate and make a judgement about what you read, hear, say, or write. For financial analysts, critical thinking allows for questioning his/her results so that the author may look at the analysis from various perspectives. If you think critically, it means that you consider the obtained results, but it does not mean you neglect them. Critical thinking allows for determining any gaps in your reasoning, so it will let you obtain more accurate output.

Attention to details

In the financial analysts' world, answers to the questions rarely come fast, and to find them, you will usually have to dig into details. Throughout your career path, you will have to conduct detailed investigations, and you will have to decide when you need them to explain various phenomena. Ignorance of the details may lead to incorrect inference and affect the credibility of your analysis even if a particular detail seemed to be of little importance. This fact is particularly important for the analyses which are being prepared regularly, so do not ignore factors which were unimportant in the previous periods.

Problem-solving attitude

For any financial analyst, a problem-solving attitude means the ability to understand how to tackle a problem. In many companies, it is expected that a financial analyst will take responsibility for a project and deliver it on time. If you demonstrate a problem-solving attitude, it means your search for the optimal way to deliver the results, and if you cannot achieve that, you search for another means. You are focused on delivering the result.

Personal qualities
Who you are

Ability to work under time pressure and susceptibility to stress

Financial analysts deliver analyses and input that are necessary for decision-making. Therefore, the analysts usually work under time pressure, so you should be able to tackle this issue without diminishing the quality of delivered information. Time management techniques and prioritisation may help you work efficiently while understanding the way you react to stress may let you react properly without diminishing your results.

Continuous improvement mindset

While collecting more and more professional experience, the analyses delivered by a financial analyst are getting more and more complex. To achieve the expected outcomes, you will have to widespread your analytical techniques and master your analytical skillset. This requires a continuous improvement mindset understood as the willingness to learn. With such an attitude, you will also be able to collect more understanding of a particular field of expertise. This improvement is not limited to

obtaining professional certificates which confirm your skills and ability to deal with complex and challenging financial issues. One of the aspects of financial analysts' constant improvement is keeping yourselves up-to-date and observing changing market situations. If you are knowledge-hungry and you like to learn, you are on a good way to becoming a successful financial analyst and gathering satisfaction from this position.

Ability to work independently as well as in a team

Financial analysts take responsibility for their results, but they rarely work alone. They have to cooperate with other team members and clients, to provide the most accurate analysis that meets the requirements. As a financial analyst, you should have a self-starter mindset. At the same time, you have to be ready to work with other staff, including your teammates, supervisors, or even the organisation's board. Team work may give you different view on your work, and significantly contribute to your analysis.

Tools and environment
Who you are

Essential tools for a financial analyst include:

MS Office suite or similar packages
Good knowledge of office packages containing spreadsheet and database is necessary for daily work of any analyst. To visualize and present the results of any analysis, it is important to demonstrate advanced presentation preparations skills.

Business Intelligence and reporting tools
Such tools provide financial analysts with toolkits for reporting, analysis, scorecards, and event and metric monitoring. This software allows analysts to generate reports in efficient and smooth manner. Examples of popular tools of this type: IBM Cognos Analytics, Qlik suite.

Enterprise Resources Planning (ERP) systems
hese systems allow for complex management of resources within the organisation. Thanks to well-developed reporting and planning, they allow for rapid reaction to any deviations in enterprise costs and are important sources of information for any financial analyst. The most popular system of this kind is SAP.

Data visualisation tools
They allow to demonstrate the results of the analysis in an effective way and communicate the conclusions to different addressors. These tools include Tableau, Infogram, Google Charts, Grafana etc.

Market data providers
Provide a wide range of tools which deliver current market information regarding prices of securities or commodities, information on mergers and acquisitions etc. Such services include, among others, Thomson Reuters, Eikon/Refinitiv, Bloomberg.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Provide data for decision-making process in your organisation

As a financial analyst, you will be responsible for delivering various managerial data for the decision-making process. It means either large-scale strategic analyses in particular fields or short analyses limited to datasets generated from large databases. Both types of analyses need to be done in an efficient and timely manner, as providing the information is vital for the further work of other Staff members.

Support senior staff

Before you become an independent financial analyst, you will support senior Staff. It may include serving as a junior Staff in larger projects. You should make good use of this time, as it is a unique opportunity to learn analytical techniques and shape your ability to formulate recommendations and conclusions. Learning by doing can bring extraordinary results, as you immediately obtain practical applications of methods, tools and procedures applied to various analyses.

Assess cost changes in your organisation

Financial analysts, especially those who work in the controlling teams, monitor the costs in the organisation and are expected to explain any changes in their structure or value. They are also expected to recommend activities which prevent the organisation from a rise in particular costs.

Assess changes in P&L, Income statement, cash flow

The ex-post analysis is an important part of financial analysts' work. By assessing changes in the company's P&L, income statement and cash flow, you will provide the stakeholders with important information. This analysis may be vital while determining any disadvantageous trends that may even lead to a company's problems with financial standing. But the analysts' activities are not limited to a single company – this analysis may also refer to external entities, such as buyers of products, suppliers. While tackling large transactions, your analysis may play an important role in assessing the risk of a particular deal.

Key actions
What you do

Create financial models

Financial models are vital in modern finance, as they are considered crucial decision-making tools. Financial modelling represents numbers of a company's performance in the past, present, and the forecasted future, and an analyst should demonstrate excellent numeracy skills, and an open-minded attitude. Financial analysts use financial modelling tools to explain or anticipate the impact of events on a company (or entity's stock), from internal factors such as a change of strategy or business model to external factors such as a change in economic policy or regulation.Furthermore, financial models are necessary while anticipating the results of particular investments, as they are used to estimate the valuation of a business or to compare businesses to their peers in the industry. If you decide to become an analyst, you will not find two identical financial models, so if you are a creative and future-oriented person, you may have a lot of satisfaction from building them.

Prepare business forecasts of financial performance

As a financial analyst, you will be responsible for preparing forecasts of the financial performance of a company. This may refer to i.e. the potential impact of a new contract on the company's performance. Structured ex-ante analyses and business forecasts are vital for the decision-making process. Good forecasts may prepare the managers for expected changes in the company's performance, i.e. raising costs. The forecasts may cover various periods and different areas of the company's activity.

Certificates
What you do

Financial analysts can distinguish themselves in the job market by the certifications they hold. Most of well-known international require hundreds of hours of study and resemble extensive post-graduate studies. A well-known certificate proves that a charterholder represents expertise and ethic standards. Some of the advanced courses include:

Business Intelligence & Data Analyst (BIDA)

This program comes in line with a learning program consisting of various topics related to data storage and collection, data transformation, data analysis, and modeling, to data visualization. To be granted the credential, participants must successfully complete all required and elective courses and demonstrate mastery of the topics through completion of the course materials, quizzes, and assessments. After earning a minimum passing grade of 70% in each course assessment, they take the BIDA™ final exam to earn the program certification.
(https://corporatefinanceinstitute.com/certifications/business-intelligence-data-analyst-bida/)

Chartered Financial Analyst (CFA)

CFA is designed for aspiring professionals in wealth management a is a three-part exam that tests the fundamentals of investment tools, valuing assets, portfolio management, and wealth planning. A CFA candidate must hold bachelor's (or equivalent) degree or have a combination of 4,000 hours of professional work experience and/or higher education.
(https://www.cfainstitute.org/en/programs/cfa)

Certified International Investment Analyst (CIIA)

CIIA is an advanced professional qualification for individuals working in the finance and investment industry. This program requires candidates to demonstrate three years' experience working in the domain of financial analysis, portfolio management and/or investment in general. If you meet the requirements, to be awarded with CIIA, you must pass two Common Knowledge Exams which are divided into two levels, the Foundation and Final Level.
(https://www.aciia.org/the-ciia-diploma/cwe-group)

Certificates
What you do

As advanced courses and certifications are relatively costly, you may also benefit from short courses provide free of chargé or at a little fee. At well known learning platforms you will find a lot of suitable courses, and some examples include:

The Language and Tools of Financial Analysis (Coursera, University of Melbourne)
In this course, participants will learn the foundations of accounting principles and financial analysis, develop an understanding of the links between these, and the measurement of value creation at the firm level.
(https://www.coursera.org/learn/financial-analysis)

Fundamental Concepts of Financial Analysis (Alison Courses, Zenith Academics)
This course will let you understand financial statements and the different types of financial statements. You will learn about balance sheet structure and its interrelationship along with liability and other concepts.
(https://alison.com/courses/fundamental-concepts-of-financial-analysis/content)

Financial Analysis for Decision Making (edX, Babson College)
This is a course for you, if you want to understand how to evaluate an idea for a new product or service and determine cost and benefits. You will also learn how to value a stock, bond, and company for business opportunities.
(https://www.edx.org/course/financial-analysis-for-decision-making?index=product&queryID=1ef12e9be8444d0401d33dfd45bd248a&position=1)

The Complete Financial Analyst Course 2022 (Udemy, 365 Careers)
This course will provide you with a complex set of tools and skills which are crucial for financial analysts. The lecturers discuss different analytical tools and methods, including software such as MS Excel.
(https://www.udemy.com/course/the-complete-financial-analyst-course/)

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

Top-level managers

As a financial analyst, you will provide the managers and the board with the most relevant analytical input which they will use to make strategic, tactical and operational decisions in the organisation. Each day, the management can require different datasets from various field. Hence, you need to assess their needs, and check if the analysis you deliver meets their requirements.

Investors and potential investors

Investors play an important role in any business and require various pieces of information. Existing investors want to be updated on company performance, significant changes in the company, and about plans. Individuals considering entering the investment are interested in the materials which let them assess the attractiveness of this option. Financial analysts prepare various materials for both groups, i.e. investment prospects, informative materials, teasers etc.

Operations units

In many companies, financial analysts support operations units, such as sales and marketing, in cost controlling processes, and keep them informed about the deviations, chages and potential consequences.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

I let people make better decisions by delivering most suitable analyses

Financial analysts in any organisation deliver various analyses which are crucial for proper decision-making processes and they must ensure the data provide is at the same time relevant and credible.

Properly conducted analysis related to company's financial performance, placed against a benchmark can help companies assess their weakest points and cost inefficiencies, and plan corrective actions.

I deliver forecasts and models which help my organisation face future challenges

If you want to focus on financial modeling or analysis of investment options, your work will affect investment decisions of the managerial staff.

I contribute to the improvement of my organisations' competitiveness

All these elements, i.e. improving financial performance, increasing the accuracy of decisions, and providing the relevant managerial data can translate into a significant increase in the organization's competitiveness.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
   5. How will you follow-up to make sure Customers are happy?

Channels
How you deliver

Analytical reports

Analytical reports are the most popular way of communication for financial analysts, as they contain a concise presentation of the results of the analyses carried out. The content of such a report must be adjusted to the key objectives of the analysis and present the conclusions that are based on the obtained results.

Data visualisation and infographics
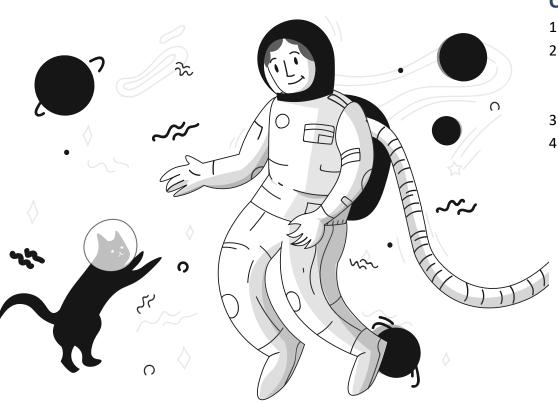
The solution to the problem, analysis results and conclusions regarding recommendations can and should be enriched with properly prepared visualizations. Thanks to these, business stakeholders can understand and interpret the results and their validity in a specific decision context much easier. Communication of the analysis results more and more often takes place in the storytelling approach, which allows effective implementation of the presentation goal.

Electronic communication.

Financial analysts can also communicate the results of their work via e-mail, online messengers or through a software platform supporting group work. Such an opportunity is critical for large global companies whose offices are located in different parts of the world, in different time zones. Nowadays, working in such situations, you can select from a wide range of available solutions. In the case of geographically dispersed stakeholders, videoconferencing (i.e. Zoom, Skype, MS Teams, Webex) substitute for personal communication. Corporations provide employees with project monitoring tools (such as Jira and Trello) which may be necessary while working on detailed analyses that involve more financial analysts.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
   1. Face-to-face interaction
   2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

Depending on their experience and expertise, financial analysts may play various roles within the organisation. As you get more advanced in the analytical work, your roles will evolve and they may include the following:

Junior analyst

This is a usual entry position for any financial analyst. Here, you will learn a lot from your colleagues at senior positions, and you will support them in their daily routine work.

Decision-maker

As your skills develop, you will often work individually with the problems. Hence, every day you will have to decide which way of tackling the analysis is the most appropriate, which methods should be applied to obtain the most relevant output.

Advisor

This is probably the most important and the most responsible role that you will play in your organisation. Most of the analyses you prepare will require recommendations for decision making entities. Hence, you will have to think them thoroughly, as it may affect the performance of business.

Team leader

Successful financial analysts can expect the analyses of raising complexity. Such analyses like due diligence usually involve a significant group of specialists who demonstrate expertise in various fields, including business and technology. Team leades serve as project managers, and are responsible for the delivery of a project in a timely and effective manner. You will have to motivate the team, stick to schedule and monitor the project progres in order to deliver a high quality analysis without any unnecessary delays.
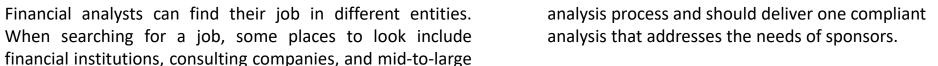
Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
    - advice,
    - motivation
    - opportunities for growth
    - specific resources needed
4. they may be:
    - Colleagues
    - Mentors from work
    - Members of professional network
    - Professional advisers
    - Family members
    - FriendS

Key Partners
Who helps you

Financial analysts can find their job in different entities. When searching for a job, some places to look include financial institutions, consulting companies, and mid-to-large enterprises.

Supervisors

In a junior position, a financial analyst works together with his/hers experienced supervisors. Such an onboarding will let you learn from them and understand the expectations which vary across different organisations. In large projects, such as due diligence projects, financial analysts will work in a team of several people with the lead project manager at the forefront. A project leader is an experienced person, who ensures that the work is delivered promptly and meets clients' needs. A leader usually directs the teamwork, selects the methods and informs you how your work should correspond and contribute to the results.

Team Members

Although a financial analyst may work individually generating various reports from the system, large analytical projects involve different specialists representing different fields of expertise. All these people contribute to the financial analysis process and should deliver one compliant analysis that addresses the needs of sponsors.

Tutors in talent programs

If you feel like a financial analysts' career path is for you, you may enter this inspiring world by participating in various talent programs. Many well-known companies search for talented individuals by offering them training and internships that let them understand if this is what they expected. Through participation in such a program, you will be able to demonstrate your skills and talent to a potential employer. You will build your experience and raise your attractiveness to potential future employers.

Networking

Even in the world of finance, the importance of networking is growing. You can build your network through participation in various conferences, financial seminars and meet-ups. The more active you are in such events, the more potential clients and employers will get to know you. Hence, do not be afraid of asking questions or discussing with speakers. If you wish to discuss something, present your point of view and show interest in what is being told by the others.

Revenue and benefits

Revenue and benefits Include:
1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

As a financial analyst you may expect a competitive remuneration, and your salary will derive from your skills and expertise. Financial analysts have a great opportunity to develop their skills, and this post may bring a lot of satisfaction to finance passionates.

Competitive remuneration
Businesses notice the growing role of financial analysts in their operations and understand that talented and experienced financial analysts can generate significant value for their organisations. Financial analysts' remuneration varies across their specialisation, skills and experience. According to the Sedlak & Sedlak report, a junior analyst at an entry position may expect a salary of approx. 2000 € per month. As you gather more experience, you can expect a much higher salary.

Different opportunities of specialisation
A position as a financial analyst may face different responsibilities and different tasks. The financial analyst may, i.e. specialise in cost analysis, build financial models, prepare business valuation, or assess the potential investments. Financial analysts may also be involved in mergers and acquisition (M&A) transactions or analyse commodity markets. Thinking about specialisation, you may select from a wide range of analyses.

Various perspectives of further development
Financial analysts must constantly develop their skills and keep themselves up to date in a rapidly changing business and financial environment. Although demanding, this position is a great opportunity to start a promising career in the inspiring world of finance. Financial analysts may expect clear career paths, which are good starting points for other positions, such as auditors, investment associates, and financial managers.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Stress

Financial analysts often work under time pressure, which is a source of great stress. Another source of stress is that information provided by financial analysts contributes to decision-making and improvements in the organisation, which relates to great responsibility for the organisation. Also, financial analysts who specialise in investment-related analysis, model development and valuations face uncertainty, because the results of their work will be assessed in the future.

Demanding mental work

Financial analysts' work requires extreme and constant concentration, which is very exhausting. Having a passion for finance will help you tackle this issue. Also, having a non-financial hobby which you are passionate about may help you recover after long working hours in stressful environments and may increase the efficiency of your work. Furthermore, most tasks are fulfilled in front of the computer screen, which relates to the eye fatigue effect. If you struggle to find room for physical activity after office hours, you may face some problems with your backbone, and it may cause other problems, such as obesity.

Costs
What you give

Costly and time-consuming certification
If you want to develop and build your position in the financial world, you may be interested in earning a respected certificate. Such certificates as CIA, CIIA, CFA, and ACCA require a significant entry investment. High fees related to the certification may be a barrier to obtaining a certificate. However, a significant group of financial corporations invests in their employee's development, i.e. by covering the costs of fees and required training. This may let their employees earn a charter they are thinking about. If you do not have to worry about these costs, the certification still requires a significant effort from your side. By earning such a certificate, you will get a confirmation of your extraordinary skills and knowledge in the field of finance. Thus, the exams are demanding and require a lot of learning.

The need for continuous development and being constantly up to date
Even if you do not think about a professional certificate, while working as a financial analyst, you have to learn and keep yourself updated. The efficient implementation of analytical tasks requires investments in the continuous development of skills and knowledge. Such lifelong learning requires a lot of time and commitment but brings a lot of satisfaction to curious and open-minded persons.

Golden Reads

	5 GOLDEN READS FOR FINANCIAL ANALYST	LINK AMAZON
#1	Alexander, J. (2018). *Financial planning & analysis and performance management*. John Wiley & Sons.	https://www.amazon.com/Financial-Planning-Analysis-Performance-Management/dp/1119491487
#2	Berman, K., & Knight, J. (2013). *Financial intelligence, revised edition: A manager's guide to knowing what the numbers really mean.* Harvard Business Review Press.	https://www.amazon.com/Financial-Intelligence-Revised-Managers-Knowing/dp/1422144119
#3	Page, S. E. (2021). *The model thinker: What you need to know to make data work for you*. Basic Books.	https://www.amazon.com/Model-Thinker-What-Need-Know/dp/154911039X
#4	Schilit, H., Perler, J., Engelhart, Y. (2021). *Financial Shenanigans: How to Detect Accounting Gimmicks & Fraud in Financial Reports.* McGraw-Hill.	https://www.amazon.com/Financial-Shenanigans-Fourth-Accounting-Gimmicks/dp/126011726X
#5	Penman, S. H. (2012). *Financial statement analysis and security valuation*. McGraw-Hill.	https://www.amazon.com/Financial-Statement-Analysis-Security-Valuation/dp/0078025311

Personal Business Model Canvas

Forwarder

Author: Jacek Jakieła (UITM)

Forwarder | Personal Service Model

Who Helps You

- Freight Exchanges
- Transport Companies
- Business Stakeholders
- Subject Matter Experts
- ICT Providers
- Associations

What You Do

Transport fleet selection
Monitoring of storage, location
Documentation Management
Planning and managing the transportation process
Consulting, expert opinions

Who You Are

Ability to think analytically and make decisions quickly
Troubleshooting
Ability to concentrate
Ability to document and use records
Multitasking
Organizational skills

Benefits You Offer

High quality customer service in terms of on-time delivery

Increase the competitiveness of the organization

Effective communication with customers and business partners

Cost optimization of outsourced freight forwarding solutions

Continuity of transport orders

Roles/Relationships

Consultant/Advisor
Liaison
Problem solver

Who You Deliver

Face-to-face meetings
Systems supporting cooperation
Online meetings
E-mail
TFL systems

Who You Help

Manufacturing and service companies

Transport companies

Customers of an organization that uses freight forwarding services

Costs and Consequences

Highly demanding, multi-tasking work
Continuous concentration
Continuous availability

Stress
Time pressure
Long hours at the computer

Compensation and Rewards

Recognition
A growth-stimulating work environment
Employee Job Market

High earnings
High relevance of the position to the value proposition of the organization using freight forwarding services

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Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Roles & Skills
Who you are

Possible roles

Transport, forwarding and logistics are the three main sectors of the TFL industry, whose aim, in broad terms, is to handle the transport of goods in both domestic and international markets. Companies operating in this sector handle all processes related to the transport of goods of other entities. An extremely important role in the entire supply chain is played by the forwarder, whose primary task is to provide comprehensive services for the transport of goods, which is the basis for cooperation with their contracting parties. The position of the forwarder may belong to different categories. The most common division is: road freight forwarder, sea freight forwarder and air freight forwarder. You can also find a division into categories depending on the nature and place of work in the chain of activities. Thus, the following "types" of forwarders can be distinguished:

Master Forwarder - is the first person contacted by the Customer.

- The master freight forwarder may delegate subsequent activities to intermediate or alternate freight forwarders.
- Intermediary Freight Forwarder - receives orders from his superior - the Master Freight Forwarder. He performs tasks in the name of the principal Freight Forwarder for the account of the Customer.
- The substitute freight forwarder - as in the case of the intermediate freight forwarder - the substitute freight forwarder receives exactly the same tasks, while the cost of his service is included in the forwarding rate, which is set by the principal together with the principal freight forwarder.
- International Freight Forwarder - deals with international freight forwarding. A freight forwarder working in this position must be familiar with the transport and customs regulations of other countries and with shipping and customs tariffs.
- Customs forwarder - a forwarder working in this position declares shipments for customs clearance, his tasks assume the character of a customs agent.

Roles & Skills
Who you are

Border freight forwarder - border freight forwarder is related to the appropriate location, the work is done by people living in cities located at the border, where the Customs Office is located. The main task of the person working in this position is to work as a customs agent, but may also participate in other work such as unloading and reloading of goods.

Seaport forwarder - a forwarder who works in a seaport. He or she works in forwarding in maritime transportation.

Freight Forwarder - accepts orders at locations where freight is returned for onward transportation.

Freight Forwarder - as the name suggests, this forwarder is responsible for the receipt of cargo and supervises that it reaches the consignee.

Border forwarder - this is called a forwarder who receives an inventory of goods along with a list of their consignees and oversees these groupage shipments.

Road Freight Forwarder

An international or domestic freight forwarder, in road freight forwarding, organizes road transport of various types of goods. The responsibilities of forwarders can be extensive and vary depending on the skills and experience of the forwarder, and the activities involved in the daily work will vary depending on the cargo, the route and the industry of the customer. International Freight Forwarder taking up the task of planning the transportation of cargo, bites into the meanders of transport organization with his forwarding teeth. He conducts a detailed interview with the customer on the specifics of the goods, route, loading and unloading, so as to choose the best option for the means of transport for a particular load. Forwarder's work may be accompanied by many unforeseen situations due to the movement of cars on the road - as you know, absolutely anything can happen on the road! In such situations forwarder saves poise and experience, which allows to solve even the most difficult situations and problems.

Roles & Skills
Who you are

Ocean Freight Forwarder

Generally speaking, a sea freight forwarder is responsible for coordinating the transportation of various types of cargoes by sea. This whole process requires taking into account many aspects and performing activities such as:

choice of mode of transportation and transportation company,

entering into appropriate contracts for transportation services,

insurance of transported goods,

issuance of all necessary transport documents,

completing customs clearance formalities,

taking care of proper labeling of transported goods.

Apart from the tasks strictly connected with the organization of a particular transport, a sea freight forwarder has to undertake actions aimed at ensuring the highest possible quality of service to the customers. For this purpose he monitors the market, searches for new transport companies, maintains good relationships with shipowners and stays abreast of legislation.

Air Freight Forwarder

One of the increasingly sought-after employees is an air freight forwarder. His tasks include the organization of air transport. This employee is responsible for contact with customers. He deals with both exports and imports. Among his main responsibilities are:

- Analyzing and assessing customer needs and proposing appropriate solutions,
- Negotiating contract terms and accepting freight forwarding orders,
- Organizing transportation, determining its terms and conditions,
- maintaining transportation records,
- Building relationships with contractors and optimizing transportation costs,
- Ensuring the highest quality of transportation services.

The employer may require the air freight forwarder to independently solicit customers and subcontractors and invoice.

Skills & Abilities
Who you are

Soft skills
Active listening
Involves eliminating distractions, adopting a focused active listening involves eliminating distractions, maintaining focus, making eye contact, and expressing the most important information in your own words to confirm your understanding of what is being said. As a person who deals with contractors on a daily basis, a Freight Forwarder should have high personal culture and be a good listener. Most of the information related to planning a freight forwarding process that meets the customer's current and future needs comes from conversations during off- or on-line meetings with various individuals and groups. The freight forwarder must ask the right questions to diagnose the needs and plan the process accordingly.

Analytical and systems thinking skills
One of the increasingly sought-after employees is an air freight forwarder. His tasks include the organization of air transport. This employee is responsible for contact with customers. He deals with both exports and imports. Among his main responsibilities are:
- Analyzing and assessing customer needs and proposing appropriate solutions,
- Negotiating contract terms and accepting freight forwarding orders,
- Organizing transportation, determining its terms and conditions,
- maintaining transportation records,
- Building relationships with contractors and optimizing transportation costs,
- Ensuring the highest quality of transportation services.

The employer may require the air freight forwarder to independently solicit customers and subcontractors and invoice.

Skills & Abilities
Who you are

Communication skills

A good understanding of the problems to be solved requires adequate communication with the people raising the problems. It often happens that the problem is solved by several people and therefore the person who continues to work must have a good understanding of the situation. In case the problem is of technical nature and can be solved by the Administrator then it is necessary to properly formulate the problem, provide relevant information and vision of the solution. During strategic planning and design of network infrastructure solutions, effective communication with the management allows to transform business objectives and development plans of the organization into a scalable and easy to maintain solution using well-chosen technologies - architecture, hardware and software.

Therefore, the freight forwarder should effectively communicate specific information to business stakeholders and those with whom he works. He/she must demonstrate good knowledge of the domain language, and the ability to express complex issues as simply as possible.

Should be able to cope with communicating to different audiences who need to have a good understanding of the analytical results and those who need clear and precise recommendations so they can implement them.

Problem Solving

Much of the work of a freight forwarder position involves rapid problem solving and proactively and accurately identifying where problems may arise. Skills in methodical and effective problem solving are critical to this role. Problems may be strictly technical in nature, such as performance, reliability, traffic. They may relate to the solution's compliance with applicable regulations.

Ability to work in a team

In most professions today, we work in teams. The same applies to the profession of a freight forwarder, with the difference that he works as a team with people from inside and outside the company (e.g., drivers, customers). He also works with representatives of business partners on a daily basis.

Skills & Abilities
Who you are

Ability to document and use documentation

The tasks performed by the Freight Forwarder require the use of documentation related to the forwarding. Forwarder must be familiar with the transport documents and current legislation in the country of shipment and destination, because it is the freight forwarder who prepares all the documentation that accompanies the shipment during its journey. In case of the airfreight forwarder, these documents include, first of all, the CMR waybill, as well as the air documents such as MAWB (MasterAirWay Bill), HAWB (House AirWay Bill), Cargo Manifest. Apart from these documents, a forwarder should be well acquainted with INCOTERMS terms and conditions, basics of current customs procedures e.g. he should know that goods cannot be sent or brought to the area without customs clearance. It is the air forwarder who contacts the chosen airline on the basis of the offer and makes the so called booking, i.e. reservation of the seat on the plane.

It is extremely helpful to know the abbreviations of airports and transport terms used by airlines, and the entire mechanism of restrictions that govern air transport.

Freight Forwarder should be able to quickly find relevant information and properly document decisions or problems solved.

Ability to learn quickly

Due to the high dynamics of changes in the field of freight forwarding, Freight Forwarder must very quickly assimilate new information and transform it into knowledge and use it in the implementation of tasks.

Decision making

This profession requires making quick and at the same time very responsible decisions, so the mind of the forwarder is working at high speed most of the day. Mistakes can cost a lot, so a high resistance to stress is required. One of the disadvantages in this profession is intensive, stressful work, so only people confident in themselves and their decisions should take it on. Small mistakes can have huge consequences and cost the company a lot.

Skills & Abilities
Who you are

Knowledge of foreign languages
We don't need to be fluent in English right away. It is enough to know it at the level of e-mail and telephone communication. However, over time, you get to know more and more issues in the industry. There are new problems, new specialized vocabulary. In fact, you learn something all the time. In this job one develops language skills very quickly and quickly grasps unknown vocabulary or industry abbreviations.

Accuracy
A good forwarder must be meticulous. Attention to detail is especially important when transporting valuable goods or urgent orders.

Responsibility
When something does not work as it should, there is no room for looking for someone to blame (for example, the courier did not pick up the package on time). Freight forwarder has to take responsibility for the transport and bring it to the end, despite the difficulties. This way he shows the quality of his work and builds trust in others.

Patience
Working with clients is not always easy and pleasant. Often in case of urgent orders emotions take over and misunderstandings arise. A good forwarder must be able to clench his teeth and neutralize the conflict or clarify contentious issues.

Ability to concentrate
Forwarder is in constant contact with the world: phone, instant messaging, e-mail, software. It is very easy to get lost in all that. A good forwarder can focus on what is most important at the moment and combine information into a coherent whole.

Resistance to stress
This is not an easy skill to learn. It is not about ignoring stressors. A freight forwarder must have the emotional intelligence to handle stress and relieve it. It is not about sweeping the problem under the carpet, but about solving problems that generate stress on an ongoing basis. Stress and burnout accompany forwarder in many situations every day and must be handled efficiently.

Skills & Abilities
Who you are

Top 5 list of most important personal resources

- Multitasking - definitely top of the top!
- Ability to respond quickly - the faster the better,
- Troubleshooting - no conflict, no hassle, no cost, of course.
- Patience - divine, angelic whatever you want, but the more the better!
- Flexibility - to the industry, customers, carriers and the generally changing world.
- Stress resistance.

Tools
Who you are

The right IT technology for the freight forwarding industry

Customers require from forwarders the speed in action, flexibility and comprehensive service. The pace of economic development, as well as growing demands of customers and competition force continuous improvement of service quality:

- transport planning using access to road maps combined with the possibility of communication via GPS or sms
- monitoring order status
- issuance of shipping and other documents, e.g. CMR, SAD, invoices, etc.
- accounting for fuel consumption and travel records
- Planning and accounting for drivers' working time
- calculation of transport route and costs
- Optimization of the number of stops and empty runs
- registration of transport and forwarding orders with printouts
- exporting data to an accounting system

Programs to support the work of the freight forwarder

There are many entities on the market that offer platforms (programs) used to support forwarder's work. Choosing among various offers, one should check and compare many parameters. Important are, among others, integration with functions in particular tabs (e.g. import of contractor data, transport platforms), mobile versions, etc. Each service provider tries to pay attention to the features that distinguish its platform from the competitors' product. Further cost-saving potential can be achieved through enhanced, integrated collaboration based on intelligent IT solutions.

Tools
Who you are

EDI (Electronic Data Interchange) system for freight forwarding

Otherwise, Electronic Data Interchange allows you to conduct fast and simple sales by importing customer orders from the EDI platform and exporting invoices. The hassle of storage, the need for manual handling of data entry and processing, and the associated risk of errors make it worth considering the use of communication with partners via an EDI shipping program. This solution can significantly improve the company's position in relation to business partners and significantly reduce the costs resulting from correspondence.

EDI benefits: cost reduction, elimination of data entry errors, speed of transmission and processing, shortening of the cycle from sale to payment, elimination of language barriers, efficient customer service.

A third solution could be a CRM or TMS system

TMS (Transport Management System) and CRM (Customer Relationship Management) are modern methods that have been designed as tools to improve the daily work of all departments in transport and forwarding companies. Many processes can be handled in one system. Solutions offered by interLAN may serve as an example.

InterLAN SPEED benefits: order processing, management of own and contract fleets and drivers, finance (invoices, notes and compensations, calls for payment, per diems and salaries), integration with external systems (digital maps, telematics, freight exchanges).

Tools
Who you are

Other IT solutions and systems for freight forwarding management

Due to the constant circulation of a large stream of data, the value of modern IT systems such as CRM is increasingly important in the TFL industry. Every day, shippers must manage hundreds of thousands or even millions of records on the order format. It is hard to imagine manually filling out spreadsheets and analyzing such an amount of information that appears. Utilizing tools that modernize data management seems essential to achieving a competitive position in the TFL sector.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

What does a freight forwarder do?

The basis of the forwarder's activity is the organization of the ordered transport of goods. It can be a person who does not deal directly with transport, but has the characteristics of a good organizer, who is able to combine all stages of the entire transport process. However, more often you can meet companies that deal with forwarding using their own transport fleet, which makes the process even more secure, because it is less dependent on other entities. A typical forwarder, after accepting an order for transport, prepares the whole process - from planning, through adequate protection, to its implementation. Typical activities include:

establishing travel routes;

Transport fleet selection;

informing the carrier about the transport details (in case the transport is not carried out with 100% of the shipper's own fleet);

- Handling of transport e.g. by packing, checking condition, loading, possible reloading and unloading itself;
- monitoring the storage of goods, i.e. the method of protection or temperature in the case of foodstuffs;
- monitoring of transport location with constant information on the implementation of the planned transport time.
- In addition to planning and arranging transportation, an international forwarder, as well as a domestic forwarder, is also responsible for:
- process documentation - from preparation of documents to their collection and formal execution (e.g. customs clearance);
- Subcontracts with subcontractors - such as other transportation companies or warehouses;
- insurance of transported cargo to secure the interests of the principal.

Key actions
What you do

Freight Forwarder may also be responsible for other activities related to the process of commissioned transport, such as quality control of goods, storage of goods, or even their sale.

Regardless of the type of goods ordered to be transported, a typical freight forwarder should be able to provide the customer with the highest level of service, which can be defined in this industry by the following characteristics:

- Consultancy - a forwarder, based on his experience, should be able to analytically advise the contractor on how to conduct the whole process so that the transport is carried out as quickly, safely and economically as possible;
- Availability - the Freight Forwarder should be available for the Customer 24 hours a day, regardless of statutory holidays;
- Dynamic transportation management - the ability to monitor all transportation in real time and the ability to make quick decisions.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (project leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

Manufacturing and commercial enterprises

Companies without their own fleet in 78 percent of cases use the services of forwarders or transport companies. 22 percent additionally support themselves with advertising tools, including transport exchanges, and this is exactly the same percentage as in the case of companies with their own fleet of cars. Also in this case, similar is the percentage of companies that occasionally or often have problems with the organization of transport, although they are fully aware of the costs incurred for this. According to the research, only 27.5 percent of surveyed entrepreneurs use the tools to verify the reliability and safety of transport companies (such as the scope of OCP insurance, certificates, permits for the carriage of untypical goods, or the state of the fleet). 70 percent of companies participating in the study in matters of security rely only on recommendations, colleagues from the industry, good general opinion about the company or mutual trust.

Carriers | Transport companies

A freight forwarder can work with carriers, companies that have a fleet that allows them to transport goods.

The specificity of the carrier with which the freight forwarder cooperates will depend on the type of transport. These may therefore be carriers offering transport by road, rail, sea or air. It may also happen that the forwarding company in which the freight forwarder works has its own transport facilities. In such situations, the freight forwarder will support specific individuals who transport goods.

Customers and partners of an organization using freight forwarding services

Thanks to the activities carried out by the forwarder, the organization can effectively coordinate the activities of the business processes in its value chain, and the supply/industry chain in which it operates. This efficiency can translate into lower costs and, as a result, more competitive prices for products and services.

It can also translate into a correspondingly high level of quality of service offered to customers. Well-designed forwarding processes provide an organization with a unique value proposition.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

High quality customer service in terms of on-time delivery

The Freight Forwarder provides an agreed level of service quality in terms of cost and timeliness and delivery.

Cost optimization of outsourcing freight forwarding

Customers of the forwarder are sure that they do not overpay, because they always pay the market price. When the price goes down, the customer automatically pays less. Does peace of mind have its price?

It establishes a long term business relationship with the assurance that the price for the service is fixed and actually getting lower as part of the loyalty program and volume growth.

Savings in the execution time of processes related to freight forwarding

Using the services of a freight forwarder allows the company to achieve savings in process execution time: It frees up its time by dedicating it to strategic business management;

It saves its time or the time of its employees because the freight forwarder takes on the responsibility of finding the best market offer and negotiating prices on behalf of the customer.

The biggest advantage of cooperation with a forwarding company is the fact that the entrepreneur can fully devote himself to the most important activities from the business point of view, and entrust all formal matters to the forwarder. He will take care of finding new orders, as well as establish conditions of carriage with customers, which will significantly reduce the burden on the entrepreneur. The tasks of the forwarder also include maintaining constant contact with warehouses and contractors, including foreign ones. Additionally, a professional forwarding agent is up to date with all legal issues applicable in a given country, and thus the entrepreneur is not obliged to constantly update his knowledge in that matter. Another very important advantage of working with a forwarding agent is the fact that you do not have to be available for your drivers all the time because they are taken care of by a forwarding agent. He will also solve any problems that may arise during the delivery. This is a significant relief from the most difficult duties and at the same time it is also an opportunity to reduce the level of stress, which is unfortunately an inherent aspect of running a business.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
    1. How will potential Customers discover how you can help them?
    2. How will they decide whether to buy your service?
    3. How will they buy it?
    4. How will you deliver what Customers buy?
    5. How will you follow up to make sure Customers are happy?

Channels
How you deliver

Meetings

The freight forwarder works with clients with whom he holds meetings to clarify many issues related to the services performed.

The success factor in this profession is therefore efficient communication and collaboration within a team that collectively sets the vision for the network infrastructure and then executes it. Consequently, face-to-face meetings with business stakeholders and team members have become very common. During such meetings, the forwarder can justify the decisions made and communicate the vision for the organization of the forwarding-related processes.

Documentation prepared by the freight forwarder is essential in order to comply with regulations and maintain a sufficiently high level of quality in the forwarding process. The most commonly developed documentation includes the following categories:

Forwarding order - it should be treated as a form of contract. If the contract of carriage was not concluded, the forwarding order is a binding document.

The Freight Forwarder has the right not to accept the order, but he has to do it immediately after receiving it. If he fails to do so, the contract is considered to be concluded. It specifies what activities should be performed by the Freight Forwarder (e.g. customs clearance, quantity and quality control of goods, insurance, storage). There is no uniform, fixed form of a forwarding order. When creating it, one should be guided by the scope of information that the freight forwarder must have in order to properly, reliably and accurately perform the forwarded task. We distinguish framework and one-time forwarding orders. One-time orders refer to the organization of transport of only one cargo. A framework order specifies activities which will be repeated while organizing forwarding services for the whole batch of a product.

Based on the shipping order, the freight forwarder prepares a shipping instruction with detailed information and sends a copy to the exporter.

Channels
How you deliver

The contract of carriage - the document on the basis of which the service of transportation of people or goods to a specified place at a specified time is provided. It is concluded between the carrier who will provide a transport service and the customer who is obliged to pay for the transport. The carrier is obliged to perform the service in accordance with the contract, and the person commissioning the transport to pay the agreed amount on the agreed date. There is no one, pre-imposed form of the contract of carriage. Its appearance, included data and provisions, as well as additional information are the matter of agreement between the parties. For the safety of the principal and the contractor, it should contain information that will help to settle disputes that may arise in connection with improper behavior of one of the parties.

Forwarder's Certificate - a document issued by a forwarder in which he confirms that he has accepted the goods (type, quantity, packing method).

In this document, he also undertakes that he will ship the goods to the address provided by the principal or deliver the goods to the consignee.

Issued in one copy to the shipper. Transfers material responsibility for the cargo to the freight forwarder. It is a universal document and can be used in all modes of transport (road, air, rail, water). There is no ready form of the Freight Forwarder's Certificate, therefore the certificates issued by the companies may differ from each other, but the information contained in them will always be very similar.

Routing order - a document that is currently only transmitted electronically. The original is sent to the foreign exporter. The importer forwarder passes the orders to the correspondent forwarder to deal with the shipment of imported goods. This allows the shipment to be handled by a forwarder who is on the spot and can take care of all the formalities. The Routing Order contains detailed information about the goods, the method of shipment, and the documents necessary for transport to another country.
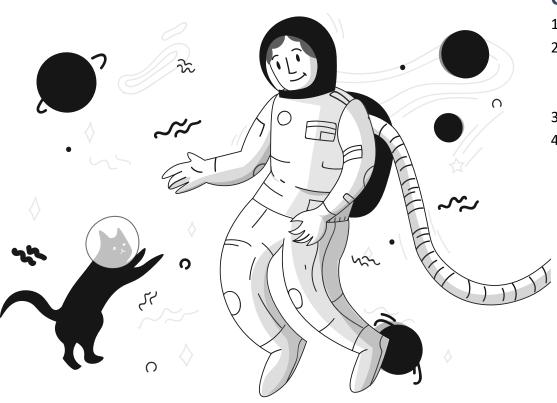
Channels
How you deliver

Shipment instruction - a document issued by the Freight Forwarder based on the customer's order. It contains all necessary information for the client on preparation of goods for loading/shipment. A waybill (domestic or international) is prepared on the basis of shipping instructions. It enables the shipper to place the goods on the selected vehicle in an appropriate manner and at the designated time, taking into account all features of the transported cargo. The exporter is obliged to follow all instructions contained in the document. Otherwise, he will have to bear the costs resulting from incorrect way of shipment transportation. It enables the shipper to place the goods on the selected vehicle in an appropriate manner and at the designated time, taking into account all features of the transported cargo. The exporter is obliged to follow all instructions contained in the document. Otherwise, he will have to bear the costs resulting from incorrect way of shipment transportation.

Electronic communication
The forwarder can also communicate the results of his work by e-mail, online messaging or through a software platform that supports collaboration and teamwork. When stakeholders are geographically dispersed communication often takes place via videoconferencing (appear.in, skype), during which problems and proposed solutions are discussed. An important element of the forwarder's electronic communication environment is a repository of documentation to which all involved parties have access (including access rights).
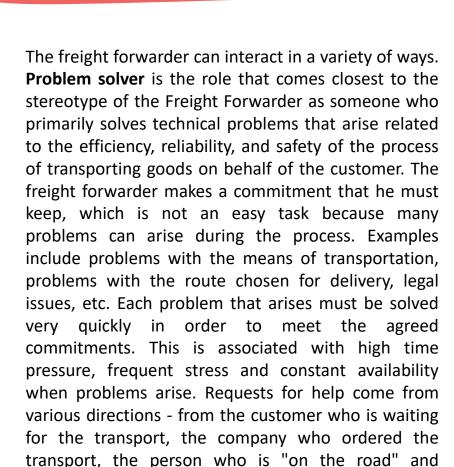
Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" - written communication (e.g. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

The freight forwarder can interact in a variety of ways. **Problem solver** is the role that comes closest to the stereotype of the Freight Forwarder as someone who primarily solves technical problems that arise related to the efficiency, reliability, and safety of the process of transporting goods on behalf of the customer. The freight forwarder makes a commitment that he must keep, which is not an easy task because many problems can arise during the process. Examples include problems with the means of transportation, problems with the route chosen for delivery, legal issues, etc. Each problem that arises must be solved very quickly in order to meet the agreed commitments. This is associated with high time pressure, frequent stress and constant availability when problems arise. Requests for help come from various directions - from the customer who is waiting for the transport, the company who ordered the transport, the person who is "on the road" and delivers the transported goods, etc.

Consultant | Advisor

Experienced forwarding agents with wide domain knowledge can act as consultants, helping companies to optimally organize logistics processes. In case of large organizations they can also support the management in planning and organizing the entire supply chain or the strategy of cooperation with business partners within the enlarged company. Logistics processes of companies are a critical element of their value chains and have a direct impact on intra-organizational and inter-organizational efficiency in the economic chain and the level of quality of cooperation with business partners and customer service. This in turn translates into the value proposition of a given company. The role of a consultant is related to assisting both the companies commissioning transport and those offering such services. An experienced consultant can also advise less experienced associates who do not have sufficient skills.

Customer relationships
Roles/Relationships

The role of the **liaison** to act as an intermediary between the various nodes of the supply chain by transmitting relevant information and coordinating activities in a manner leading to the optimal implementation of the objective - the delivery of goods at an agreed time and cost. An example of the coordination chain may be the company - freight forwarder - transport company - the customer of the company - freight forwarder.

For each role, the foundation of the relationships built is efficient communication and the quality of the tasks performed.

The most valuable form of communication is of course face to face. However, due to specificity of forwarder's work environment most of communication is done by phone and supported by electronic communication environments - teamwork systems, videoconferencing, e-mail etc. Randomly occurring problems to be solved, required time for solving them and decentralization of problem locations make it difficult to conduct planned communication.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - ADVICE,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

Associates
Forwarder's activities are a subset of activities performed within the set of processes abbreviated as TLS. Consequently, he must efficiently coordinate the work, which requires close cooperation with associates.

Carriers
The key partner of the forwarder are carriers. In the case of land transport, these are transport companies whose task is not only to transport the goods of various types, but also to prepare the means of transport and the appropriate conditions and transport documents. This is an integral part of the implementation of transport. Therefore, transport companies are inherent in forwarding. There is also the option of air transport. Nowadays, almost any type of goods are transported by airplanes, especially HVTT (High Value Theft Targeted) goods of high value (e.g. electronics) and those that must reach their destination in a very short time.

Some of the major commodities transported by air include mail, industrial supplies, pharmaceuticals, perishables and animals.

Business Stakeholders
Persons involved in the activities related to the forwarding, both on the side of the forwarder's company, as well as transport company and the company ordering the service (customer), are a very important source of information and feedback that allows the forwarder to take action efficiently and on time. Thanks to the stakeholders, i.e. persons who have an interest in the tasks performed by the freight forwarder, he receives current information regarding the level of service quality required by the customer and the costs as well as limitations related to the capabilities of subcontractors (transport companies).

Key Partners
Who helps you

If the forwarder's scope of work includes new solutions not yet fully recognized that will be used in forwarding, then the company may temporarily hire Field Experts related to a specific technology. These individuals have very specialized knowledge and help solve problems that arise or provide training.

Freight Forwarders Associations

International Federation of Freight Forwarders Associations (FIATA). International Federation of Freight Forwarders Associations (Federation Internationale des Associacions de Transitaires et Assimiles).

It was founded in Vienna on May 31, 1926.

It is a non-governmental membership organization that represents the interests of freight forwarders in about 150 countries (about 40000 forwarding and logistics companies). FIATA is a reliable source of information on logistics and forwarding industry regulations.

Through documents developed by the Federation, which are recognized almost all over the world, trade facilitation for all workers in the industry is promoted. It represents the interests of all its members by cooperating with UN agencies, trade and transport organizations, the World Trade Organization, governments of many countries. FIATA's headquarters are located in Geneva, Switzerland.

FIATA's five primary goals:
- uniting the logistics industry,
- To promote, represent, protect the interests of the industry,
- Unifying and improving the quality of services provided,
- vocational training for industry employees,
- To introduce the public to the nature and importance of the industry.

UFO Universal Freight Organisation
Established in January 2000 in the United Kingdom to provide independent freight forwarders with access to the world's best agents who can handle their shipments safely and professionally according to a strict code of conduct.

Key Partners
Who helps you

It is an elite group of independent freight forwarders in 99 countries around the world. Its members must enjoy an excellent reputation, get accreditation from international authorities and pass a very rigorous recruitment procedure. Every two years, the Organization's members meet to develop business in the spirit of UFOs. Although the organization has a worldwide scope, it offers its clients local service in the field of warehousing, insurance, customs clearance, handling of oversized and dangerous goods, or transportation by all available branches (air, sea, land).

CLECAT- European Association of Carriers, Transporters, Freight Forwarders and Customs Agents

It was established in 1958 and its headquarters are located in Brussels. It represents 20 organizations from forwarding and logistics sector, associating almost 20 thousand companies from the area of European Union.

Works with FIATA and other organizations to unify and simplify regulatory solutions for the TFL industry.
CLECAT's main objectives:
- protection and representation of the Transport - Freight Forwarding - Logistics industry in Europe
- cooperation and advice to the European Commission in drafting and revising European legislation on customs clearance, transport and forwarding
- Cooperation with and representation of FIATA in the European Union.

ICT providers

The complexity of the tasks performed by the forwarder, e.g. planning, route optimization, searching for alternative routes in case of problems that have arisen, the amount of processed information and the dynamics of interaction with various entities involved in the process cause that appropriate IT systems have become an indispensable piece of equipment in the forwarder's work.

Key Partners
Who helps you

Providers of such solutions offer users - forwarders support in case of software problems, training, and maintenance of such solutions.

Transport exchanges and their functions

The range of products on transport platforms (freight exchanges) is wide. It consists not only in matching the needs of transport and forwarding services or the demands of trading and manufacturing companies. The functions of the available freight exchanges also facilitate the planning of loading activities and monitor the flow of goods between the places of shipment and receipt in real time. Increasingly, the platforms are linked to IT tools that are used to determine the position of a vehicle over a defined period of time. The use of an exchange is not just a matter of looking for savings - the implementation of a system is slowly becoming a necessity.

Now, to become an international partner, you also have to work on transportation platforms.

During peak periods, the winners are those who can place their orders quickly and efficiently with a large group of reliable hauliers or who contract firm orders well in advance. The use of freight exchange systems can secure long-term orders and optimise fleet utilisation.

Key transportation platforms:

http://www.timocom.pl/

http://www.trans.eu

http://www.wtransnet.com

http://teleroute.pl

The functions of the individual freight exchanges can be tested in a free, no-obligation trial. This test will allow you to get to know the system and its quality in order to choose the right program for your needs.

Revenue and benefits

Revenue and Benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

High Earnings

Working as a freight forwarder can be associated with really high salaries. The best ones can earn several thousand PLN. Most forwarding agencies settle work on a base + commission basis. The basis is really different, depending on the experience of a given employee. However, people starting work have to reckon with the base within the limits of the lowest national currency. And now the most important thing, the commission. Its amount depends only on your commitment, experience and luck (often also on connections). But in case of people who are just starting the most important thing is definitely engagement. As far as the commission is concerned, it is an individual matter for each company.

Recognition and prestige

Because it is so important to an organization's market success, the position of freight forwarder is often considered crucial.

Soft benefits

For work, we need a phone, a laptop and constant internet access. That is, something most people can't imagine living without these days. Of course, we can discuss the productivity of work at home and in the office. However, probably many people would like to get out of bed, make a cup of coffee and start work without leaving home. In shipping - although it is not common - such a possibility exists. Everything depends on the policy of the company and the relationship with the employer.

A growth-stimulating work environment

When you come to work, you don't know what to expect. You can finish everything to the last button, and still be delayed because of too long loading, unloading or unexpected car breakdown. Every day you have the opportunity to meet new people, be they carriers or customers. Another advantage of this job is that you can work with customers from all over Europe, which gives you the opportunity to grow even faster. Transportation is such a broad topic that we are able to learn something new every day.

Revenue
What you get

A sense of accomplishment and satisfaction

There are orders or transports, where you have to be very committed to "satisfy" the customer and complete the whole transport without any problem. There are orders where the driver learns from the documents on loading that he has to go to a completely different place than initially planned. There are also transports with several, or even more unloadings. One delay or mistake is enough to cause serious problems. However, when the goods arrive at the destination without any problems or when we are able to rise to the challenge and deal with them quickly, then it really brings great satisfaction.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Need to develop quickly and stay up-to-date

The efficient execution of tasks associated with TFL requires investment in the continuous development of skills and knowledge. This in turn requires a lot of time and full focus and commitment.

A demanding multi-tasking job

The work of a freight forwarder involves constant analysis and problem solving under intense focus and time pressure. This type of work is very exhausting. Practice quickly disqualifies those who cannot handle a large number of activities to be performed at once. Multi-tasking is an essential skill for performance. At the same time, such specificity of work is closely related to occupational risk. Simultaneous handling of dozens of loads per day for a person not accustomed to this mode of work can lead to errors. Unfortunately, in this profession, even small mistakes (such as a mistake in the dimensions of the load, which in other circumstances would be called a "typo") can have serious consequences.

Constant availability

Freight Forwarder has to solve problems very quickly. Of course he tries to be proactive and prevent problems by taking preventive measures, but when a problem occurs he must immediately start to analyze and solve it. Very often he has to work outside of the formal working hours or during weekends to "extinguish" emerging "fires".

Stress

Typical tasks of a freight forwarder are performed **under time pressure**, which is a source of great stress. Another source of stress is the very high responsibility of the freight forwarder for customer satisfaction.

The need to skillfully combine multiple tasks

An additional difficulty of the work of a forwarder is combining the efficiency of operation with highly developed interpersonal skills. Negotiation skills, professionalism, ability to define and specify the client's needs, trust and willingness to cooperate on the part of the carriers - all this will contribute to the result in the form of margin or the number of realized orders.

Golden Reads

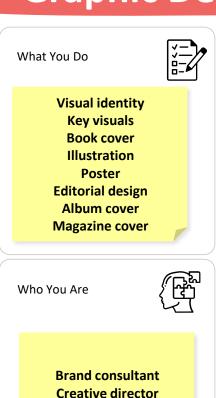|	5 GOLDEN READS FOR FORWARDER	LINK AMAZON
#1	McCarthy, A. (2017). *Freight Forwarder Business Startup: How to Start, Run & Grow a Successful Freight Forwarding Business*. Valencia Publishing House.	https://www.amazon.com/Freight-Forwarder-Business-Startup-Successful-ebook/dp/B01MTGA7O6
#2	Varun, S. (2019). *A Practical guide to Shipping & Freight Forwarding: Your key to success in the shipping industry.* Independently published.	https://www.amazon.com/Practical-guide-Shipping-Freight-Forwarding/dp/1671779029
#3	Wurst, C., & Graf, L. (2021). *Disrupting Logistics: Startups, Technologies, and Investors Building Future Supply Chains (Future of Business and Finance).* Springer.	https://www.amazon.com/Disrupting-Logistics-Startups-Technologies-Investors-ebook/dp/B08VDDKC58
#4	Wang, X. (2014). *Operational Transportation Planning of Modern Freight Forwarding Companies: Vehicle Routing under Consideration of Subcontracting and Request Exchange*. Springer.	https://www.amazon.com/Operational-Transportation-Planning-Forwarding-Companies/dp/365806868X
#5	Glass, D. (2013). *Freight forwarding and multi modal transport contracts*. Informa Law from Routledge.	https://www.amazon.com/Freight-Forwarding-Transport-Contracts-Maritime/dp/1842145959

Personal Business Model Canvas

Graphic Designer

Author: Patrycja Longawa, Michał Dyjakowski (UITM)

Graphic Designer | Personal Service Model

Who Helps You

Illustrators

Photographers

Programmers

Animators

3D designers

Web developers

Editors

Lawyers

What You Do

Visual identity
Key visuals
Book cover
Illustration
Poster
Editorial design
Album cover
Magazine cover

Who You Are

Brand consultant
Creative director
Art director

Benefits You Offer

Analysis

Idea

Narrative

Directions

Concepts

Visual language

Process control

Implementation of the project

Roles/Relationships

Consultant
Visioner
Revenue „Creator"

Who You Deliver

E-mail
Social Media
Meetings

Who You Help

Culture

Film

Education

Press

Music

TV

Internet

Art

Costs and Consequences

Thinking
Taste
Something Artificial Intelligence can not invent

Compensation and Rewards

You are decisive

You negotiate your money

You are your own brand

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Personal Key Resources

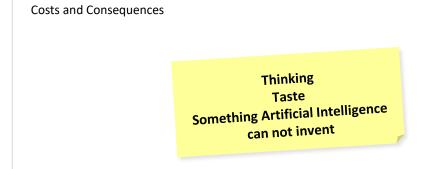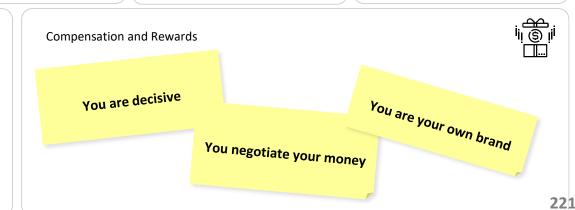**Personal Key Resources include who you are:**

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Roles & Skills
Who you are

You create modern visual communication, everything that people buy, look at, touch, read - moving seamlessly between the final world of print publications and the virtual space.

You match the language of communication to the archetype that is the subject of the project. As a designer you have to get into character like an actor - a mentor, a ruler, a laughing stock - then you visually interpolate the results of your observations, this gives authenticity to your work. This is your visual language that you create. Each project is a story that you communicate to the world in a universal language of colours, forms and characters. In addition to creativity, innovation, technical and artistic skills, a graphic designer should also have an understanding of the business, legal or marketing environment.

You are aware of the commercial role of design and of the usefulness of marketing tools, but as a responsible creator, you see the human being instead of the target group.

To paraphrase Cormac McCarthy, the work of a graphic designer consists of the work of millions of other graphic designers. That's why it's good to develop the habit of looking, of observing things: writing on walls, bus tickets, clothes, adverts, trees and all the rest.

The designer draws inspiration from films, books, music, sociology, political science, the current situation in the country and the world. Not all projects are very inspired, some simply need to be done to the best of one's ability without feeling particularly inspired. Design is often also about solving problems rather than inspired creation. Of course, this is by no means mutually exclusive, especially since applied art and higher art have long since shed the wall between them, making the boundaries fluid.

To draw inspiration is to look for an answer to a similar design problem you have been asked, but mainly to answer it in your own, perhaps more interesting way.

FOMO (fear of missing out) - daily dose of inspiration from all areas - cultural contexts.

Skills & Abilities
Who you are

Communication skills

Preparing a visual communication project is a process in which the designer responds to the brief and (or only) to the real needs of the commissioning party. A process in which the designer and the commissioning party are in constant dialogue, can learn from each other and respect each other's competences. And where both parties feel comfortable, safe and everyone is an expert in their field - the commissioning party knows the industry they are in and the designer knows how to design.

Ability to work in a team

A well-run process has a budget and time frame and requires a prepared team. At the same time, substantive preparation, experience and competence should be provided by both parties - the commissioning party and the designer.

Assessment of the customer's real needs

Design is understood here as intentional, effective action to achieve a measurable effect on the target audience. The aesthetic satisfaction of the designer himself and the client is desirable, but it is not the proof of the effectiveness of the design.

Holistic approach

A working visual system (i.e. one that effectively communicates the brand identity and at the same time its use on the part of the brand owner is simple and easy to understand) consists not only of the logo and its variants, the colour scheme and the typography used, but also the firm's materials (activities and the visual lineage of the brand - its graphic language. To be able to evaluate a design, you need to see it applied in practice so that you can see whether it works as a whole and not just as an isolated mark.

Research then process

Above all, the designer is expected to gather all the material (research) on existing communication, the market, the competition, as well as setting goals for the brand. In cases where the strategy has not been prepared beforehand and presented as part of the design brief and is part of the branding process, it is good for the designer to be involved in the brand design process from the beginning.

Skills & Abilities
Who you are

Style - creative language = a way of expressing oneself.

What Defines Your Style:
- Topics - (psychology, history, everyday life,
- social engagement, dialogue with art history, etc.),
- tools - technique (ink, vector, cut-out, collage,
- paint, textures, manual + digital),
- elements - (iconography, visual language), colour scheme.

Illustration - is an artwork made on the basis of a given text (literary work, article, brief, advertising slogan, etc.). The task of the illustrations is to supplement, clarify, interpretate, add to the text and also to evoke emotional states that enhance the effect of the text. The concept of the second bottom of the meaning layer of the image is often used here.

Client - publishing houses, art directors, industries mentioned at the beginning of the presentation.

Clients choose you by your portfolio and what defines your style, your styling. It is a connected vessel, because then the illustrations made in collaboration with the client land in your portfolio, which is how the visual branding of a graphic works.

Illustration Media:
- Poster,
- press,
- Publishers,
- clothing, product,
- the internet, or the whole world.

A key task of the graphic designer is to adapt the work to the technology of the target medium.

Process:
- brief: content of book/article, age of audience, format, number of works, budget, deadline,
- research: similar illustrations already created, what do you know about the subject, what is your attitude to the content,
- Sketch: colour scheme, composition outline, original idea.

Skills & Abilities

Who you are

License:

- Exclusive / non-exclusive,
- for an indefinite / time-limited period,
- global/territorially defined,
- scope of fields of exploitation,
- possibility of sub-licensing,
- Collaboration using your name (use of your image).

All these factors affect your earnings, from X amount, up to as much as 100 X.

Skills & Abilities
Who you are

Pros and cons of working as a freelancer and running your own studio

FREELANCER DISADVANTAGES	FREELANCER ADVANTAGES	STUDIO MINUSES	STUDIO PLUSES
• Independence	• Independence self determination	• Lack of rapid response	• Shared responsibility
• Lack of fresh eyes	• Responsibility only for oneself	• Dependency	• Natural brainstorming
• No brainstorming		• Responsibility for others	• Social aspect
• It is difficult to get new ideas to come out of your own "bubble"	• You only choose designs for yourself		• Learning together (from each other)
		• Compromises	
	• You cultivate your own style and design potential	• Lack of development opportunities	• Error control
	• Possibility to build personal brand		• Family atmosphere
	• You can make your mistakes		

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

STAGES	WORKING RANGE	VALUE	WORKING DAYS
Familiarization meeting	Deepening the issues in the brief - you don't need to prepare anything, you want to discuss the issues in the brief.		
1. Analysis	Competition - analysis of communications (visual and linguistic) of competing firms. Analysis of the logo and communication (visual and linguistic) of the brand (relationship between the brand and the competition), Assumptions for communication (visual and linguistic).		7 working days
2. Assumptions for the narrative, main idea	Narrative - what and how we should talk about the brand, Go / don't go, inspiration (competitors + pinterest). Working suggestions for the directions that branding can develop into. Main idea, tone of voice and overall style.		7 working days
3. Preliminary binding directions brands, narrative	Initial directions for the visual language of the brand - color scheme, lettering, layout, use of photographic and illustrative material presented on selected visuals, Narrative - the premise and development proposal - what and in what order we should talk about the brand to specific audiences.		8 working days
4. Development of the concept, logo	Development of selected creative directions, logo concepts, consideration of comments. Presentation on a wider range of materials.		8 working days
5. Final concept	Scope of final creation: ▶ Logo, ▶ key visual / style guide: typography, colour scheme, layout, ▶ use of logo and identification elements, ▶ selection of photographic, iconographic, illustrative material, Creation presented on sample ppt views, brand portfolio presentation, sample graphics for social media, web introduction		8 working days

Value proposition
Benefits you offer

STAGES	WORKING RANGE	VALUE	WORKING HOURS
6. Implementation (choosen examples)	Working range		
Set of elements	▪ Logo design, protective field, colours, variations, sizes + one-page application specification,		30
	▪ Typography / iconography / infographics / illustrations,		To be determined
	▪ Motion design,		To be determined
	▪ Photo material - moodboard, session guidelines,		15
	▪ Copywrite - texts about the company, offer, technology, products etc.,		24
Digital communication	▪ Cover photos, avatars in social media		8
	▪ Graphic design of communication in social m.: Instagram, Facebook, LinkedIn, twitter. Open files of thematic series templates,		42
	▪ Newsletter - template design,		10

Value proposition
Benefits you offer

STAGES	WORKING RANGE	VALUE	WORKING HOURS
6. Implementation *cont.*	Working range		
Office	▪ Business cards,		5
	▪ Sales deck - narrative, graphic design, template preparation,		42
	▪ Offer – template		8
	▪ Elements of branding in the office - concept of signage,		32
	▪ Elements of branding in the office - technical preparation of projects (dimensioning, ergonomics, logistics),		
			15

Value proposition
Benefits you offer

STAGES	WORKING RANGE	VALUE	WORKING HOURS
6. Implementation *cont.*	Working range		
WWW	▪ Verification of current mock-up to strategic assumptions, verification of content, texts for the web		8
	▪ Graphic concept - homepage, technology,		30
	▪ Animations / interactions - homepage, BI sub-pages, AI, Conversational design - concept,		
	▪ Final design - About us, Careers, Enterprises, AI, BI, CD, RWD, interaction project,		40
	▪ Front end		46
	▪ Back-end		40
	▪ CMS		40
	▪ Content management - preparing graphics, photos, filling the website with content,		24
Copyright	▪ Transfer of copyright without territorial and time restrictions / 10% of the creation		

Value proposition
Benefits you offer

Brief due to its advantages - low cost of preparation, speed of obtaining information, comprehensibility – this is a great tool to start the work. We are talking primarily about branding projects with impassable deadlines (brand creation of events, festivals, conferences) and about projects whose creator is to be selected in a tender. And also, about small-scale projects. Brief can also prove helpful in processes, whose implementation is, for various reasons, heavily delayed and which require quick final design arrangements.

1. BASIC BRAND INFORMATION
What is the name of the brand? How long has the brand been in existence? How many people make it up?

2. GENERAL DESCRIPTION OF THE COMPANY
A few sentences about what the business is about

3. TARGET MARKET
In which product/service category does your brand? In what geographic area?

4. BRAND SITUATION
How do you assess your brand's current positioning relative to your competitors?

5. TARGET GROUP
Describe the brand's ideal customers in a few words.

6. CONTACT POINTS
How customers most often interact with the brand: at events, using customer service, buying a product and using it...?

7. CHANNELS OF COMMUNICATION
What channels the brand uses to communicate with customers: TV commercials, social media activity, emails, podcasts...?

8. PROJECT OBJECTIVE
Define the biggest challenge you want to set in front of the project team.

Key actions
What you do

- visual identity
- key visuals
- brand consultant
- creative direction
- art direction
- editorial design

- album cover
- book cover
- magazine cover
- poster
- iconography
- Illustration

- packaging
- naming
- website
- print production
- infographics
- social media assets

Analysis → Assumptions for narrative, the idea → Preliminary directions, narrative → Develop concept → Final concept → Implementation

Value proposition
Benefits you offer

9. SCOPE OF THE PROJECT
How much support do you expect from the project team? what are the needs? Indicate the needs identified so far that the branding/rebranding is intended to meet.

10. STUDIES HELD
Does the brand have a strategy? Does the firm have a strategy marketing? Do you have any studies on the market or the target group of the brand?

11. MATTERS REQUIRING ATTENTION
Are you able to identify aspects of the project on which you
should contractors pay particular attention?

12. WORKING GROUP
What kind of people will be involved in the project Who will be responsible for the management and success of the project Who will be responsible for the running and success of the entire project?

13. INTERNAL SUPPORT
Does your firm have teams or individuals responsible for the marketing and design of graphic materials, who will take over the implementation of the project once it is completed?

14. DECISION-MAKING PROCESS
How and in what group will be undertaken final decisions?

15. DEADLINE
What is the deadline for implementing the project in life?

16. EXPECTED ANSWER
What kind of feedback do we need from the contractor-
are you willing to cooperate?

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

In the last decade of the 20th century, the Internet contributed to an exceptional acceleration in the exchange of information. It has changed the nature of human communication and democratized access to knowledge, but it has also become an unlimited marketplace for services, commerce and advertising. Never before have graphic designers had such volumes of market demand. Thanks to digital technologies, almost anyone could become signer', and it had a very negative impact.

Selected sectors:

▶ cultural
▶ film
▶ educational
▶ press release
▶ musical
▶ television
▶ food
▶ cosmetic
▶ sports
▶ banking
▶ publishing
▶ clothing

▶ telecommunications
▶ Online
▶ electronic
▶ programming
▶ artistic
▶ event
▶ urban
▶ tourist
▶ architectural
▶ Transport
▶ legal
▶ pro bono

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Element	Number of hours
▶ Preparation, research	10
▶ Mood board, concept work	10
▶ Preparation of two creative lines	30
▶ Refining one selected line - logo	20
▶ Matching color scheme, typography, proportions, sign rehearsal	15
▶ Sign book	10
▶ Design - brand graphic line - concept	25
▶ Refining the creative line - poster template	10
▶ Refining the creative line - flyer template	8
▶ Stocks - preparation of business card, returning the file, choosing paper and printing technique, ordering proofs	8
	5
▶ Stocks - letterhead - defined Word	
	151
▶ Total	

Key actions
What you do

Conversion of hours into money

The price includes the agreed (contracted) field of use. If the field of exploitation changes, e.g. from digital to press, you add about 20% to the basic price – the contract always includes the fields of exploitation agreed with the client. The transfer of property rights to the client is worthwhile (in the above-mentioned cases) if the work cannot be monetized (e.g. if it is too linked to the client's campaign theme); in all other cases, the work is.

151 hours × hourly rate (I assume this is EUR 35 net) = EUR 5 285.

On top of that, there is copyright:

▶ multiplier: exclusive rights (obvious in the case of branding) → 1.0,

▶ multiplier: geographic scope (0.2 locally, 0.3 regionally, 0.5 nationally, 1.0 worldwide - assume national scope) → 0.5,

▶ multiplier: legal time range (0.1 short time, 0.3 unlimited, which I take into account) → 0.3,

The sum of the multipliers is 1.8. The valuation will therefore consist of the product of the base and the multiplier. We arrive at the following net amount: EUR 5 285 × 1.8 = EUR 9 513.

Mentioning a single sum tells the client nothing - it is worthwhile to have a good breakdown and discussion of what they are paying for.

Rates for single orders (net prices):
▶ Simple illustrations for the press - from EUR 112,
▶ Press folder - from EUR 200,
▶ Press cover - from EUR 225,
▶ cover art for a music album - from EUR 335,
▶ Cover concept - from EUR 555,
▶ key visual advertising / commercial posters - from EUR 445 – 665,
▶ Graphic series / cooperation with brands - from EUR 1 112 – 2 225,
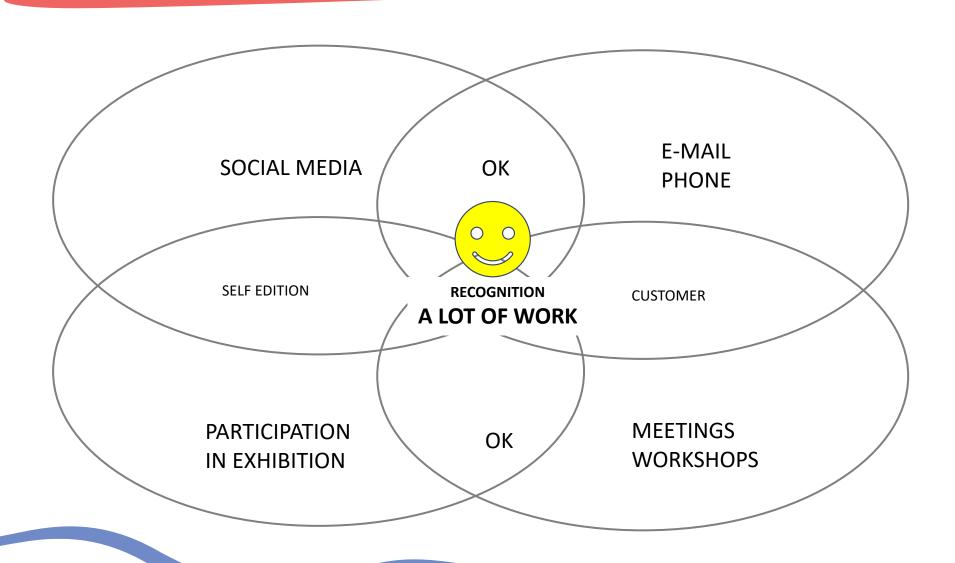▶ creative directing / art directing / post-production - from EUR 2 225.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
   5. How will you follow-up to make sure Customers are happy?
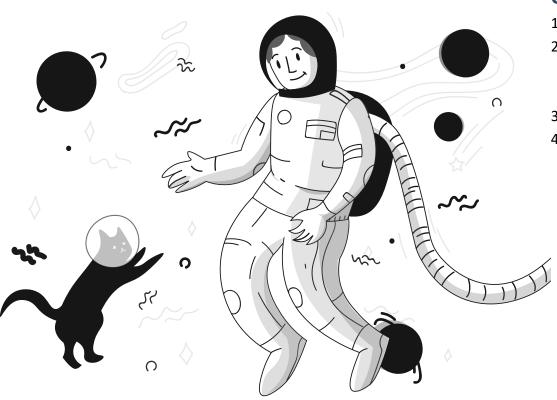
Channels
How you deliver

SOCIAL MEDIA

OK

E-MAIL
PHONE

SELF EDITION

RECOGNITION
A LOT OF WORK

CUSTOMER

PARTICIPATION
IN EXHIBITION

OK

MEETINGS
WORKSHOPS

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

Interactions – Business analysis of customers

It is good practice to divide your tasks into:
- meetings, workshops, consultations - often billed hourly or as packages of hours to be used,
- work on materials - billed per work and a fixed, agreed amount
- additional amendments, etc. - billed on an hourly or task-based basis.

Ways of communicating or making comments are also important. At the same time, an overabundance of collaboration tools makes work more difficult. The optimum set-up to keep work flowing is a task management programme shared with the project team, meetings and an inter- net communicator.

You need to establish a way of giving feedback, e.g:
- feedback given live, after presentation, at regular meetings; collected in the form of a post-meeting summary - the studio iteration (i.e. a set of amendments) is presented at the next live meeting;

- descriptive feedback, sent via email -

  it is good to set up the possibility of

  a phone call right away to clarify;

- detailed feedback on the projects on the file

  itself in the comments - useful if the

  comments are minor and merely clarifying.

Customer relationships
Roles/Relationships

MARKETING STRATEGY

Refers to the overall marketing activities of the organisation, i.e.
making its activities, products or services relevant to its customers' needs. The marketing of each organisation must derive from its business model, or business strategy, which makes its activities in the various fields (e.g. production, finance, employment, etc.) coherent.

BRAND STRATEGY

Defines the nature of the brand and its relationship with the market (customers and competitors). In the broadest terms, it should include:
▶ the way a particular brand presents (positions) itself in the market relative to its competitors,
▶ the distinctive features to which it is intended to refer,
▶ Assumptions about the specific qualities it is intended to convey to the audience (functional, emotional) and the means of communicating them.
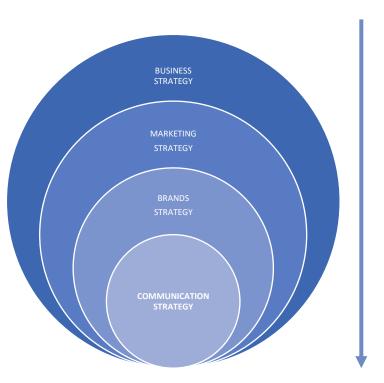
COMMUNICATION STRATEGY

It presents the tools and channels used
by the brand (organisation, product, person) to establish and maintain contact with the customer. In other words, it determines the methods of action to disseminate an understanding of the brand's objectives to customers, e.g. social media activities, advertising campaigns, public relations activities.

BUSINESS STRATEGY

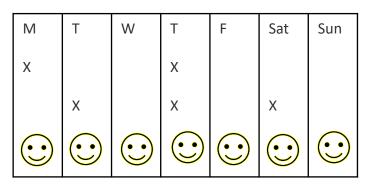MARKETING STRATEGY

BRANDS STRATEGY

COMMUNICATION STRATEGY

Customer relationships
Roles/Relationships

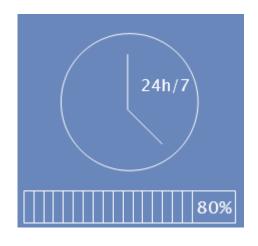**Interaction–customers see your customers (you work and develop recognition as a designer at the same time)**

SOCIAL MEDIA

INSTAGRAM

MAX 5 DAYS

M	T	W	T	F	Sat	Sun
X			X			
	X		X		X	
☺	☺	☺	☺	☺	☺	☺

GOOD PROJECTS

24h/7

80%

DONE IS BETTER THAN PERFECT

SHERYL SANDBERG

COMMUNITY INVOLVEMENT:

- ORGANISATION OF EVENTS
- PARTICIPATION IN EVENTS
- SOCIAL GATHERINGS
– PRO BONO PROJECTS
– CONSULTATIONS
– SPEAKINGS
- BOTTOM-UP INITIATIVES

PARTICIPATION IN COMPETITIONS

AS A JURY MEMBER

APPLICATION/ PARTICIPATION

Key Partners

Key Partners Include:
1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

▶ Art director (can be a best friend or give us sleepless nights),

▶ Copywriter (there is written content needed for the project that we, as designers, are not able to create, as this is also not our responsibility),

▶ UX designer (experience designer is very helpful and increasingly sought after in the market today),

▶ Printer (a multi-volume book could be written about the printer-designer relationship),

▶ Typography (we often need something individual and unique for a project, nothing makes a project stand out more than typography - it's about 90% of the design of every visual communication you view in a book, computer, phone, underground - everywhere),

▶ Editors, journalists (when working for the press and publications),

▶ Photographers (for various types of campaigns for musicians, fashion brands, the beauty industry or simply documentation-presentation of a finished project),

▶ Animators (with motion projects of all kinds, animated graphics are increasingly often the way to grab the viewer's attention),

▶ Programmers (for web, interactive and experimental graphics, all types of applications),

▶ Lawyers (legal assistance in writing contracts, concluding licences or in situations of copyright, property or intellectual property infringement).

Revenue and benefits
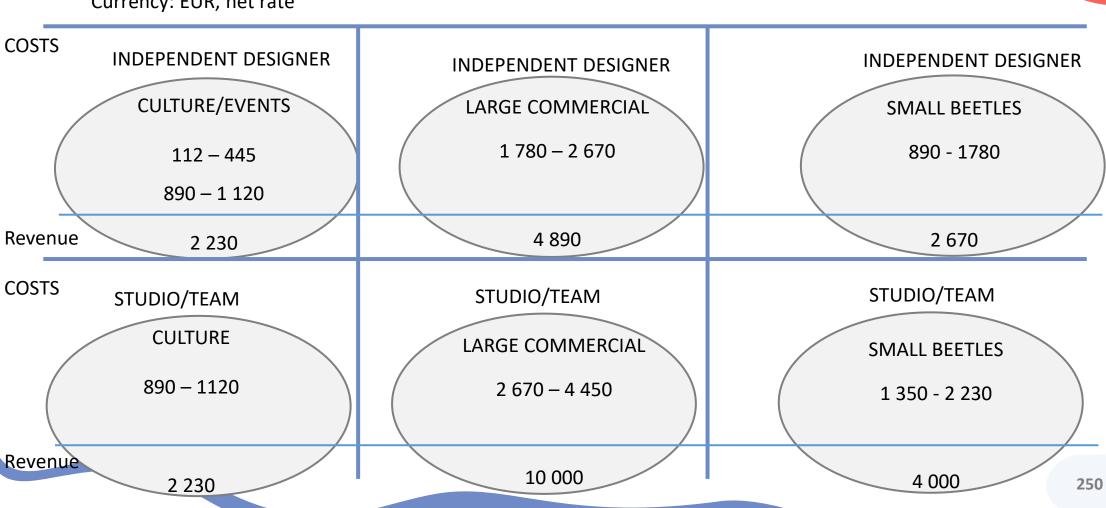
Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Revenues and costs (prices and costs of work on visual identity)

Currency: EUR, net rate

COSTS

INDEPENDENT DESIGNER	INDEPENDENT DESIGNER	INDEPENDENT DESIGNER
CULTURE/EVENTS	LARGE COMMERCIAL	SMALL BEETLES
112 – 445	1 780 – 2 670	890 - 1780
890 – 1 120		

Revenue

2 230	4 890	2 670

COSTS

STUDIO/TEAM	STUDIO/TEAM	STUDIO/TEAM
CULTURE	LARGE COMMERCIAL	SMALL BEETLES
890 – 1120	2 670 – 4 450	1 350 - 2 230

Revenue

2 230	10 000	4 000

250

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Sample price list and studio costs (EUR, net rate)

COMPANY STRATEGY - workshops, interviews, data analysis, report.

▶ 3 350 – 6 670, depending on the degree of development; this step can be skipped if the company internally analyses its business objectives, value proposition, target groups.

BRAND STRATEGY (visual and communication) - workshops, interviews data analysis, report.

▶ 4 450 – 6 670, depending on the degree of development.

CONCEPT OF VISUAL IDENTITY - 2 preliminary designs presented at client site.

▶ 2 230, depending on the degree of expansion.

FULL VISUAL IDENTIFICATION OF THE COMPANY - development of the selected project, development of the selected communication materials, proposal of slogans, transfer of logo files, transfer of copyright.

▶ 6 670, depending on the degree of expansion.

DIGITAL TOOLS PROJECT (www, applications) - key visual of digital products.

▶ 4 450, depending on the degree of expansion.

Costs
What you give

BUDGETING OF STUDIO WORK (EUR):

▶ 225 – 335 net / day of work of 1 person in the studio. This amount cover: social security, taxes, vacations, team salaries, people's work with external cooperation, equipment, licenses (programs, fonts),

▶ 4 450 / month - annuals, holidays, illnesses, corrections, remains:

　　▶ 3 12 / month

▶ 1 780 / month - graphic designer's salary, remains :

　　▶ 1350 / month,

▶ 890 / month - costs of renting and running the office (tidiness office, customer relations, accounting, legal services, conducting sales),

▶ 445 **/ month** - profit of the studio after subtraction all costs, with a team of five people this gives the amount

　　▶ 2 250 / month.

TIME IS MONEY:
▶ **Sign the contract.**
▶ **Keep track of your working hours.**
▶ **Plan for worst-case scenarios.**
▶ **Value yourself.**
▶ **Have another small job in mind.**

Golden Reads

	5 GOLDEN READS FOR GRAPHIC DESIGNER	LINK AMAZON
#1	Wheeler, A. (2017). *Designing brand identity: an essential guide for the whole branding team*. John Wiley & Sons.	https://www.amazon.com/Designing-Brand-Identity-Essential-Branding/dp/1118099206
#2	Müller-Brockmann, J. (1996). *Grid Systems in Graphic Design: A Visual Communication Manual.* Niggli Verlag.	https://www.amazon.com/Grid-systems-graphic-design-communication/dp/3721201450
#3	Bierut M. (2016). *How to*. Harper Design; Illustrated edition.	https://www.amazon.com/Graphic-Design-Things-Explain-Better/dp/0062413902
#4	Lupton, E., & Phillips, J. C. (2008). *Graphic design: The new basics.* Princeton Architectural Press.	https://www.amazon.com/Graphic-Design-Basics-Revised-Expanded/dp/161689332X
#5	Lupton, E. (2014). *Thinking with type: A critical guide for designers, writers, editors, & students.* Chronicle Books.	https://www.amazon.com/Thinking-Type-2nd-revised-expanded/dp/1568989695

Personal Business Model Canvas

Healthcare IoT Applications Developer

Author: Paulo Canário, Gastão Marques, Maria José Varadinov (IPP)

Healthcare IoT Applications developer | Personal Service Model

Who Helps You

Health professionals

Business Development teams

Product teams

What You Do

Communicating with the client
Performing industry research
Analysing client performance
Developing a strategy
Presenting ideas to a client
Strategy implementation

Who You Are

Bachelor's degree
Knowledge of data management
Communication skills
Problem-solving skills
Critical thinking
Collaborative skills

Benefits You Offer

Health solutions;
Health tools development;
Forecasting.

Insights to help the company:
Make the new solutions;
Address key challenges and concerns;
Identify new health problems.

Address:
Competition;
Changes in customer preference;
Improvements in:
        Technology;.

Roles/Relationships

Co-creation with costumers and health personnel to design tailored solutions for their health challenges, to generate value and succeed in a new digital era.

Who You Deliver

Health institutions
Public services
Seniors
People with health pathologies
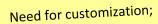
Who You Help

IT companies
Medical institutions
Public services
Manufacturing companies
Retail businesses

As long as there equipment be on the market.

Costs and Consequences

Need for customization;

Need to be constantly updating equipment

Compensation and Rewards

Senior IoT Manager
$156,123/yr
L3
 IoT Healt Manager
$131,400/yr

improving people's well-being.

Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities
Who you are

Personal health equipment is increasingly being implemented.

Areas such as diabetes, heart, physiotherapy, hemodialysis have more and more equipment for individual use that need to be managed.

Abilities and Soft Skills

- **Communication skills**:
    - Excellent verbal and written communication skills to clearly articulate the insights from findings to management and relevant stakeholders (health area);

- **Problem-solving skills:**
    - Intellectually curious individuals with strong creative and imaginative prowess to generate ideas to solve problems in health area;

- **Critical thinking:**
    - Strong critical thinking abilities to draw sound conclusions from information and various data sources at their disposal. It is crucial that they can separate relevant information from less vital ones with respect to solving a particular problem;
    - Capacity to analyse data objectively, applying logical thought and proffering solutions, taking a long-term perspective;
    - Attention to detail;

- **Comfort with ambiguity:**
    - Decision making involves some level of uncertainty, so it is important to be comfortable with ambiguity;
    - Need to be able to have to deal with human suffering

Skills, abilities

Who you are

Abilities and Soft Skills

- **Collaborative skills:**
    - Interpersonal skills;
    - Be able to work with cross-functional teams and have the maturity to interact directly with health area departments;
    - Provide leadership to teams on the implementation of strategic initiatives.

Skills, abilities
Who you are

Hard Skills

- **Education: a minimum of a Bachelor's degree in:**
  - Business Administration;
  - Computer Science;
  - Information Technology;
  - Information Management;
  - Economics;
  - Statistics;
  - Finance;
  - Engineering;
  - Health;
  - Or in a related field;

- **Knowledge:**
  - Health area;
  - Strategic planning;
  - Business case analysis and development skills;

Skills, abilities
Who you are

Hard Skills

- **Health care and diagnosis;**

- **Engineering mainly in the electronic, software and mechanical areas;**

- **Product design mainly in health and ergonomic areas;**

- **Strong quantitative and financial modelling skills:**
  - Work with large data sets to provide analytical support to all aspects of the health;

- **Computer skills:**
  - Possession of advanced excel skills and be proficient in PowerPoint for presentation purposes;
  - knowledge to work in the areas of apps;

- **Fluent in English.**

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Healthcare IoT Applications - these devices include several sensors, such as accelerometer, gyroscope, magnetometer, GPS receiver, among others that can help improve the quality of life.

The use of mobile devices has been intensified in recent years, mainly to support the various activities of daily living. These devices include several sensors, such as accelerometer, gyroscope, magnetometer, GPS receiver, among others that can help improve the quality of life.

It is intended to foster the connection between medicine and devices used daily, trying to use all its capabilities to improve the quality of life and social aspects.

The possibilities are all phases of the cycle of innovation and development of health applications, using low-cost equipment, being able to actively contribute to the development of this type of health-related solutions, applying and integrating the results of many different scientific and technological areas.

Key actions

What you do

- Understand the possible solutions for assisted living environments that can be developed;
- Develop a critical sense towards this type of solutions;
- Define new systems integrating different technologies;
- Have knowledge of programming for mobile devices in order to propose and develop new solutions;
- Understand the development and flow of data acquisition and processing methods obtained with mobile devices and sensors;

- Obtain knowledge about data classification in order to automate the processing of sensor data;
- Use several interconnected systems, either through a server or other mechanisms;
- Know the statistical methods to be applied at each stage of development;
- Know the legislation and regulations to apply to this type of solutions;
- Understand the concepts of usability in the development of the final product.

Customers

Customers

Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers

Who you help

Different industries and entities:

- Health companies developing and supplying health equipments and devices;
- Hospitals;
- Health services both public and private;
- Associations of costumers;
- Insurance companies;
- Governments;
- ONGs.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

- Definition, development and test of new Health solutions;
- Health tools development;
- Health services offer;
- Forecasting of new technologies and solutions.

Insights to help:
- Make new solutions;
- Address key challenges and concerns;
- Identify new health problems.

Address:
- Competition;
- Changes in customer preference;
- Improvements in:
  - → Technology;
  - → Health care systems.

Channels

Channels Include:

1. How customers know you
2. the app market and funding for new solutions.
3. how you deliver products/value
4. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
   5. How will you follow-up to make sure Customers are happy?

Channels
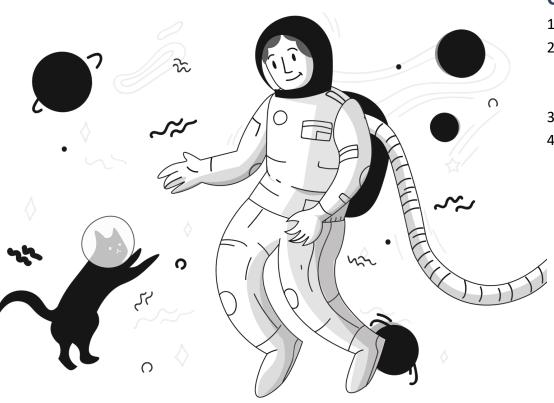
How you deliver

- Several ways to get a job or to offer your own products and services:
- Personal contacts;
- Recruitment sites;
- Freelancers' sites;
- Public tenders;
- Personal website;
- Social networks;
- Crowdfunding;
- Google's Play Store;
- Apple's Apps Store;
- Other Apps Stores;
- Technological fairs.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

Work with clients to develop an effective health solutions to maximize profits and create wellness solutions.

Co-creation with customers and users to design tailored solutions for their challenges, to generate value and succeed in a new digital health era.

Influence of customers to use new solutions and tools.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners

Who helps you

- Communication designers;
- Health companies;
- Health professionals;
- Mobile developers;
- Technological firms related to project´s needs;
- Freelancers' sites;
- Apps Stores;
- Public services.

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.
   - Satisfaction for creating and managing solutions in the health area.

Revenue
What you get

L2
IoT Health Senior
$156,123/yr
L3
IoT Health Manager
$131,400/yr

Average Years of Experience
0 − 1 **31%**
2 − 4 **58%**
5 − 7 **4%**
8+   **7%**

Not including years spent in education and/or training

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

- Some financial costs:
- Graduations' costs;
- Software's costs;
- Hardware's costs;
- Communications' costs;
- Advertising's costs.

- Permanent need for customization.

- Personal psychological costs:
- Many working hours;
- Less time to family and friends;
- Inherent to trial and error processes.

Golden Reads

	5 GOLDEN READS FOR HEALTHCARE IOT APPLICATIONS DEVELOPER	LINK AMAZON
#1	Kher, R. K., Paunwala, C., Thakkar, F., Kher, H., Paunwala, M., Sahoo, P. K., & Ladid, L. (2022). *IoT Applications for Healthcare Systems. Springer* International Publishing.	https://p-yo-www-amazon-com-kalias.amazon.com/Applications-Healthcare-Innovations-Communication-Computing-ebook/dp/B09YCFC9GQ
#2	Rani, S., Rajagopal, M., Kumar, N., & Shah, S. H. A. (2022*). IoT-enabled Smart Healthcare Systems, Services and Applications*. John Wiley & Sons.	https://www.amazon.com/IoT-enabled-Healthcare-Systems-Services-Applications-ebook/dp/B09Q7XQZZ6
#3	Gupta, N., & Paiva, S. (2020). *IoT and ICT for Healthcare Applications.* Springer.	https://www.amazon.com/Healthcare-Applications-Innovations-Communication-Computing/dp/3030429334
#4	Manaswi, N. K. (2020). *Generative Adversarial Networks with Industrial Use Cases: Learning How to Build GAN Applications for Retail, Healthcare, Telecom, Media, Education, and HRTech.* BPB Publications.	https://www.amazon.com/Generative-Adversarial-Networks-Industrial-Cases/dp/9389423856
#5	Dey, N., Ashour, A., Fong, S. J., & Borra, S. (2018). *U-Healthcare Monitoring Systems: Volume 1: Design and Applications.* Academic Press.	https://www.amazon.com/U-Healthcare-Monitoring-Systems-Applications-applications/dp/0128153709

Personal Business Model Canvas

Journalist

Author: Georgia Micheli, Kyriakos Lingas (MILITOS)

Journalist | Personal Service Model

Who Helps You

Editor-in Chief / Editorial Team

News agencies, Press Offices, Contacts and Resources

News Feed/ Social media experts

What You Do

Your role is to inform the audience so as to ensure democracy and the valid and timely information of active citizens.

Who You Are

Bachelor's degree
Communication skills
Research skills
Objectivity, Creativity, Credibility

Benefits You Offer

Well-functioning democracy

Social Awareness

Update and Interpretation of current affairs

Roles/Relationships

Media
Respect for the Audience
Validity, immediacy and objectivity in information

Who You Deliver
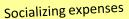
Society
Citizens
Audience

Who You Help

The public and citizens who must be informed about current affairs or about issues of social, political, historical, cultural content

Preservation of democracy, interpretation and development of cultural assets

Costs and Consequences

Socializing expenses

Stress
Criticism
Continuous inspiration

Compensation and Rewards

Salary
Freelancer
Health insurance

Social Contribution
Information
Communication
Adventure

Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Interests
Who you are

To become a journalist you should have a wealth of knowledge and interests so that you can deal with any kind of reporting, and then, if you want, find what you can specialize in. So, the first step to becoming a journalist and learning to express yourself in writing and speaking is:

- Interest in language and its correct use;
- Literature;
- Society;
- Policy;
- Art;
- Sport;
- Environment;
- New technology.

Skills, abilities
Who you are

Communication Skills

One of the vital skills you should have is that of communication. If we consider that the very definition of journalism includes informing the public and communicating current affairs, we understand how central this is. Therefore, you should not only have public communication skills [depending on the means of communication you work such as press (print or online), radio/podcast, television or online channel), but also at an interpersonal level as you should get information from sources, get interviews etc. Of course, the people who are your sources should trust you that you can communicate in the best possible way what they want to get out into the world.

Excellent oral and written skills

Following on from the previous section, it is very important to be able to express yourself orally and in writing so as to communicate news, a report, your research or your opinion. For this reason you should have a rich vocabulary and a proper command of the language in which you write or broadcast. Don't forget that journalism involves direct communication with the public which means a) that someone can learn through you and b) depending on the public you are addressing, the public itself has other requirements depending on many parameters such as educational level.

Skills, abilities
Who you are

Research Skills

Research skills are very important in the career of a journalist. You need to capture all details and use different sources to get information. In addition, you must have the ability to know how to evaluate all your data and research before presenting it to the public. So, be sure to work on your research skills and find ways to analyse and represent data.

Logical reasoning and objectivity

When reporting, reproducing news, filing a report or doing an interview you cannot afford to be biased. You should approach your issues multifaceted and objectively. Otherwise, you'll end up reporting only information that appeals to you or a certain group of people. You must be objective and argumentative before presenting any topic. Keep in mind that different kinds of people access this news. Be sure to present and write content that is respectful and unbiased. After all, you too, without blinders, can see another angle on things that can lead you to other, even more interesting reports. Of course, this does not mean that you do not have your own opinion or personality. But you must respect all opinions as we live and are based in a democratic society.

Skills, abilities
Who you are

Opinion on current affairs

Of course you should be objective as we mentioned in the previous section. But now there is a trend - more so than in the past - of commentary journalism either on live broadcasts or on podcasts/radio or in the press. The opinion on various subjects, apart from the sources and evidence, is also influenced by our character, our personal history, our experiences, our political position. For all these reasons we will be invited to comment, so we should be ready to state our point of view while always respecting all opposing positions.

Credibility

The profession of journalist carries a great responsibility as well as informing the citizen and forming opinions. So our reliability is a hallmark of our work. Not only will it bring more readership/listeners/viewers, but we will be respected socially and among colleagues.

Skills, abilities
Who you are

Journalism knowledge

In order to practice the profession of journalist as correctly as possible, you should have an educational background. Nowadays, Journalism is an original field in universities around the world and the curriculum is designed to give you both specific and general knowledge. As far as Greece is concerned, there are at least three departments in three different University institutions, while we also count numerous postgraduate programs. Usually, in the first two years, the general knowledge given concerns the following fields: Psychology, Communication, Philosophy, History, Sociology, Politics, Art, Technological Tools.

In the next two years, comes more specialized knowledge of news flow, how to write a report, how to write commentary, TV and radio production, print and online press, copywriting and more (as studying journalism opens up many career fields which we will refer to below). It is a given that professional experience develops you as a professional. Nevertheless, the educational background is necessary as it gives you the knowledge to judge current events, develops the aesthetic (an essential skill in the "image" age), makes you flexible, objective, helps you create a personal opinion and personal writing/speaking style, gives you a first impression (albeit a vague one) of how things work in the job market. Above all, educational background cultivates the way you practice we call "ethical journalism".

Skills, abilities
Who you are

Circle of contacts

In order to achieve all of the above, we should have built a circle of human contacts/sources from different fields to turn to if we want help on any matter. Politicians, economists, people of culture and art, environmentalists, athletes, businessmen; each field can be useful to us in the topics we present. Of course, building this circle requires communication and two-way trust.

Problem-solving skills and flexibility

As a journalist, you'll encounter many challenges, be it in your work, during a live show recording or in the field. It's important that you have problem-solving skills to overcome any difficulties or challenges on your way. You should be quick to identify problems and find solutions. That means you should be flexible and always to change your plans, your schedule or for example the raw of questions or the questions in general during an interview, the way you approach an issue or the things you 've planned to say on a live reportage.

Skills, abilities
Who you are

Work well under pressure & discipline

This skill applies if you work in a newsroom because it's your job to get those time-sensitive stories researched, written and checked before it must go live to the public. Plus, even if you are not working in a newsroom, you will always have deadlines on your back, especially of you are working in a daily newspaper.

Ideas and Creativity

Now, the media environment is demanding as there is so much diversity. Many times a journalist from a competing media may be working on the same subject as you. In addition, perhaps many times the current affairs are recycled and the same thematic is presented everywhere. That's why you should be creative.

To think out of the box, to look for topics that have not been presented much, for persons that will be interesting to be presented to the public. In addition, since we live in the age of images it is vital to be able to think of innovative ways to present a subject. You may be asked to suggest presentation styles to a graphic designer if you work in print, or to choose the photos for an online theme. Think creatively. Plus, many times you could change your personal style of writing to approach better a subject.

Skills, abilities
Who you are

Social Awareness

The very definition of journalism includes that the profession of a journalist is considered a function from the point of view that the journalist performs social work, works for the benefit of society as a whole and contributes to its smooth functioning. This happens not only because information leads to better functioning of the state, since citizens have the right to information. It is important to realize that the journalist has the power to influence a wide audience. For this reason, being aware of issues that will evolve society for the better is wise. Therefore, you should deal with the environment, social issues, political issues, diversity issues, portray excluded social groups, etc.

Attention to detail

Journalists are required to report news that's genuine and true. There are many sources of information, of which some are not credible.

As a journalist, you need to pay attention to detail to know if the news you're about to present to the public is accurate.

Be sure to do extensive research on a topic to give all facts available. This skill is critical. Nowadays, firstly the competition is great due to numerous media and different types of media (internet, press, TV, radio) and secondly, the speed with which news spreads is unimaginable.

You definitely should cross-reference sources, talk to your contacts and sources and on some issues, you should apply the new trend of "slow journalism": This is nothing more than the traditional, thorough research and respect for informing the public that makes them active citizens. The journalism that sometimes is buried under "viral" and "clickbaits". The journalism that brings the man and his stories to the fore.

Skills, abilities
Who you are

Combining knowledge by media type (print, online, radio/podcast, TV/online image)

The era of new media requires flexibility and knowledge of all types of media. For this reason you should have a wide field of knowledge regarding the requirements of each type of media. In the printed press you have to adapt to the limits of words and the possibilities of the paper, in the online press you have to know how to make the text more attractive according to the Google algorithms (short sentences, paragraph breaks, active voice in the sentence, etc. which we will analyze below), have basic knowledge of audio and video requirements (as well as having orthophony, correct use of language, attention-grabbing voice placement, etc.). Don't forget that nowadays, the big newsgroups use all types of media and you may have to find your way from one type to another.

Digital Literacy

Currently, digital literacy is a must-have skill for most careers. As a journalist, you must know how to use things like websites, apps, social media, laptops and tablets, since they are the new broadcast mediums. To have a rewarding career, you must be willing to adapt and accept change, such as the use of digital platforms. This is because using digital media to broadcast news is one of the best ways to reach a large group of people. The details about the basic knowledge you should have it is developed below. But remember this: be sceptical about new media, but use them to your profit. If we use new media wisely, our work gets easier.

Character Traits
Who you are

Stress Resistance

In this job, it's impossible not to be stressed about deadlines as well as the quality, quantity and impact of your work. Find constructive ways to get rid of it and not get disorganized. A first principle is to organize your time and work.

Be organized

Put a program and a plan according to the priorities set by the editor-in-chief or the news itself. You can work on many topics at the same time, but it must be prioritized. It is the only way to not have discounts on the quality of the report result.

Persistence

As a journalist, it's not always that your sources will be willing to talk or give you the information you need. It's crucial that you remain determined and keep persisting in the story.

See topics from many aspects

Every coin has two sides and by definition you have to present a subject from different angles. Don't be biased, don't wear blinders. It's the only way to analyze a topic in depth.

Intuition and perception

It is important to have a good instinct to find topics that concern a wide audience and the perception to grasp the trends of the time. It is a good start to choose and suggest topics.

Patience

You may need to work a lot of time to deliver a subject the way you want it in quality. Also, new facts and opinions may emerge. Don't rush to finish to relieve stress and obligation.

Character Traits
Who you are

Team and individual work

Most of times, you work alone in the sense that one is the person who will undertake to cover an issue. But this is not a rule. You may need to work together with another colleague. Beyond that, you should learn to work with all the key partners depending on the type of media where you work. If you're in print or online, you'll need to work with your graphic designers, news feed, or social media manager to know when your story will be published. If you're on radio or TV, with key audio and video technicians (cameramen, boomers, etc. – below, you will find more details).

Accept Criticism

Since your work is exposed to the public every day, you should be ready to accept criticism. Especially with our daily contact with social media, you could be harshly criticized. Of course, until we get to that (the publication), your texts will definitely go through the editor-in-chief for approval. This process has many possible outcomes: he/she could make a few changes to the text,
or he/she could assign you to rewrite it from scratch or rejects it altogether.

Respect and Empathy

Respect and empathy are essential elements as you can deal with sensitive issues and get into very personal aspects of a story. Most of the time, the profession is about human stories and personal communication. You should put yourself in the other person's shoes and not embarrass them.

Learn continuously

News and trends are constantly changing. You should be ready to revise theories or opinions, be open to learning about topics you don't know about, ask questions and be curious. In addition, don't forget that new media are constantly being developed and you should stay up to date in order to do your job better and faster.

Don't be afraid to be yourself!

Every person has their own distinct style. That's why you shouldn't be afraid to expose the sides of your personality through the content you develop in general. The public will choose you as much for your reliability and objectivity as for your personality.

Tools, Environments
Who you are

Welcome to a multimedia environment

Not many years ago, the journalist's tools were nothing more than the following: pen/pencil, pad, typewriter/computer, telephone and fax. But the whole information environment has changed. Once, it seemed chaotic. But today's journalists are trained in all environments, depending on the type of media in which they work. What exists as a common feature, however, is the Internet and its use by both journalists and the public. So, if we want to do our job properly, we should accept the fact that we are "multimedia journalists" and not only copywriters or reporters.

Before all this, let's clarify that the general knowledge that all professionals should have now is necessary: knowledge of using a PC, emailing, writing texts in Word Office, while if you want to analyze data or draw a conclusion with numbers the use of Excel Office is important.

In general, flexibility in Office Tools helps your work as it offers possibilities that help in better organization, communication, visual presentation, etc. An important element is the knowledge of recording that all mobile phones now have for recording statements or our own thoughts. Last but not least, the use of social media is a crucial point for the career of journalist, so their utility will be analyzed separately.

Below we will analyze all the regional knowledge/tools that a journalist should possess both to do his work faster and better, as well as to become well known and be asked for his opinion.

Tools, Environments
Who you are

A) The press
Basic knowledge of graphic design, typography and page architecture

Usually, as a journalist, you are not responsible for the final inspection before the newspaper or magazine reaches the printing press. But it is good to have some basic knowledge as at some point you may reach the position of editor-in-chief. Usually these are learned on the job and not during studies. The things you need to know in order to work better with graphic designers are:

- Basic InDesigner knowledge for any textual changes.
- Basic knowledge of the space a page or two offers so you know your word limit and limit your inspiration.

- To know the basic rules about page architecture: ideal spacing between lines and letters to make reading more relaxing and enjoyable.
- To know the properties of the papers where the magazine or newspaper is printed so that you know the thickness of the page, how the colors will be printed etc.; thus, your ideas and creativity are highlighted through these properties.

Tools, Environments
Who you are

B) Video (TV, YouTube Channels)

Having basic knowledge about shooting a video helps both if you are a journalist in a media channel to have good cooperation with the technicians, and yourself, in case you want to do your own work, even through YouTube. The basics you need to know are:

- Microphone function: if you know the technical characteristics, you can place your voice accordingly.
- Shots: If you know how to position yourself in the shot, you facilitate the one shooting. So you can familiarize yourself with the frame and lighting even from your mobile phone.
- Skype and Zoom: Covering a topic you may connect live and need to appear via Skype. So you can familiarize yourself with its operation, the connection, etc. and get to know other applications such as Zoom.

C) Broadcasting (Radio/Podcast)

In the same logic as above, it would be good to familiarize yourself with the technical characteristics of an audio console in order to facilitate the technician. In addition, you can experiment with recording programs, as you may need to deliver a podcast with the fewest problems (good file resolution, file formats like mp3 or wav, clear audio, etc.).

Tools, Environments
Who you are

D) Online Press or Digital Journalism

Essentially, journalism is now digital, since as we have seen, technical tools are needed so that the information of the public can be obtained immediately and qualitatively. All information now passes through the Internet. But especially if you work in an online media, the following are basic tools that you will use, since most of the time you will not just write a text, but you will also be asked to upload it to the website.

- Editing photos/videos: Most of the times, you are the one who choose the photos that will that will frame your article. So, you should know how to take good photos and videos and then edit them to make them stand out better.

- Basic Photoshop Knowledge: Although it's more of a graphic design job, knowing some basic photoshop functions helps you create images that grab attention so that someone will read an article just because of the combination of a title and a photo. Caution: photoshop should not be used as tool of disinformation. Only as a creative tool to create better images.

the help of the technician. One of the basic builders is Wordpress which has prevailed in the Internet space. Wordpress also gives you the knowledge to create quality content according to Google's algorithm (ideal word count, sentence size, syntax, number of photos).

- Google Tools: A basic tool to study our audience, its trends, its interests and its characteristics are Google Analytics. So with these elements we can be more creative, come up with ideas and achieve the greatest possible readability. Also, familiarity with the use of Google helps in our research. Google also has a wealth of tools that make our work easier, such as voice typing for example that saves time from transcriptions. It is very important to keep in mind that we should use these tools to our advantage and not become "slaves" to the machine, degrading the quality of our work to achieve readability.

Tools, Environments

Who you are

Social Media Knowledge

Social networks today are considered to be a dominant part of the daily life of modern people. What started as a social interaction has today come to dominate even the field of information and journalism. A large part of the public gets informed about the current affairs through Social Media by following news website pages. This means that you should be familiar with the keys of each Social Media. With Facebook, Instagram and Twitter as the main players in the news, you should know their special features in order to create quality content and give instructions to the Social Media Manager about how to publish the content. But there are commonalities in the way the public is informed through social media. So, regardless of which platform we're talking about, the basics you should know are that ournalism via Socia Media needs: enticing photos, brief gist of the article, and to-the-point headlines.

- Everything above applies here too: you should use the best elements of each medium and you are not led to misinformation with the sole purpose of readability, clicks and views.
- In addition, you should know that social media is the means for you to become known to the general public, for them to consider your opinion, to enjoy your writing, videos or podcasts. Therefore, using them, also helps to promote your own work, which is information and communication.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

"Daily" routine

E-mail and Press Releases

Information about what is happening in the world, about possible topics that you can work on or about current affairs is also done through Press Releases which you receive from the Press Offices (every Public Body, business or person of the current affairs cooperates with Press Offices and Public Relations Professionals). You should have made sure that you are on their contact list so that you get the information and decide whether to deal with an issue, event or person.

Contact with news agencies

A news agency or news agency or press agency is an organization of journalists with the purpose of providing news to news organizations: newspapers, magazines and broadcasters. You should make sure you are on their email list so that you can learn the latest news from your country and the world. Getting informed through news agencies is important as their information is usually valid and cross-checked.

Press Conferences

Public bodies and large companies organize press conferences to inform journalists. During these conferences, they present some of their programs or products and give informative material to journalists so that they are interested in developing the issue or talking to key persons. Such events do not happen on a daily basis, but it is important to attend as you open your circle of contacts. Plus, most of the times you are obliged to attend because your represent the media where you work.

Meetings with Editor-in-Chief and Editorial Team

Meetings with the editor-in-chief and the rest of the media's journalists are a daily occurrence as topics are assigned and news management is shared. Even if you work at a media that doesn't deal with current affairs, meetings are necessary to discuss ideas.

Key actions
What you do

News Feed-Newsroom-Current Affairs

There should be daily communication with the news feed manager, especially if you have a job in the news feed. This means that you will be informed of the priority that should be given to each issue and which one you should deal with. Usually the priority depends on the proximity and importance of the news. In any case, you will have to prioritize the news you receive and work on a level so that the affairs you present are differentiated from other media.

Research and Writing

What will definitely be included in your daily routine will be research and writing (even in the form of notes rather than articles). Even if you don't have to deal with a current issue, you should definitely work on a report or interview you have undertaken. Therefore, researching and planning your subjects is high on your daily agenda.

Be aware of reports and current affairs of other countries

Not only do you come up with ideas, but by knowing what's going on in other countries, you can interpret events in the place where you work. And this is what you have to do: to inform the public and to interpret the events according to your own point of view in order to give windows of interpretation to the citizens. In a globalized society, everything can be interpreted with corresponding models and examples.

Key actions
What you do

Personal Development key actions
Development of personal interests

Depending on your character and interests, you can specialize in a subject. This does not mean that you will not deal with other things, but you can focus on a field of interest. Sports, culture, literary criticism, music, theatre, finance, politics, social, police reporting can become your speciality and thus turn your passion into a profession. In the long run, this specialization can provide you with more job opportunities and more credibility.

Learning, Reading, Up-to-date with Current Affairs

To become a better journalist, you should constantly expand your knowledge and read literally everything that comes your way. This means that depending on your interests and expertise, you should not stop being informed about events, new studies, new trends on different topics.

Be aware of the work of colleagues from competing media

It's good to follow the work of colleagues that you or the public admire.

Not to copy or "steal" topics, but to unlock the secret of success, to get ideas, to develop yourself in your work.

Transcripts

An important part of the journalist's work that we have not yet developed is transcripts. This means two things: transcribing an interview and putting it on paper, or transcribing statements to fit into an article/text/report, or transferring statements to oral speech for public information. This is a time consuming process that you need to be trained in. Essentially we are talking about transcribing someone else's words. But these words must be transferred to the written word, so you should be trained to keep the essence and externalize the message that the person speaking wants to pass. The same applies if you convey someone's words orally; you have to convey meaning and information. To do this, you could ask more experienced journalists to help you. It is one of the most important keys to the job and requires friction and experience. And the better you are at this, the more your sources, contacts and, finally, the audience trust you.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

This specific profession does not include the customer relationship and should not by definition. As part of the code of ethics states, the role of the journalist is:

- To reaffirm and ensure the social role of the journalist in the new conditions, shaped by gigantism, the oligopoly in the ownership regime, the increased reach and influence of media and the globalization of communication.
- To discourage and resist any attempt at governmental or other influence by self-determining rules of responsible professional functioning.
- To secure the freedom of information and expression, the autonomy and dignity of the journalist and to protect the free press for the good of democracy and society.

Therefore, in order to ensure democracy, freedom of speech and the information of active citizens who have the right to information in order to properly exercise their role as citizens, journalists should have a sense of responsibility towards the public and the concept of advertising in their work.

"Advertising" creeping into journalism

Buying a newspaper or a magazine for example, is always paid for. This of course creates a responsibility as the public chooses which medium and which journalist to read. Your customer is the audience that chooses you.

Of course, no medium gets its money from public purchases anymore. The free internet and TV (paid platforms are not yet widespread in Greece) has turned people away from paid information. So advertising is a one-way street. Advertising has become part of the media and many times journalists are "forced" by the employer of the media where they work, to pass an advertising message through their work. How can validity be combined with advertising, especially when the employment relationship is a salaried one? What if advertising in the broadest sense is about politics?

Customers
Who you help

Politics and party propaganda

Political reporting is a very sensitive subject as it is one of the basics of journalism. Of course, every journalist has his political position and party preference. But losing his objectivity or propagandizing in favor of one or another political party goes against journalistic ethics.

The case of television

Television is the medium that has the most distinct boundaries between news and advertising. Now, to avoid disorienting the audience, channels are required by global directive to display the message "advertisement" or "advertisement content" or "advertisement break" or "political ad follows" in respective cases. These messages draw a line and clearly separate information from marketing. Of course, there is no lack of indirect advertising, such as through contests for the public to win a product or service. However, it is at his discretion whether he participates in the contest or not.

The case of the internet

On the internet, there are now both banner and pop-up ads. This process is also direct advertising, since there is an option to stop showing ads. Websites are paid to place the respective ads. And journalists can indirectly pass through their texts a promotion of a store, product or service. If it's their personal opinion (when they like something, they have every right to share that opinion), that's fine. But what if there is a price to pay?

Customers
Who you help

The case of free press magazines/newspapers and the financial survival of websites that have no income from elsewhere

The latest trend is the release of free press magazines (without payment) and websites that do not have a pool of money from elsewhere (as if they are a "continuation" of a newspaper or magazine). The revenue of these media comes exclusively from advertisements. How can a journalist ensure his objectivity, even if he is asked to write advertising text? That depends on a lot. First, he can, even if there is a crew, present everything in a positive way, but he can choose where to focus. Second, he can ensure this by not signing the text. Third, he could pass over the negative elements he detected even quite superficially.

New internet trend: paid update

With a simple visit to major websites, you now understand that you cannot have free access to all articles/videos/podcasts, regardless of the type of content. You will have to pay a small fee to read it all. The message that comes out before the payment usually emphasizes the need to make journalism independent of politics or advertising. And from the looks of it, the public appreciates this step.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

Democracy, Society, Human as a personality

The official definition of journalism points out that journalism is the collection, preparation, and distribution of news and related commentary and feature materials through such print and electronic media as newspapers, magazines, books, blogs, webcasts, podcasts, social networking and social media sites, and e-mail as well as through radio, motion pictures, and television. The word journalism was originally applied to the reportage of current events in printed form, specifically newspapers, but with the advent of radio, television, and the Internet in the 20th century the use of the term broadened to include all printed and electronic communication dealing with current affairs.

On the other hand, democracy in the current sense that requires a decision by citizens and voters about who to vote for involves an inalienable right of theirs: that of information. Information is a key element for democracy to function, the very polity that now prevails in the world, even with some variations.

The right of man and citizen to inform and be informed freely is inalienable. Information is a social good, as only with information you decide where you would like to move as a citizen, who to vote for, what decisions to make for the future, what good you can offer to society. Thus, information on all kinds of social, historical, political, cultural, environmental issues is the first step in forming an opinion and subsequently taking action.

The essence of the journalist's profession lies precisely in this. In the update. But why are journalists useful at a time when everyone now has easy access to information, while on the other hand, due to the new Media, citizen journalism can also be practiced?

Value proposition
Benefits you offer

The role of the journalist in the era of globalized media and new media is what it has always been.

But we must emphasize that information does not simply mean transmitting information about people and events. Through word and image choice, perspective and evaluation, journalists have the power to give their audience the status of a body of citizens in the moment they inform. Their role is now, as it always has been, that of trainers as well as reporters. In this sense, journalists are speaking to the public that they themselves are responsible for creating through their choices.

In the age of global media, visual information in particular has proliferated to unprecedented levels. The journalist's role is to organize this wealth of information. To provide interpretations that place events in a larger context and relate them to each other so that the audience can form a complete picture of the universe and their place in it.

Therefore, even in the era of unrestrained information, the journalist helps the orderly functioning of the state, the society, the highlighting of the characteristics of all social groups and finally, helps the person himself to develop, to evolve, to act, to decide.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
   5. How will you follow-up to make sure Customers are happy?

Channels
How you deliver

The profession of a journalist necessarily includes publicity and recognition. But because each medium has a different power, it doesn't mean that in order to promote your work, you don't need anything other than doing it!

You too can promote and display what interests you in two very basic ways.

Personal Social media

Now, social media has entered our daily lives. And everyone can promote their work through these networks. One more slogan for a journalist whose job is to inform anyway. Therefore, you can shape your professional image on social networks. and to republish the projects you have undertaken and you like.

Emailing

You can create an emailing list in order to send your own personal newsletter once a month or a week where you will collect your articles, videos or audio files to present your work completely and inform your contacts.

Personal Website
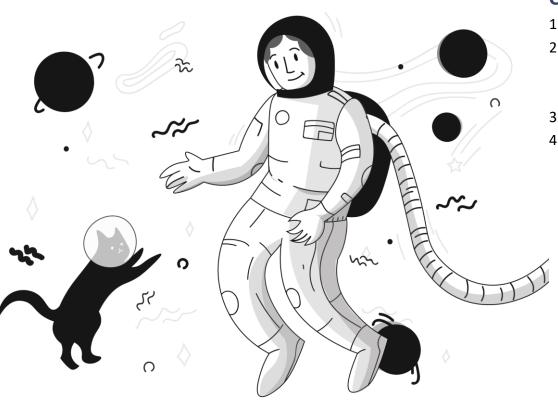
Nowadays is easy to create a personal website where you can upload your work. Don't forget to mention every time the media on which your text, video or podcast was hosted.

Linktr.ee

Linktr.ee gives you the opportunity to create and customize your bio link in minutes. By connecting your socials, website, store, videos, music, podcast, events and more, your work comes together in a link in bio landing page designed to convert. This can help the audience find everything gathered, so as potential working environments. Think of that as a portfolio that could replace a personal website.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

With experience and study, the sense of responsibility that is central to this presentation becomes a compass for our work. Validity, immediacy, personality and professionalism are all needed to build our audience, both personal and of the medium we work on. For this, in addition to all the above, you also need to detect the characteristics of the audience that follows the media where you work, but also the characteristics of the audience that you would like to follow you.

By actually discovering your own desires, you can build an audience that won't necessarily agree with you on everything, but will respect your perspective, your work, your opinion, and maybe even be inspired by you to do his life better or acquire new interests.

Examples of such journalists at the global level are numerous, with Oprah Winfrey being the most popular one.

If you observe the Oprah phenomenon objectively and as a social experiment, Oprah was the one who showed the general public her personality and style while bringing social content issues to the public. The content of the broadcasts may not always be of good quality. That goes without saying. However, Oprah herself is distinguished for her honesty, empathy, validity and concern for the public.

To build a decent relationship of respect with your audience or the medium where you work you need:
- sincerity
- validity
- personal style
- empathy
- courtesy
- while, using all communication channels and even responding to public comments, this gives an interactivity that ensures a long-term communication and mutual appreciation with a wide audience, even if you don't know them personally.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

Editor In Chief

The editor-in-chief is the one who has ultimate responsibility for what is published in any type of media. Initially, his help is valuable as he can give you directions and illuminate angles you hadn't considered. Secondly, he has in his mind the whole range of the material presented and how the subjects are combined with each other, the order they should have and so on. Third, he is the one who has the experience to fix or fundamentally change your deliverable for the better. He is one of the key partners, who is of course the leader, but he can also be a fellow traveler who helps you every day and develops you with his observations over time.

Editorial team

Colleagues who belong to the editorial team are crucial partners as they can help you with their opinions to carry out a topic, even if you think it is easy. Polyphony promotes your work as it is one of its key features by definition.

In addition, teamwork among the editorial team leads to a better overall result since everyone investigates the reportage/issue they have undertaken, but at the same time there is a common aesthetic and goal.

News agencies, Press Offices, Contacts and Resources

In order to have the information and to come up with ideas for topics or to be the first to be informed about current affairs, you should be in daily communication with news agencies, press offices, your contacts and sources. As you may have already understood, journalism and communication are often synonymous. Therefore, socializing helps you to always be informed, since good relationships with those who share communication or have an opinion and knowledge on a subject ensure a good cooperation so that you always have a "pool" of opinions, news and information.

Key Partners
Who helps you

News Feed
The news feed team is the one that has the direction for prioritizing the topics presented. Direct communication with them helps you prioritize your work and organize yourself in relation to everything you have to deliver during the day. As we mentioned, you can also be part of the editorial and news feed. This means that you are in consultation with the whole team to better inform the public.

Social Media Manager
As with the news feed, the order in which news and topics are presented across social media channels is equally important. You should consult the Social Media Managers as they also have the know-how to guide you on when it would be best to bring up a topic on social media or how. In addition, he may need your help for the brief presentation of the post and it would be good to have a consensus on this, as you are the one who know best your work,

what is the central meaning and what parameters you analyze on your report. Therefore, there should be mutual support and cooperation.

Technicians
In any media, technical experts are essential to help you get the most out of your work. Therefore, the website technician, the cameraman, the sound engineer and those who have special knowledge about the means used to spread the news are people who can give you advice. In addition, you must be very careful and learn at least the basics to facilitate their work as they have a lot of responsibility, as well as to gain experience in many aspects of the profession and to propose solutions to any problems that arise or new ideas.

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Salary or Freelancer

Journalism can offer you either a monthly salaried job status or you can work as a freelancer. More specifically, in Greece:

a) in printed and/or online media your salary can be from 750-1500 euros per month (includes health insurance), while if you work as a freelancer you can get from 50 to 500 euros per text/audio/video, depending on the medium and the your own recognition (includes personal health insurance).

b) to radio shows, the same applies as above.

c) in television, which has even more influence on the public, but also due to schedules, the need to be prepared and the technical knowledge you must have, your earnings can reach quite high levels (up to 10,000 euros per month), while if presenter of news, shows, etc. you make a different deal that depends on the financial possibilities of the group and your own recognition.

Personal Benefits
Social Contribution

With the power given to you by the audience that follows you, but also by the media in which you work, you can communicate and study a large number of subjects that, if we were to give it a name, it would be "social reporting". Many topics, interviews and surveys aimed at social awareness can become the center of your engagement. Besides, giving publicity to people in need, then you can make someone's life better. You are the connecting link that informs the public, so you also help from your position in social solidarity.

Information and knowledge

Not only are you the first to learn the news, but with your research you can have knowledge in many fields. Thus, you acquire more interests and can form an opinion on a multitude of subjects. In addition, you have access to information that you would probably never come across. More occupation for your mind? Maybe. But aren't you curious to know?

Revenue
What you get

Meeting new people and places

On the occasion of this job, you can travel to many parts of the world, which under other circumstances you would not be able to visit. Expenses are definitely covered because you are usually assigned a report. If you have your own website, through advertising or with the help of sponsors you can make trips. Thus, you get to know other cultures and of course people, so you could make friends all over the world. Even if you don't go abroad, what's better than reaching every corner of your country?

Communication with people

Journalism is communication. Discovering real human stories and meeting people willing to talk to you about their lives has many benefits as you can learn from them. In any case, communicating with people helps you get out of your own microcosm and deal with any dramatic or joyful event with empathy.

Expression and creativity

By writing about any subject but especially about a subject you like, you can express yourself through the written word. This gives your daily life a creativity that is not easy to find in other jobs, in routine and everyday life, since you put your own artistic touch on every text/radio show/podcast/video etc.

Home, office or outdoors

Most of the time, you will indeed need to be on the road for a long time. However, depending on what subject you are dealing with, you can also work from home, if your physical presence in the office is not required for some other reason.

Run your own business

If you want to practice journalism in your own way, it is easy to start your own "business", where you will express yourself freely, without restrictions. With the least possible cost you can build your own site, with texts, podcasts or videos. And if you have a lot of business, you will definitely attract a lot of customers for advertising.

Revenue
What you get

Other Fields Of Career

Journalism studies, as well as experience in the profession, can open windows for you to change careers and not practice purely as a journalist.

There are fields related to communication that you can discover:

Advertising and Social Media Management

Advertising needs people who know well the power of speech and words, how to convey an information, how to make a product or service more attractive to customers. Studying journalism makes you more popular in careers that involve content creation such as social media, a field, of course, that needs additional studies and seminars.

PR and Communication

Your contribution to Press Offices would be valuable since you know what communication means. Also, having acquired a circle of contacts (journalists or not) you can promote better and with less expenses the product or service of the one you have taken on as a communicator.

Correction and Editing

Knowing the language well and taking specialized seminars, you can work as a proofreader and editor in both media groups and publishing houses. Every writer seeks the help of an editor and proofreader.

Costs

Costs Include:
1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Potential Expenses

Great effort to get the rewards you deserve

In the beginning of your career, you will have to work more and get paid less, until you build your audience, gain experience and become a valuable asset. In the past, in times of greater crisis, young journalists may have practised for little money. This has thankfully changed and the fees are more proportionately correct.

Movement expenses

As a rule, movement, food and travel expenses are covered. But, you may have to make some expenses in order to socialize and get closer to your contacts. So, it is possible to make an appointment outside of business hours and shoulder the costs.

Consequences

Continuous inspiration

When we create original content, new ideas and inspiration are needed. Even if we are reporting live on TV, where the main purpose is to inform, we must have properly prepared what we are going to say.

No tight schedule

Many times there are no working hours and an urgent matter may arise outside of working hours. Sure there are shifts to cover the news, but you never know when you'll need to see a contact or get information from a source for a story.

Stress

Excessive workload and possibility of being away from home all day. Certainly, this causes stress and fatigue. Stress is also caused by the fact that your work is under criticism, both by the public and by the employer.

Costs
What you give

Criticism

As we mentioned above, being constantly "on test" can cause frustration. You should be able to withstand criticism and focus on doing your job right. Perhaps, sometimes you need to not even listen to the bad criticism, but only the constructive one, the one that develops you as a professional.

Physical and mental integrity

As a journalist, you will get very close to tragic human stories, natural disasters, wars, crimes, violent events. This can be dangerous physically, but it definitely takes a toll on you psychologically.

Golden Reads

	5 GOLDEN READS FOR JOURNALIST	LINK AMAZON
#1	Kovack, B., Rosenstiel, T. (2014). *The Elements of Journalism: What Newspeople Should Know and the Public Should Expect.* Crown Pub.	https://www.amazon.com/Elements-Journalism-Newspeople-Completely-Updated/dp/0307346706
#2	Hane, P. J. (2000). *Super Searchers in the News: The Online Secrets of Journalists & News Researchers*. CyberAge Books.	https://www.amazon.com/Elements-Journalism-Revised-Updated-3rd/dp/0804136785
#3	Harrower, T. (2012). *Inside Reporting: A Practical Guide to the Craft of Journalism.* McGraw-Hill.	https://www.amazon.com/Inside-Reporting-Tim-Harrower/dp/0073526177
#4	Cappon, R. J. (1999). *Associated Press Guide to News Writing: The Resource for Professional Journalists*. Arco.	https://www.amazon.com/Associated-Press-Guide-News-Writing/dp/0768919797
#5	Foreman, G., Biddle, D. R., Lounsberry, E., Richard, G. J. (2022). *The Ethical Journalist: Making Responsible Decisions in the Digital Age*. Wiley-Blackwell.	https://www.amazon.it/Ethical-Journalist-Responsible-Decisions-Digital/dp/1119031737

Personal Business Model Canvas

Intelligent Management Platforms

Author: Artur Romão, Maria José Varadinov (IPP)

Intelligent management platforms (Remote management) | Personal Service Model

Who Helps You

Top management (CEO)

Technical Support IT Management Staff (CIO, CTO)

Technology Vendors, Certification and educational programs

Subject Matter Experts

What You Do

Implementation, maintenance and modernization platforms

Incident monitoring and response

Who You Are

Soft Skills
Analytical and systems thinking skills
Problems Solving
Fast learning
Proper technical certification

Benefits You Offer

Increasing the competitiveness of the organisation

High level of innovation

Optimization of technical
Maximization of business assets
resources

Maximization of business assets

Roles/Relationships

Team Member
Consultant
IT Support Team

Who You Deliver

Operation Reports
Online Meetings
Remote configurations

Who You Help

Customers of the organization, Stakeholders
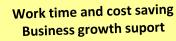
Superiors
Team Leaders
Team Members

Employees of the organization

Costs and Consequences

Training on diferent IPM solutions;
Gradutions
Software license costs

Stress
Time pressure

Compensation and Rewards

Work time and cost saving
Business growth suport

Best service response
Employee Market

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TOP Management

The CEO, or Chief Executive Officer, is the highest-ranking executive in a company and is responsible for making major corporate decisions, setting the strategy of the organization, and ensuring that it is implemented. The CEO is also responsible for ensuring the financial performance of the company, overseeing all operations, and building and managing the company's overall public image.

In addition to setting the company's overall direction, the CEO is often the public face of the company and is responsible for communicating the company's message to stakeholders, including shareholders, employees, customers, and the media.

The CEO reports to the board of directors and is ultimately responsible for the success or failure of the company. As such, the selection of the CEO is a critical decision for the board of directors and can have a significant impact on the future of the organization.

Technical Support

Technical support refers to the services and resources provided by a company to help its customers or users troubleshoot and resolve technical issues related to the company's products or services. Technical support can be provided in various forms, including phone support, email support, live chat, and in-person support.

IT management, on the other hand, refers to the overseeing and direction of the information technology (IT) used within an organization. The Chief Information Officer (CIO) and Chief Technology Officer (CTO) are two of the key IT management roles in a company.

The CIO is responsible for the overall technology strategy and implementation within the organization, including the development and management of the company's information systems, technology infrastructure, and data management. The CIO works closely with other business leaders to align technology goals with the overall business strategy and ensure the efficient use of technology to support business processes.

The CTO, on the other hand, focuses on the development and implementation of the company's technology vision and plans for future technology needs. The CTO is responsible for researching and recommending new technologies that can benefit the organization, and for overseeing the design, development, and testing of new technology products or systems.

Both the CIO and CTO play a critical role in ensuring the effective use of technology to support the organization's goals and objectives, and in making sure the company remains competitive in the marketplace.

Technology Vendors

Technology vendors are companies that provide technology products, solutions, and services to other businesses and organizations. These vendors offer a wide range of products and services, including hardware, software, cloud services, consulting, and support.

Technology vendors play a critical role in the technology ecosystem, providing businesses and organizations with the tools and resources they need to effectively manage their operations and achieve their goals. Some of the key areas in which technology vendors operate include:

1. **Information Technology (IT):** IT vendors provide products and services related to computer hardware, software, networking, and storage.

2. **Cloud Computing:** Cloud vendors provide cloud-based solutions and services, such as infrastructure as a service (IaaS), platform as a service (PaaS), and software as a service (SaaS).

3. **Cybersecurity**: Cybersecurity vendors provide products and services to protect organizations against cyber threats, including firewalls, intrusion detection and prevention systems, and encryption technologies.

4. **Artificial Intelligence (AI) and Machine Learning (ML):** AI and ML vendors provide products and services that leverage these technologies to improve business processes and decision-making.

5. **Internet of Things (IoT):** IoT vendors provide products and services that enable the connected devices and systems that make up the Internet of Things.

Subject Matter Experts

An intelligent management platform expert is a professional who specializes in the implementation, customization, and use of intelligent management platforms. They have a deep understanding of the technology and its capabilities, and are skilled in leveraging these platforms to help businesses and organizations achieve their goals.

Some of the key responsibilities of an intelligent management platform expert include:

1. Implementation: Working with organizations to design and implement intelligent management platforms that meet their specific needs and requirements.
2. Customization: Customizing the platform to meet the unique needs of different organizations, including integrating the platform with existing systems and processes.
3. Data Management: Ensuring that the platform is effectively collecting, storing, and analyzing data, and using this data to provide valuable insights and recommendations.
4. Training and Support: Providing training and support to users of the platform, helping them to effectively use the technology to achieve their goals.
5. Continuous Improvement: Staying current with developments and advancements in the field, and working with organizations to continuously improve their use of the platform.

Intelligent management platform experts play a critical role in helping organizations to effectively use these platforms to drive business growth and success. They bring a deep understanding of the technology and its capabilities, and work closely with organizations to ensure that the platform is effectively meeting their needs and driving positive outcomes.

Eg.: Threat Intelligence Platform manager

A **Threat Intelligence Platform (TIP)** manager is responsible for overseeing the operations of a platform that is used to collect, analyze, and disseminate information about potential cyber threats to an organization. The TIP manager is responsible for ensuring that the platform is functioning optimally and that the information being provided is accurate and relevant. This can involve working with a team of security analysts and researchers to gather data from various sources, as well as monitoring the platform to ensure that it is able to detect and respond to new threats in a timely manner.

Some of the key responsibilities of a TIP manager include:

1. Overseeing the implementation and operation of the TIP platform;
2. Working with security teams to develop and implement threat intelligence strategies;
3. Monitoring the platform to ensure that it is functioning optimally and that the information being provided is accurate and relevant;
4. Collaborating with other departments, such as IT and marketing, to ensure that the information being provided by the TIP is being used effectively;
5. Providing training and support to users of the TIP platform;
6. Developing and maintaining relationships with external organizations and security vendors to gather and share threat intelligence information;
7. Evaluating new technologies and techniques for improving the effectiveness of the TIP platform.

Overall, a TIP manager plays a critical role in helping organizations to stay ahead of emerging cyber threats and to respond quickly and effectively to any incidents that may arise.

Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Interests
Who you are

The intelligent management platforms are technological solutions, usually based on open platforms with modular, flexible and scalable architecture, which provide the possibility of monitoring, analysis and management of the entire corporate ecosystem, capable of providing useful information to the operational and strategic management of the organization and the different stakeholders.

In the remote management of these platforms, powerful information management and analysis tools are used, allowing the integration of different data sources, external or internal to the organization.

Thus, to be able to work with these platforms in a remote work environment, you must have an interest in the following areas:

- Technology;
- Remote work;
- Intelligent management tools;
- Internet of Things (IoT);
- Security;
- Privacy;
- Big data;
- Machine learning;
- Networking;

Abilities and skills

Who you are

Abilities and Soft Skills

Understanding the importance of these types of platforms, for remote management of these platforms the following skills should be considered:

- Logical, analytical and critical thinking;
- Resilience, stress tolerance and flexibility;
- Capacity for rapid learning;
- Ability to work in a remote environment;
- Fluent in English;
- Ability to collaborate and work well within a team;
- Excellent diagnostic and problem solving skills;
- Excellent communication ability;
- Active learning and learning strategies;
- Good organizational and time-management skills;
- Creativity, originality and initiative

Abilities and skills

Who you are

Hard Skills
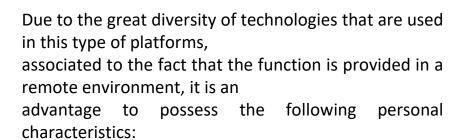
Considering the technical knowledge required to perform the function, it will be an asset that the basic academic background is appropriate and relevant experience in the area of IT and IS, specifically in the following areas:

Bachelor's degree in:
- Computer science;
- Management System Information;
- Software programming;
- Information technology;
- Engineering;
- Advanced knowledge of data management and SQL for data manipulation;
- Or in a related field.

Personality
Who you are

Due to the great diversity of technologies that are used in this type of platforms,
associated to the fact that the function is provided in a remote environment, it is an
advantage to possess the following personal characteristics:

- Very organised;
- Extremely focused on objectives;
- Good communicator;
- Very resilient to the challenges that he will be subject to;
- Likes to work as part of a team.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Personal Key Activities

Intelligent management platforms can be used to support the canvas business model by automating and streamlining key activities related to customer segments, value propositions, channels, customer relationships, revenue streams, and key resources.

1. Customer Segments: The platform can help identify and segment customers based on demographic, geographic, psychographic, and behavioral criteria, allowing for targeted marketing and sales efforts.

2. Value Propositions: The platform can help identify and prioritize the value propositions that are most important to customers, improving the alignment of products and services with customer needs.

3. Channels: The platform can help optimize the channels through which customers interact with the company, improving the customer experience and increasing customer engagement.

4. Customer Relationships: The platform can help manage customer relationships, including customer service, support, and feedback, improving customer satisfaction and loyalty.

5. Revenue Streams: The platform can help optimize revenue streams by automating billing and invoicing processes, improving accuracy and reducing administrative costs.

6. Key Resources: The platform can help manage key resources, including human resources, technology, and financial resources, improving the efficiency and effectiveness of resource utilization.

By automating these key activities, intelligent management platforms can help organizations effectively implement and execute their canvas business model, leading to improved business performance and growth.

Key actions
What you do

Personal Key Activities

This type of platforms are very important management support tools in the decision-making process, so the professionals responsible for their management, whether remote or on-site, have the responsibility of keeping the platform updated and available. Therefore, some of the functions for this position are the following

- Help the Customer in choosing the solutions to implement;
- Implementation of the solution selected by customer;

- Management tasks related to its maintenance and updating to new versions;
- Communication with the client;
- Preparation of reports on the operation of the platform;
- Monitoring and optimising the operation of the platform;
- Incident detection and response;
- Collaborating with the IT team in the preparation of a disaster recovery plan for the platform;
- To design a plan for the evolution of the platform.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers

Who you help

This type of intelligent platforms are innovative solutions, equipped with some artificial intelligence capacity, which allow autonomizing the operation of certain processes, based on a set of previously defined rules.

The adoption of this type of platforms does not find limits regarding the type of organisations, and can be adopted by different types of organisations:

- Financial institutions;
- Technology companies
- Public institutions;
- Industry;
- Manufacturing companies;
- Sales and retail business;
- Service Providers;
- IT companies.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

These professionals can perform various functions to help their different stakeholders, but the greatest value proposition that this position offers to the organization is related to the assistance that this type of platform can give to different areas of the organization.

Team Leaders

Helps in monitoring the performance of the organisation.

Value Proposition

IT team

It helps IT teams in managing the operation of the platform.

Superiors

It provides useful information for defining a strategy.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
    1. How will potential Customers discover how you can help them?
    2. How will they decide whether to buy your service?
    3. How will they buy it?
    4. How will you deliver what Customers buy?
    5. How will you follow-up to make sure Customers are happy?

Channels

How you deliver
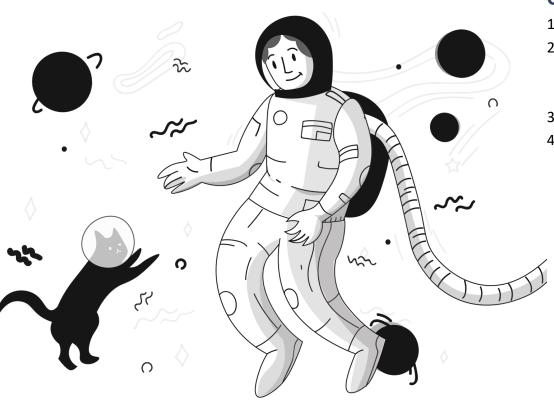
The remote management of this type of platform is closely associated with the type and supplier of the platform itself. Thus, this specific position is often hired by organisations after or during the process of acquisition and implementation of the platform in the organisation.

Professionals in this area have at their disposal a set of resources that allow them to present their service portfolio, through the delivery of formal proposals, online meetings to present their services to potential customers, those who already have the platform in production in their organisation.

As a result of the provision of services under this position, in the form of deliverables to the client, may be considered the effective operation of the platform in the latest versions, duly adapted to the reality of the client, accompanied by various types of reports on the status of the operation of the platform.
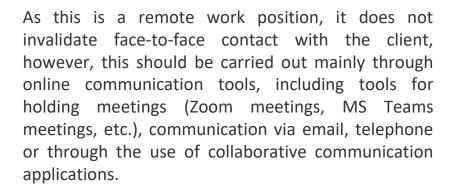
Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

As this is a remote work position, it does not invalidate face-to-face contact with the client, however, this should be carried out mainly through online communication tools, including tools for holding meetings (Zoom meetings, MS Teams meetings, etc.), communication via email, telephone or through the use of collaborative communication applications.

Work with clients to develop technology strategy on companie, to maximize profits and stay competitive in your market segment.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

The performance of a remote function, represents an added challenge insofar as the environment where it is provided may be completely de-contextualised from the function. In this sense, the people who may help this professional have different types of relationships with him, which are divided between personal and professional relationships.

As far as the personal relationships are concerned, depending on the context in which the function is carried out, those who may help the professionals perform their functions are mainly family members and friends.

In terms of professional relationships, different groups may be considered according to the type of relationship the professional has with the organisation, namely if he/she belongs to the company's staff or if he/she is outsourced. In the first case, being an employee of the client organisation, those who may help him/her are the different teams (management or IT) of the organisation itself and the support teams of the platform supplier.

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Considering the importance of these platforms for the strategic management of organisations, those responsible for their management, both technical and functional, are usually given the following benefits:

- Recognition and prestige;
- Work stimulating development;
- Organizational status;
- Team development;
- Flexible working hours;
- High demand on the labour market.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

There are some costs related to the basic training of these professionals, usually in the area of technologies, but the type of platform and the technologies in which it was developed shelter a specific investment in these technologies.

- Graduation's costs;
- Software's costs;
- Hardware's costs;
- Platform's vendors Certifications courses;
- Overheads related to remote work and meetings with:
  - Customers
  - Suppliers
  - Partners

Golden Reads

	5 GOLDEN READS FOR INTELLIGENT MANAGEMENT PLATFORMS	LINK AMAZON
#1	Kahraman, C., & Haktanır, E. (2022). *Intelligent Systems in Digital Transformation: Theory and Applications.* Springer Nature.	https://www.amazon.com/dp/B0BMFHRR21?ref_=cm_sw_r_cp_ud_dp_QZ2C20KQWQGXXB5T8XYF
#2	Kahraman, C., & Sari, İ. U. (2017). *Intelligence systems in environmental management: Theory and applications.* Springer International Publishing.	https://www.amazon.com/Intelligence-Systems-Environmental-Management-Applications/dp/3319429949
#3	Ma, K., Abraham, A., Yang, B., & Sun, R. (2016). *Intelligent Web Data Management: Software Architectures and Emerging Technologies*. Springer International Publishing.	https://www.amazon.com/Intelligent-Data-Management-Architectures-Computational/dp/3319807455
#4	Benmammar, B. (2021). *Intelligent Network Management and Control: Intelligent Security, Multi-criteria Optimization, Cloud Computing, Internet of Vehicles, Intelligent Radio*. John Wiley & Sons.	https://www.amazon.com/Intelligent-Network-Management-Control-Multi-criteria/dp/178945008X
#5	Machado, C., & Davim, J. P. (Eds.). (2022). *Sustainability and Intelligent Management*. Springer Nature.	https://www.amazon.com.br/Sustainability-Intelligent-Management-Industrial-Engineering-ebook/dp/B09ZH7BWPV

Personal Business Model Canvas

Mechanical Designer

Author: Clio Dosi, Roberta Lozzi, Matteo Vignoli (UNIBO)

Mechanical Designer | Personal Service Model

Who Helps You

- Sales technicians
- Marketing
- Suppliers
- R&D
- Legal area

What You Do

Modeling of mechanical components from a Design For Manufacturing (DFM) perspective, according to Customer requirements and R&D area needs.

Who You Are

Mechanical Designer creates technical designs and drawings for mechanical devices and equipment, creates and improves manufacturing systems or processes, and develops drawings and designs for a wide variety of machines.

Benefits You Offer

The Mechanical Designer offers the opportunity to concretize what the customer has in mind, enabling optimization of production processes and costs through the DFM technique.

Roles/Relationships

All product details are agreed upon progressively with the customer usually with the filter of the commercial to agree on the specifications of the final request.

Who You Deliver

The channels the Mechanical Designer uses are specific to the company's ICT infrastructure.
Typically she uses outlook, teams, and enterprise portals.

Who You Help

- Final customers
- Purchasing Department
- Manufacturing
- R&D

Costs and Consequences

- Continuing education;
- Responsibility;
- Travel;
- Communication.

Compensation and Rewards

- First experience (up to max 2 years): apprenticeship contract with RAL 25,500€
- More than 2 years experience: in/determined time contract with RAL 30,000-35,000€
- High experience: permanent contract with RAL 45,000-110,000€

Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities
Who you are

Mechanical Designers create technical designs and drawings for mechanical devices and equipment, work closely with engineers and other professionals to create and improve manufacturing systems or processes and develop drawings and designs for a wide variety of machines.

Depending on the study path chosen, the figure can work in different sectors: architectural services, engineering services, manufacturing, R&D. The study paths that provide access to this position are a bachelor's degree in engineering with a mechanical or electronics focus, a technical degree with subsequent two years of experience in mechanical design firms, high school diploma in mechanical or aeronautical engineering.

Hard Skills
- Knowledge of industry-specific manufacturing processes (DFM);
- Knowledge of Office package and CAD design;
- Thorough knowledge of IT;
- Mathematical and computer skills;
- Knowledge of physical principles, based on the relevant field;
- Knowledge of Solidworks;
- Knowledge of current standards in the relevant industry.

Soft Skills
- Analytical skills;
- Problem-solving skills;
- Written and verbal communication skills;
- Ability in working in a team environment;
- Be able to work flexibly;
- Ability to react to change;
- Ability to handle multiple tasks with different priorities;
- Properly receive feedback from clients and teams.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

- Modeling of mechanical components from a Design For Manufacturing (DFM) perspective, according to Customer requirements and R&D area needs.

- Drafting of relevant design documentation, including test specifications related to the Mechanical Area.

- Review update and archiving of models and drawings in PLM.

- Mechanical testing.

- Prototype design and modeling.

- Use of simulation tools.

- Quality control of machining operations with related technical support to production.

- Process analysis and improvements.

- Economic analysis of machining operations and process optimization.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

The Mechanical Designer is not in close contact with consumers and final customers, except when designing tools for B2B. In this case, the customer decides the design specifications of this job/contract together with the designer.

In other cases, and especially in B2C, the Mechanical Designer has indirect contact with the customer through feedback from other business units, such as sales engineers or after-sales.

The contact depends on how big or small the reality is: in more structured realities the technical manager goes to the customer together with the commercial who followed the order, in less structured realities the mechanical designer goes directly to understand the characteristics of the product or even to present the final product and to understand if it meets the various specifications.

Depending on her role in the company, the Mechanical Designer works for different business areas, to which she provides support and transmits value:

- **Purchasing Department** (for the supplier side): usually the purchasing department does not have a particularly technical background, so when approaching a new supplier or an existing supplier has given problems, it needs the designer's technical advice.

- **Manufacturing**: when what the designer has designed needs to be built the designer needs to be on the front line to give support to those who actually make the product, whether for the production of the individual part or the total assembly. Therefore, it is important to support production for any problems.

- **R&D**: essential collaboration to improve products and look for new solutions that may be more efficient or more cost effective or more suitable.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

The Mechanical Designer offers the opportunity to concretize what the customer has in mind, enabling the optimization of production processes and costs through the DFM technique. She plays a key role, therefore, in the realization of products, and in particular, she allows one to be able to turn intangible ideas into a tangible products.

Some opportunities for value creation are described below:

- Ability to understand the needs of the customer/end consumer.

- Ability to optimize production processes and related costs.

- Ability to first make the product visual and then tangible.

Channels
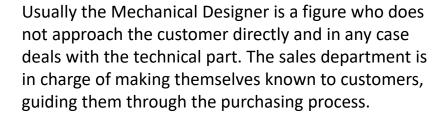
Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
    1. How will potential Customers discover how you can help them?
    2. How will they decide whether to buy your service?
    3. How will they buy it?
    4. How will you deliver what Customers buy?
    5. How will you follow-up to make sure Customers are happy?
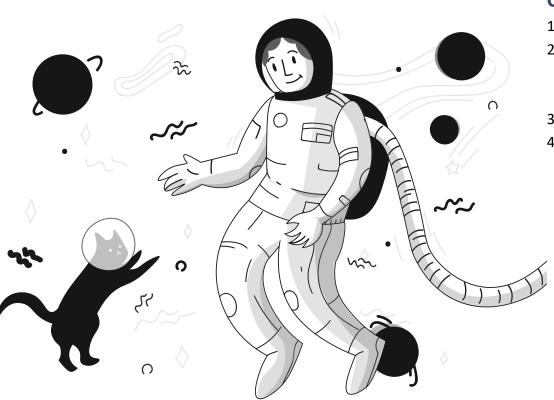
Channels
How you deliver

Usually the Mechanical Designer is a figure who does not approach the customer directly and in any case deals with the technical part. The sales department is in charge of making themselves known to customers, guiding them through the purchasing process.

The channels the Mechanical Designer uses are specific to the company's ICT infrastructure.

Typically she use outlook, teams, enterprise portals.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

All product details are agreed upon progressively with the customer usually with the filter of the commercial to agree on the specifications of the final request.

Usually the Mechanical Designer is unlikely to go and talk directly with the customer. If there is some small exchange it is usually by email, to share information about some product details.

The real customer relationship or presentation part is done either by a manager or a contact person or a technical commercial person.

Of course, it always depends on the structure of the company: if it is small, it may happen that the designer relates directly with customer.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

The main figures who help the Mechanical Designer are:

- **Sales technicians**: as far as machines and machinery are concerned, the first major help comes from the sales technicians, with whom there is a continuous collaboration. They are not pure salespeople but they are in the middle, they have a technical background but they are turned more towards the commercial side. They are the ones who have the first contact with customers and collect specifications. Depending on the structure of the company they may deal only with pre-sales or also with post-sales, collecting feedback from customers once the product has been installed.

- **Marketing**: if the company structure is different and sales technicians are not in charge of after sales, marketing once the machinery is installed goes to the customer to see how the product is doing and collects their feedback to improve the product.

- **Suppliers**: important partners because they bring technology in, hardly a company can make technology on its own so it uses tools from outside suppliers.

- **R&D**: provides guidelines for developing a product that is as efficient as possible.

- **Legal area** (sometimes it is external figures who bring advice on regulatory aspects): helps the designer define the regulations behind a product to be designed or define the certificates to be obtained to comply with product standards. It depends on what is being designed, e.g., for a machine tool, safety issues come into play and it is important that the designer knows what standards they need to consider for the design they are developing.

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Depending on experience in the field, compensation for a Mechanical Designer may vary as follows:

- First experience (up to max 2 years): apprenticeship contract with RAL 25,500 € with opportunity to convert to in/determined time contract.

- More than 2 years experience: in/determined time contract with RAL 30,000-35,000 € with opportunities for bonuses and promotions.

- High experience (no longer a matter of time of actual experience made): permanent contract with RAL 45,000-110,000 € with opportunities for major bonuses (up to +50% of RAL).

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

As with any career, the choice to pursue a particular career path gives certain benefits, both financial and personal, but it also costs something that each person has to give. In the case of the Mechanical Designer the "costs" are:

- **Continuing education**: she must always be up-to-date with the latest software and on the latest market trends.

- **Responsibility**: the launch of a new product is highly dependent on her skills, stress is her bread and butter.

- **Communication**: it's not just PC... it's critical to interact with people, be empathetic and understand them.

- **Travel**: the Mechanical Designer is not a sedentary job, she must be willing to travel to visit production facilities, to do product testing and quality control at the customer's site.

Golden Reads

	5 GOLDEN READS FOR MECHANICAL DESIGNER	LINK AMAZON
#1	Oberg, E. (2012). *Machinery's Handbook, 29th*. Industrial Press.	https://www.amazon.com/Machinerys-Handbook-29th-Erik-Oberg/dp/083112900X
#2	Norton, R. L. (2003). *Design of machinery: an introduction to the synthesis and analysis of mechanisms and machines*. McGraw-Hill College.	https://www.amazon.com/Design-Machinery-Introduction-Synthesis-Mechanisms/dp/0072864478
#3	Shigley, J. E., Mischke, C. R., Budynas, R. G. (2003). *Mechanical Engineering Design.* McGraw-Hill Science.	https://www.amazon.com/Mechanical-Engineering-Design-McGraw-Hill/dp/0072520361
#4	Erdman, A. G., & Sandor, G. N. (1996). *Mechanism design analysis and synthesis* (Vol. 1). Prentice-Hall.	https://www.amazon.com/Mechanism-Design-Analysis-Synthesis-Vol/dp/0132677822
#5	Budynas, R. G., & Nisbett, J. K. (2019). *Shigley's mechanical engineering design.* McGraw-Hill.	https://www.amazon.com/Shigleys-Mechanical-Engineering-Richard-Budynas/dp/0073398217

Personal Business Model Canvas

Mechanical Engineer

Author: Georgia Micheli, Kyriakos Lingas (MILITOS)

Mechanical Engineer| Personal Service Model

Who Helps You

Other engineers
engineering technicians

Trainers
Professional advisers

Experienced colleagues

What You Do

Perform engineering duties in planning and designing tools, engines, machines, and other mechanically functioning equipment.

Oversee installation, operation, maintenance, and repair of equipment such as centralized heat, gas, water, and steam systems.

Who You Are

Bachelor degree
Solid understanding of industry standard
Excellent computer skills
Strong analytical thinking
Communication capabilities

Benefits You Offer

Play an important role in the emerging green economy

contribute to mechatronics route (Robotics)

Make impact by innovating on the next prosthetic

Make advancements in the automotive industry

Create an invention that could literally change the world

Roles/Relationships

Leader
problem solver
decision maker

Who You Deliver
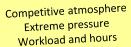
Mechanical engineers are employed by consulting firms, by power-generating utilities and in a wide range of manufacturing, processing and transportation industries, or they may be self-employed.

Who You Help

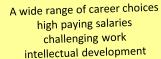Society
Every industry relies ion mechanical engineering

Costs and Consequences

Competitive atmosphere
Extreme pressure
Workload and hours

Educational requirements
coursework can be quite difficult

Compensation and Rewards

A wide range of career choices
high paying salaries
challenging work
intellectual development

A chance to make a meaningful impact

Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Interests
Who you are

Mechanical engineering is a discipline that applies the principles of engineering to the design, analysis, manufacturing and maintenance of machines. It paves the way for you to have a lucrative career that benefits you and the society. If you have a passion for Mathematics and Physics, you can choose to study mechanical engineering because it will help sharpen your skills in the design, research and manufacturing of equipment, aircraft and other vehicles. If you are interested in the following areas mechanical engineering is the path you should follow:

- **Heat Transfer, Thermodynamics and Energy Systems**

This area of interest emphasizes the fundamentals of heat transfer and thermodynamics and their application to the design of advanced engineering systems.

- **Ground Vehicle Systems**

The design of surface vehicles is an aspect of mechanical engineering that emphasizes the development of more environmentally-benign vehicles that can provide transportation while using fewer resources.

- **Biomedical and Engineering Fluid Mechanics**

This field of study is based on the fundamentals of fluid mechanics and their broad range of applications in the biomedical and engineering arenas.

- **Transportation Systems**

An important aspect of mechanical engineering is the planning, design, and operation of transportation systems.

Interests
Who you are

- **Mechanical Design**

Creating and improving products, processes or systems that are mechanical in nature are the primary activities of a professional mechanical engineer. Mechanical design involves product development from concept generation to detailed design, manufacturing process selection and planning, quality control and assurance and life-cycle considerations.

- **System Dynamics and Control**

Engineers are increasingly concerned with the performance of integrated dynamics systems in which it is not possible to optimize component parts without considering the overall system. System dynamics and control specialists study the modeling, analysis and simulation of all types of dynamic systems and the use of automatic control techniques to change the dynamic characteristics of systems in useful ways.

- **Combustion and the Environment**

Mechanical engineers are often heavily involved with the design of combustion systems (internal combustion engines, gas turbines, furnaces, etc.) and deal with aspects of combustion ranging from increasing efficiencies to reducing pollutant emissions.

- **Manufacturing**

Manufacturing is the process of converting raw materials into products. A major activity of mechanical engineers is studying and working with various production methods and techniques, integrating creative design activities into actual fabricated products.

Abilities and skills
Who you are

Abilities and Soft Skills

In addition to the degree and hard skills, mechanical engineers should have soft skills, such as strong analytical thinking and communication capabilities. Plus, they're required to have some understanding of social, environmental and economic factors.

- **Analytical Thinking**

It is the ability to investigate a problem and find the ideal solution in a timely, efficient manner. The skills required to solve problems are known as analytical skills. You use analytical skills when detecting patterns, brainstorming, observing, interpreting data, integrating new information, theorizing, and making decisions based on the multiple factors and options available.

- **Communication**

Communication skills help you to work with others effectively. Listening, which is a core aspect of communication, ensures that you understand what clients or colleagues are saying. You must be able to extract all the key information from the problems, ideas, and suggestion that people bring to you. Similar to listening, is responding. You must be able to express your ideas to other employees effectively and communicate simply to clients who may not understand mechanical engineering jargon. Communication is a major mechanical engineering soft skill that helps a mechanical engineer design and develop more efficient mechanical systems. Communication is also the foundation of healthy professional relationships between team members and with clients. Including communication skill in your resume is crucial and something that all employers value.

Abilities and skills
Who you are

Abilities and Soft Skills

- **Creativity**

Creativity skills drive your ability to be innovative. As a mechanical engineer, you must be able to come up with fresh ideas and designs that surpass old models to solve existing problems. This is essential when developing ways to build new and more efficient machines. It also sometimes involves fresh ways of maintaining existing systems. You must be able to look out for glitches and things that prevent people from being productive. These are the problems that engineers are quick to fix. Therefore, creativity is an essential skill to creating top-notch mechanical systems and succeeding in this line of work. It requires a solution-oriented imaginative ability to create something beneficial.

- **Collaboration and Teamwork**

Collaboration involves working with several other people to achieve a shared goal. Because mechanical engineering is so broad with many areas of specialization, projects often require teamwork. Collaboration yields so much success when individuals that make up the team can relate well to one another. When contributing ideas, everyone in a team can collaborate and share their thoughts, suggestions, and opinions.

Teamwork involves the division of responsibilities so that each member of a team can concentrate on a specific role. For instance, you likely need to share ideas with other professionals to develop functional and innovative ideas. Teamwork increases efficiency and quality of tasks. It's also key to use interpersonal skills to build strong working relationships with your peers to work together.

Abilities and skills
Who you are

Abilities and Soft Skills

- **Active Listening**

Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.

- **Problem Solving**

Problem-solving skills involve finding solutions to problems that arise in the workplace. As a mechanical engineer, problem-solving skills are a major aspect of the role. This is because your core responsibility is to find and develop solutions to mechanical problems. The solutions you offer need to be based on facts and verified data. Problem-solving involves being innovative, so that results improve efficiency.

- **Leadership**

Leadership involves leading a team or being in charge of managing a project. Being a leader involves sharing responsibilities with the team members, making decisions on behalf of the team, and supervising the role of each member. A major aspect of leadership is being a role model to other engineers. Your ability to inspire and drive your team members, as well as other employees in the organization, is vital to your success as a leader.

Abilities and skills
Who you are

Hard Skills

Mechanical engineers typically need a bachelor's degree in mechanical engineering or mechanical engineering technology. A master's degree or Ph.D. in mechanical engineering is a plus.

A mechanical engineer should have specific hard skills, They need to be comfortable using math to solve problems and should have effective mechanical skills:

- ### Mathematical skills

The application of mathematics is essential in mechanical engineering. This knowledge is taught and sharpened at every stage of the learning process. Mathematical skills are used to get accurate scales for the drawing of designs and measuring prototypes. The ability to identify and correct such errors is relative to how vast your knowledge of mathematics is.

- ### Mechanical Skills

Allow engineers to apply basic engineering concepts and mechanical processes to the design of new devices and systems.

- ### Computer skills

Computer skills are always necessary where software is used to design industrialized machines and for technical calculations. Mechanical engineers need to learn new software tools that will aid them to design and execute the concepts. It also helps in designing prototype products before the actual commencement of the product development.

-

Abilities and skills
Who you are

Hard skills on the job

- **Drafting skills**

Drafting skills are vital for every mechanical engineer. You first learn these technical skills during your academic training and master them with practice and on-the-job experience. Digital drafting is modern and the standard for all mechanical engineering companies and roles. However, manual drafting and sketching skills are still valuable for brainstorming with a pen and paper. Digital skills help you design, develop, test and maintain machines on a digital device. This is more efficient than manual drafting.

- **Administration and Management**

Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.

- **Education and Training**

Knowledge of principles and methods for curriculum and training design, teaching and instruction for individuals and groups, and the measurement of training effects.

- **Administrative**

Knowledge of administrative and office procedures and systems such as word processing, managing files and records, stenography and transcription, designing forms, and workplace terminology.

Personality
Who you are

Mechanical engineers score highly on **extraversion**, meaning that they rely on external stimuli to be happy, such as people or exciting surroundings. They also tend to be curious, creative and optimistic, pay attention to detail, embrace change and continuously seek for improvement.

Effective Communication

An engineer, in any industry, can have brilliant ideas for a project but if he or she cannot articulate those ideas to management, teammates, clients, and other stakeholders they are of no use. Effective engineers understand that clear, concise, written and verbal communication is the key to giving their ideas life and their team a competitive edge. Succinct communication becomes even more important in today's global business context where language and meaning often become lost in translation.

Curiosity

Children who spend hours taking apart toys just to see how they work are the kind of kids who grow up to be engineers. Engineers are curious because they want to know how and why things work as they do. For many engineers, once they have this understanding, their thinking morphs into how they can make it better, faster, and more efficient for less money!

Personality
Who you are

Creativity

Many may think that the words "creative" and "engineer" are mutually exclusive. At first glance, it would seem that in a field structured by math and science there would be little to no room for a creative spirit but when one looks more deeply, the creative engineer is changing the way we live and work as creativity often spurs innovation! It was a creative engineer who converted another glue-based project into Sticky Notes.

Attention to Detail

In engineering, beauty is often found in the details. It is where value is added to projects, errors are discovered before they become a problem, and the best innovations are found. It's not surprising, then, that successful engineers pay attention to the details.

A Collaborative Spirit

Engineers do not work in a vacuum. They work with other engineers, supply chain management, financial and project managers, and others from various business units. Engineers are tasked with contributing to collaborative and cross-functional teams to ensure integrated development. The more easily an engineer can collaborate with a team, the more likely the project or product will be successful.

Personality
Who you are

Embrace change

Nothing stands still in engineering, so it's important to be open to change. Just because something has been done a particular way for years doesn't mean it can't be improved. Successful engineers embrace new technologies, processes, and ways of thinking.

Continuously Seeks to Improve

In most fields of engineering, best practices, technologies, and the requirements of customers change fast. As a result, engineers need to be adaptable, but it is not enough to be open to change. You also need to constantly work to improve and enhance your skillset through ongoing professional development.

This can be through formal training and development programmes, but it doesn't have to be. It is also important that you explore areas of engineering that interest you personally.

Optimistic

Engineers face challenges – it's part and parcel of the job. Those challenges could be a complex problem that appears to be completely resistant to a solution, or an issue with a client that is difficult to fix. Remaining optimistic in the face of these challenges helps considerably.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Personal Key Activities

- Mechanical engineers typically do the following:

- Analyze problems to see how mechanical and thermal devices might help solve a particular problem;

- Design or redesign mechanical and thermal devices or subsystems, using analysis and computer-aided design;

- Investigate equipment failures or difficulties to diagnose faulty operation and to recommend remedies;

- Develop and test prototypes of devices they design;

- Analyze the test results and change the design or system as needed;

- Oversee the manufacturing process for the device.

Key actions
What you do

Personal Key Activities

- Mechanical engineering is one of the broadest engineering fields. Mechanical engineers design and oversee the manufacture of many products ranging from medical devices to new batteries.

- Mechanical engineers design power-producing machines, such as electric generators, internal combustion engines, and steam and gas turbines, as well as power-using machines, such as refrigeration and air-conditioning systems.

- Mechanical engineers design other machines inside buildings, such as elevators and escalators. They also design material-handling systems, such as conveyor systems and automated transfer stations.

- Like other engineers, mechanical engineers use computers extensively. Mechanical engineers are routinely responsible for the integration of sensors, controllers, and machinery. Computer technology helps mechanical engineers create and analyze designs, run simulations and test how a machine is likely to work, interact with connected systems, and generate specifications for parts.

Key actions
What you do

Examples of types of mechanical engineers:

Manufacturing Engineer

Manufacturing engineers design machines as well as products. Anything that is produced by a machine or has parts that are produced by machines rely on the knowledge of a mechanically-oriented engineer in manufacturing. These professionals who go into manufacturing can work with all types of products from food to appliances.

Process Engineer

If you are a logical thinker and like to consider how something gets accomplished, going into process engineering may be a great move after you earn a degree in mechanical engineering.

A process engineer improves the way things are done. They look to promote safety and efficiency in processing. A mechanical engineering degree major who becomes a process engineer may work in industries such as power and water supply or even the manufacturing of drugs and pharmaceuticals.

Construction Engineer

Other engineers who go into construction think through the details of how a home or building operates. They work with all the different types of mechanical systems including heating, cooling and ventilation in order to ensure that the building is safe for inhabitants and up to code.

Key actions
What you do

Automotive Engineer

Some engineers who are interested in the automotive industry can work hands-on with the mechanical design and production of vehicles. They specialize in consumer vehicles or they may work with the military. In addition, they are vital in researching new types of safety features as well as aerodynamics and alternative fuels.

Robotics Engineer

Robotics may seem like something that will be used more in the future, but many robots currently are included in the manufacturing process. Engineers with a mechanical background who go into robotics plan, build, utilize and maintain robots. These robots work in technology and design as well as in fields such as medical devices and even healthcare.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers

Who you help

Depending on what field of work you go into will depend on what your job will be like. Mechanical engineering is a broad career that deals with mechanical issues, and engineers typically work with mechanical physics, vibrations, forces, rotation, and velocity on a daily basis.

Mechanical engineers can find employment virtually anywhere where innovation takes place, and are sought out by employers within a variety of industries, such as: aerospace, automotive, chemical, construction, defence, electronics, consumer goods, marine, materials and metals, pharmaceuticals, rail, and utilities.

Mechanical engineers can also work in non-engineering types of jobs, both within and outside of the engineering industry. These can be in areas such as: finance, management, law, the military, government, medicine, research, technical sales, technical consulting, technical publishing/science journalism, and teaching.

From developing a prosthetic leg to a new child's toy, a degree in mechanical engineering gives you a diverse choice of industries and projects you can be a part of.

Mechanical engineers generally work in professional office settings. They may occasionally visit work sites where a problem or piece of equipment needs their personal attention.

Customers
Who you help

Due to the wind range of job positions/roles and considering the different sectors a mechanical engineer could contribute to, one could say that anyone could be a "customer" of a mechanical engineer.

Mechanical engineers who work on the private sector (industries or organizations) usually work in a team and deliver to their project leaders and to other companies. Usually in this case they work with other engineers from their department or with other departments and report to their team and their leaders.

It is also common for mechanical engineers to work as sales managers. In this case other companies are their immediate customers.

When mechanical engineers work on freelance or self-employed basis then they can design their own work schedules and basically get the job done alone. Their client might as well be a company or organization, but it might be a citizen as well, depending on the project the engineer undertakes.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

Making a difference

Is there another career where you can make such a direct impact on the world?

You might be helping to build a high efficiency aero engine; energy-efficient homes; life-saving medical equipment; self-driving cars, a whole new form of renewable energy. The opportunities to make a positive difference to the world are endless.

Every industry relies on mechanical engineering

Without mechanical engineering, we would not have things like engines, generators, elevators or even air conditioning. While we might not even realize it, we most likely use something that has been mechanically engineered every day.

Mechanical engineering plays a critical role in manufactured technologies, from cars to airplanes to refrigerators. It enables you to do many daily activities with ease, as it brings helpful technologies to our modern society. It is one of the most important subdivisions of engineering, because without it, many of the technologies we use every day would not be available.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
   5. How will you follow-up to make sure Customers are happy?

Channels
How you deliver

Understand Your Audience

Try to get to know your target audience – your potential new employer. If these are the people, you're marketing yourself to, you'll need to do your market research and understand what they're looking for. Do as much research as you can into organizations of interest and try to establish the skills, knowledge and types of applicants they value highly. If possible, speak to an existing or former employee to get an inside view of the company. If you do reach the interview stage, make sure you fully research the company so you can tailor your answers (and questions) to their unique or recent business activities. Most organizations now disseminate information online in various formats, so information should be easily accessible.

Be easy to find

Once you understand your audience, take time to show up everywhere your ideal clients can be found. Attend trade shows, get sponsored by associations, and join social media platforms.

Understand the search terms, products, and services they use. Engage with these things often and align yourself with where they've placed their attention, so you can be found where they are already looking.

Channels
How you deliver

Sharpen Your Skills

Reassess your skills regularly to identify any knowledge gaps that could be hampering your career progress. Look into extra training in areas where you feel you lack experience. Were you recently declined a job? Politely ask for feedback from the company or your interviewees about where your résumé or interview performance lacked impact.

Identify Your Unique Selling Points

What is unique about you in the engineering and manufacturing sector? There are probably many positive aspects to your résumé, but there are usually one or two particular points that make you stand out from competition which you can use in marketing yourself. This could be your particular mix of past work, the combination of your academic training and hands-on experience, or even relevant and intriguing personal interests that position you as someone of integrity, creativity or useful life skills that will enhance your performance on the job. Once you've identified what makes you a strong, attractive candidate with an interesting edge, sell this unique selling point in your written applications and interviews with employers.

Channels
How you deliver

Remember to Sell Your Soft Skills

With engineering and manufacturing jobs, many candidates assume that their technical know-how will be enough to secure them the best roles. But marketing yourself is about more than demonstrating technical knowledge or sector experience – it's about showing that you're a well-rounded candidate who has exceptional "soft skills," such as brilliant communication skills, leadership potential and lateral thinking.

Make an irresistible offer

If you've narrowed down your target audience, and you've shown up where your ideal clients can be found, but you're still struggling to find the right clients, it's likely they are waiting for you to pitch your offer to them. They are waiting for you to sell them something of irresistible value.

It's your job to identify what they need and provide exceptional service. The amazing thing is that you don't have to guess what they need; you only need to ask.

Build Your Network

Remember the exponential value of a broad network of contacts. The web has now made it easier to connect with and maintain relationships with various people in the engineering and manufacturing field. Keep in regular contact with your network and update them on any new positions or projects you take on. Wherever possible, attend industry events where you can meet people face-to-face and form relationships in real time—one of the fundamental and most effective tools of marketing yourself.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

During their career, engineers speak and write their ideas. While some communication tasks are completed individually, others are performed as a group. Engineers also work as project teams to write proposals and reports. Depending on their job position / role the ways to communicate with clients / customers may different. The most common ways to present / deliver a service are the following:

Design Reviews
Often, mechanical engineers participate in writing Design Reviews with design teams. Design Reviews serve as a way for teams to communicate their progress and concerns about a design. Typically, a design team includes various experts.

For example, a team designing a product might involve marketing and manufacturing experts, as well as industrial, mechanical, and electrical engineers. Writing a review allows all parties to input and critique ideas before production begins.

Poster Sessions
As an engineer, you'll participate in Poster Sessions during conferences and group meetings. A Poster Session allows you to display and discuss your work on a project or the results of your research.

Presentations
Mechanical engineers give Presentations when they work on projects and Proposals. Often, professional Presentations require you to verbally and graphically present preliminary designs to colleagues.

Customer relationships
Roles/Relationships

Lab Reports

Lab work is an important part of every engineer's training. During a lab test or experiment, you participate in a "hands-on" experience that no textbook or lecture can provide. Writing a Lab Report requires you to reflect on these experiences. Engineers write Lab Reports to describe their work in labs. As an engineer, even if you don't work in a lab, you might read and evaluate Lab Reports written by other engineers. Knowing what information to expect and how it should be presented can help you evaluate such reports.

Letters, Memos, E-mail

You might assume that as an engineer, you won't have to write business letters, memos or e-mail. This assumption is wrong! Any college instructor will tell you that these skills are necessary in industry. Every project you work on will demand that you communicate with other engineers and clients about your ideas and research.

Proposals

Engineers write Proposals to present a topic to be researched or to suggest a plan of action. Typically, consulting engineers send Proposals to other companies in order to get work. The Proposal then works to convince its recipient that a particular engineer or firm is the right choice for the job.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

Mechanical engineers work alone and in groups, but it may not be in the way that you think!
In most settings, they work with other engineers, engineering technicians, and other professionals as part of a team. Being an excellent team player helps you collaborate with your team and helps you do your job successfully.

Continuing education is currently not a requirement for Mechanical Engineers; however, most Engineers take continuing education courses to stay up to date with the latest developments in the field. Engineers must also keep up to date with environmental laws and the latest technological improvements to properly do their jobs.

Learning from others is essential for your professional growth. Stay close to experienced colleagues follow their methods, to avoid making rookie mistakes and get inspired when you're stuck, or everything seems overwhelming.

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

A career in mechanical engineering allows you to build a better future for you, and for the world!
Why is that? The benefits and revenue for being a mechanical engineer are various and really significant:

Wide range of career choices:

Mechanical engineers work all over the world, in countless industries; Becoming a mechanical engineer could take you to some interesting places – oil rigs, deserts, the Antarctic, the deep sea. Mechanical engineering qualifications and experience are like having a passport to work in many different industries and countries.

High paid salaries:

The yearly average salary of a Mechanical Engineer may vary from country to country:
Greece: 28.908 €
Germany: 62.716 €
UK: 32.202 £
USA: $80064
Since the average salary depends on the country as well as on the experience it may reach on some occasions 100.000 €.

Revenue
What you get

Challenging work:

Mechanical engineers lead on and develop new technologies, so you'll be at the heart of the process. The fast development of the technological world means that your studies, as well as your career, are unlikely to be boring. Designing products for a range of industries such as robotics, transport, construction and healthcare, you can make a positive and significant impact on the world.
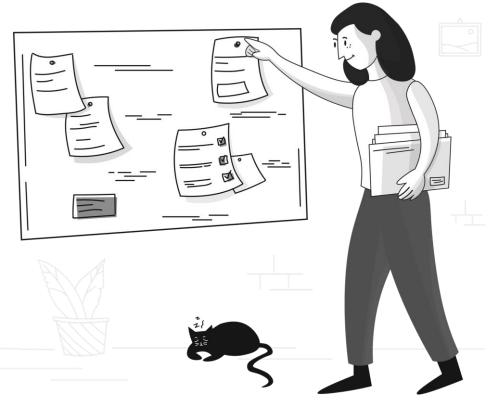
A chance to make a meaningful impact:

Perseverance and hard work combined with your knowledge in mechanical engineering could enable you to change the world. As a mechanical engineer you may contribute in:

- The energy solution. Society of today badly needs more power. We have huge shortage of electricity, especially in underdeveloped countries. Prices of fuel oil are going up. As a Mechanical engineer you need to find a green way to generate power.
- The transportation solution. Millions of people die every year while traveling. Safety has to be priority while designing new vehicles.
- Cost effective products. There are many who can't afford to buy basic things that are required for day-to-day living. You need find better machines and processes that will reduce prices.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Competitive atmosphere

Although mechanical engineers do receive favorable advancement opportunities, generally these don't come easy. It is difficult for new graduates to get placed in good companies unless there are some very good colleges or have great skills. The best paying jobs in the field often come from large or multinational corporations whose working environments have become increasingly competitive due to recent economic conditions.

Fresh graduates start out as low as assistant or associate engineers and undergo thorough training and evaluation for a year or two after which a few get promoted. Promotions are heavily performance-based. As an engineer gets bumped up to a higher-level competition gets more serious. Also, it is very well known that good companies don't like to recruit new mechanical engineers, they like the experienced ones.

Educational requirements

The minimum requirement for entering the field is a bachelor degree in mechanical engineering or a closely related subject course. Undergraduate studies must cover math, physics, chemistry, solid and fluid mechanics, thermodynamics, material science, process control, and equipment design. These would help a fresh graduate get a job, but may not be sufficient to guarantee a career. Companies encourage their engineers to take Graduate Studies, often offering tuition subsidies and promotion opportunities as incentives. This is done over and above the necessary short courses, seminars conferences and development classes required to keep engineers current.

Costs
What you give

Coursework can be quite difficult

If you don't have the aptitude for it then you might not be able to get through the study phase. You can easily get bored if you're not interested in this field, also the amount of stuff you learn at the university is negligible to what you do in industry. In industry, you'll probably solve a problem that has never been encountered before.

Extreme pressure

With great importance comes significant job pressure. The projects you head up as a mechanical engineer are sometimes massive and scope and budget. Significant failures can lead to losses for your company or a raise and the company's insurance premiums. Problems with your work can hurt your employer's reputation or your own. There are a lot of costs and risks involved in the job. Hence, there's a lot of pressure as liability can become high on errors.

Workload and hours

Another downside and mechanical engineer faces are the unpredictability of his workload. Your work may vary from week to week for instance in a manufacturing plant. A mechanical engineer does routine maintenance and process control work in one week while the next week sees him working on another project. A more dynamic person may find this interesting but for someone who prefers a routine workload may find it difficult to handle.

Golden Reads

	5 GOLDEN READS FOR MECHANICAL ENGINEER	LINK AMAZON
#1	Oberg, E. (2012). ***Machinery's Handbook, 29th.*** Industrial Press.	https://www.amazon.com/Machinerys-Handbook-29th-Erik-Oberg/dp/083112900X
#2	Budynas, R. G., & Nisbett, J. K. (2019). ***Shigley's mechanical engineering design.*** McGraw-Hill.	https://www.amazon.com/Shigleys-Mechanical-Engineering-Richard-Budynas/dp/0073398217
#3	Avallone, E. A., Baumeister, T., Sadegh, A. M. (2006). ***Marks' Standard Handbook for Mechanical Engineers*** (11th ed.). McGraw-Hill Professional Pub.	https://www.amazon.com/Marks-Standard-Handbook-Mechanical-Engineers/dp/0071428674
#4	Callister Jr., W. D., Rethwisch, D. G. (2018). ***Materials Science and Engineering: An Introduction***. Wiley.	https://www.amazon.com/Materials-Science-Engineering-Introduction-10th-ebook/dp/B07BNZ1GW1
#5	Sanghi, S., Beer, F. P. (2017). ***Vector Mechanics for Engineers: Statics and Dynamics (Mechanical Engineering).*** Mc Graw-Hill.	https://www.amazon.it/Vector-Mechanics-Engineers-Statics-Dynamics/dp/9385965026

Personal Business Model Canvas

Nurse

Author: Clio Dosi, Roberta Lozzi, Matteo Vignoli (UNIBO)

NURSE | Personal Service Model

Who Helps You

Public entities

Hospital companies

Private organizations

Private structures, large companies, ONLUS

What You Do

The nurse cares for the patient, plans and delivers care services, evaluates and monitors the impact of care activities, educates the patient, participates in refresher courses, and trains and manages support staff.

Who You Are

The nurse is a professional who cares for the whole user and builds a relationship of trust with her in the process of caring for, maintaining and/or restoring a state of health

Benefits You Offer

Emotional support by managing her own involvement

The user's quality of life by offering technical, relational and educational assistance

Shared program of intervention strategies based on priorities and guidelines and possible medical interventions

Roles/Relationships

Mediator between the user, family, hospital services and local services

Who You Deliver

Patients and his family members and Doctors, including medical specialists, physiotherapist and speech therapist

Who You Help

Doctors and medical specialists

Patients and their family

Colleagues

Costs and Consequences

Professional nursing knowledge and continuous learning

Emotional support

Ability to handle stress

Time and Energy

Compensation and Rewards

Wage income determined by shift, salaries and vacation with pay
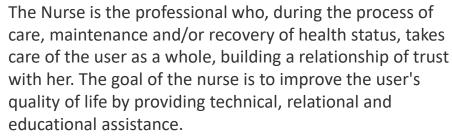
Emotional rewards you can receive from caring for patients

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Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities
Who you are

The Nurse is the professional who, during the process of care, maintenance and/or recovery of health status, takes care of the user as a whole, building a relationship of trust with her. The goal of the nurse is to improve the user's quality of life by providing technical, relational and educational assistance.

The Nurse performs a function of promotion, prevention and care aimed at the community.

In the relationship with the individual user, she becomes a mediator between the user herself, the family, the general practitioner, hospital services, and local services, fostering the development of continuous processes of care and assistance.

Hard skills:

- Apply methods of taking charge of the assisted person and her family in the different care contexts and management techniques of communication with the patient.
- Apply nursing care intervention planning and performance delivery techniques.
- Apply emergency resuscitation intervention procedures and interpretative criteria to identify morbid processes and clinical manifestations.
- Apply techniques for detecting and monitoring the needs and the psycho-physical state of health of the patient.
- Apply first aid techniques.

Skills, abilities
Who you are

Hard skills:
- Apply drug delivery techniques, procedures for carrying out dressings and procedures for performing instrumental examinations.
- Apply methods of preparation and assistance for diagnostic examinations and surgical interventions.
- Use basic medical equipment and procedures for sanitizing, sanitizing and sterilizing environments, materials and equipment.
- Apply support techniques to the non-self-sufficient user in maintaining residual capacities and functional recovery.
- Apply methods for verifying health interventions, techniques for collecting epidemiological data and using IT tools for recording data relating to health interventions.
- Apply statistical data analysis and document drafting techniques.

Soft skills:
- Teamwork.
- Empathy and patience.
- Apply techniques for detecting social and health care needs.
- Apply support techniques to personal hygiene and to the activities of mobilization, walking and transport of the non-self-sufficient user.
- Apply management techniques of individual assistance interventions, adapting to cultural diversity.
- Apply techniques of interaction with the patient, of socio-health counseling, demonstrating the ability to identify and disidentify with the patient.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Responsabilities

The Nurse is constantly in contact with the illness and suffering of others, users and family members, to whom she has to offer emotional support by managing her own involvement.

The nurse can be useful in both public facilities and private organizations.

Depending on the job, there are different activities and responsibilities, which can hardly all be performed by the same profile, which may be:

Takes charge of the patient

She meets and welcomes the user and her family, creating a positive, trusting relationship. She communicates with the user in order to observe the conditions and understand the user's needs and plan a course of care and assistance. She identifies, analyzes, and assesses care needs, prioritizing and targeting care.

Plan care benefits

She programs the technical, relational and educational activities to be carried out by preparing individualized and shared plans for each user in relation to the clinical situation and cultural diversity. The goal is the active participation of the subject in the treatment path. She plans performance in a team and multi-professional context.

Ensures application of services

Ensures proper application of medical prescriptions and documents in medical records the services performed.

Key actions
What you do

Responsabilities

Provides welfare services
She applies the technical, relational and educational interventions provided for in the care plan ensuring maximum accuracy in performance and trying to optimize the use of the material and human resources available. She guarantees the correct application of medical prescriptions and documents the services performed in the nursing record.

Evaluate and monitor the impact of care activities
She carries out continuous monitoring of the user's health conditions and clinical and emotional reactions to treatments, if she identifies alarm bells that signal the onset of problems, takes action on the care plan. She also checks the correct functioning of the machinery and the suitability of the material used.

Educate the patient and family members
She carries out an activity of promotion of health education and prevention aimed at the community. She pursues the objective of bringing out in the individual user and in the family the energies and resources necessary to deal with the disease situation.

Becoming a researcher
With a dedicated pathway can become a researcher (Evidence Based Nursing).

Participates in training courses for support figures, offers to supervise internships of students and new hires
Interacts with the team in analyzing and formulating solutions to problems, encouraging discussion among colleagues and with other professionals.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

Patients and their family
She has to provide professional medical care to patients and offer them emotional support.

The Community
The role of the community nurse is becoming increasingly important in recent years.
The Nurse is a figure with specialized skills in primary care and she works in close synergy with the physician and hospital and community network providers to help the patient manage a chronic illness or disability.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

The main value offered by the nurse is to create a glue between the various disciplines involved in the care of the sick person by taking care of the patient. The nurse determines a stable point of reference for the patient

Has the role of educating the patient in an individualized process of care to make the patient autonomous with respect to her disease condition.

One of the values offered by the nurse is to make sure that treatments are followed successfully by providing professional medical care.

It is also important to provide physical medical support and emotional support to patients and their families.

Some of the possible opportunities that exist to create value are discussed below:

Take charge of the patient:
the Nurse meets and gets to know the patient, she builds a positive and trusting relationship and observes the patient's condition and symptoms, provides information about services and treatment. She takes the patient's history, describes the person's problems, and builds a trusting relationship.

Provide welfare services:
the Nurse provides accurate services and seeks to avoid the occurrence of complications, ensures the proper implementation of requirements, optimizes and manages material and human resources in care processes, adapts care to different patients, environments and cultural backgrounds. She also deals with personalized care, technical, relational and educational interventions, nursing file.

Evaluate the impact of the activities:
the Nurse verifies the impact of activities on the patient's quality of life, monitors patient responses, and identifies any complications or adverse reactions.

Educate the patient, caregivers and family members:
the nurse is responsible for educating the patient and her family to manage critical situations, educating the patient and her family on prevention, and educating the community on a healthy lifestyle.

Train and manage the support staff she works with:
she participates in training and internship activities for support figures and future nurses and collaborates with colleagues and other professionals.

Value proposition
Benefits you offer

Provide welfare services

The Nurse provides accurate services and seeks to avoid the occurrence of complications, ensures the proper implementation of requirements, optimizes and manages material and human resources in care processes, adapts care to different patients, environments and cultural backgrounds. She also deals with personalized care, technical, relational and educational interventions, nursing file.

Evaluate the impact of the activities

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Train and manage the support staff she works with

She participates in training and internship activities for support figures and future nurses and collaborates with colleagues and other professionals.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
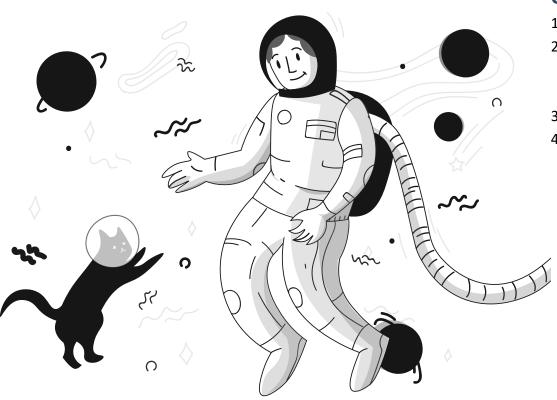   5. How will you follow-up to make sure Customers are happy?

Channels
How you deliver

By providing professional care and services, regularly assessing and monitoring the nursing situation and the impact of nursing activities, by educating patients and their families, and caring for colleagues, convey their professional value.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

Depending on the task performed may work with:

- **Doctors and medical specialists**
For assistance for operation or surgery, it could include face-to-face interaction, and written communication in the professianal infomational system.

- **Patients and their family**
Face-to-face interaction is the most direct way to reach the medical assistance support.

- **Colleagues**
"Hands-off" written communication might be the best way to communicate and changing informations and medical need during work.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

Depending on its activity, it may relate to:

Physicians and health professionals from other disciplines:
The nurse's role in interfacing with the various medical and health care professionals is through continuous confrontation with the sharing of goals to be achieved in care planning both through communication and through clinical and nursing record compilation

Colleagues
The role of the nurse includes the need to be able to work in a team and to have leadership and interpersonal skills.

Nursing Association Professional Order:
Provide protection and education for nurses and nursing professionals.

Medical public entities
Local Health Authorities, Hospitals, Hospitalization and public care facilities.
In different care areas, these kind of Medical public entities can provide infrastructure and professional equipment to make sure Nurses can doing there work without any apprehension.

Private organizations
Even in private structures the assistance areas are classified as in the public. There are three types of private structures: hospital outpatient, residential or semi-residential structure. Some private facilities specialize in offering specialized assistance to particular types of patients (e.g. facilities for the elderly, drug addict communities, etc.).

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Remuneration

Remuneration includes regular annual salery or hourly wage, vacation time, stock options, malpractice coverage, stipend or allowance for continuing education, bonuses, number of hours worked, and health benefits.

Salaries range from 2,260 EUR (lowest average) to 6,790 EUR (highest average, actual maximum salary is higher). Salaries vary drastically between different Nursing careers.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Professional nursing knowledge and continuous learning

A good Nurse needs to have a bunch of specialist knowledge and general medical knowledge, such as principles of general and clinical nursing, nursing methodology, Evidence-Based Nursing Methodology (EBM), and must continue to stay informed regarding new knowledge and techniques.

Time and Energy

To be a good Nurse, it is necessary to focus on her work, which means a lot of time and energy, she has to communicate with patients and their families, and she has to assist doctors and her colleagues.

Ability to handle stress

In medical entities, there are always emergency cases, which require the Nurse to have the ability to handle stress and handle different situations; one must be able to adapt to a high-stress work environment.

Emotional support

A good Nurse must be able to provide emotional assistance to her patients, which means she must take her patients seriously, she must provide emotional assistance to help them cope.

Golden Reads

	5 GOLDEN READS FOR NURSE	LINK AMAZON
#1	Nightingale, F. (1992). ***Notes on nursing: What it is, and what it is not***. Lippincott Williams & Wilkins.	https://www.amazon.com/Notes-Nursing-What-Not/dp/1934451843
#2	Brown, T. (2016). ***The shift: One nurse, twelve hours, four patients' lives.*** Algonquin Books.	https://www.amazon.com/Shift-Nurse-Twelve-Hours-Patients/dp/1616206020
#3	Gutkind, L. (Ed.). (2013). ***I Wasn't Strong Like This When I Started Out: True Stories of Becoming a Nurse.*** Underland Press.	https://www.amazon.com/Wasnt-Strong-Like-This-Started/dp/1937163121
#4	Watson, C. (2018). ***The Language of Kindness: A Nurse's Story.*** Crown.	https://www.amazon.com/Language-Kindness-Nurses-Story/dp/152476163X
#5	Brown, T. (2019). ***Critical Care: A New Nurse Faces Death, Life, and Everything in Between.*** Harperone.	https://www.amazon.it/Critical-Care-Nurse-Everything-Between/dp/0061791547

Personal Business Model Canvas

Occupational Trainer

Author: Soledad Domene, Juan A. Morales, María Puig,
Margarita Rodríguez (US)

Occupational Trainer | Personal Service Model

Who Helps You

University-Faculty

Work experience centres (companies)

Public vocational qualification bodies

Private companies

What You Do

Training needs analysis
Design of training plans
Development of training programmes
Management of training: time, space, resources
Trainer of trainers

Who You Are

Cross-cutting competences
Specific competences

Benefits You Offer

Professional development

Lifelong learning

Social responsibility, active citizenship, social cohesion

Roles/Relationships

Alumni
Public and private bodies
Social agents

Who You Deliver

Plans and programmes
Direct contact
Electronic collaboration
Training follow-up

Who You Help

Persons aged 16 and over who need to improve their vocational qualifications

Costs and Consequences

Availability
Permanent training
Pedagogical updating

Stress
Time pressure
Continuous changes
Training regulations

Compensation and Rewards

Social responsibility
Active citizenship

Social cohesion
Flexibility and Creativity

Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities
Who you are

A job occupational trainer is a professional who helps unemployed people find work. Either from the public administration or from the private sphere. The employment counselor acts as an intermediary between the person seeking employment and the offer available in the labor market. Her job is to match the demand of the job seeker with the position that best suits their characteristics.

General competences

Know and assess the social, political and legislative context of training for employment.

Demonstrate knowledge, reflect and position themselves regarding the concepts, approaches and processes of vocational training. Integrate in their practice different approaches and perspectives of situations related to personal, social and professional development. Apply a critical attitude in their professional practice. Elaborate their own professional and life project and develop skills and attitudes for "being-a-project". Show sensitivity to the problems related to equal opportunities. Value lifelong learning processes.

Specific competences

Know and identify the factors that intervene in training processes, in career development, in decision-making and in the development of professional and life projects. Design techniques and procedures for the diagnosis and assessment of needs and professional development. Plan professional training actions, services and programmes. Guide professional decision-making in the elaboration of training and professional insertion and development plans. Design and develop methodologies for vocational training. Design, develop and use training techniques and procedures aimed at groups with labour integration difficulties.

Design and carry out training monitoring, evaluation and auditing processes. Know transition processes and use them to enhance personal and professional development. Design and apply information collection and data analysis techniques applied to research in training and guidance for employment. Critically analyse and assess research in training for employment.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Key Actions:

- Training needs analysis
- Design of training plans
- Development of training programmes
- Management of training: time, space, resources
- Trainer of trainers

The main task of a job occupational trainer is to help the job placement of unemployed people, which takes the form of different functions:

- Offer professional guidance. To job seekers, advising them on the sectors or niches in which their professional profile is most in demand.
- Advise employers. In your search for workers suitable to your needs.
- Develop an individual and personalized itinerary. For each person who seeks to improve her employability, offering her courses to cover her training gaps, helping her prepare her resume, teaching her techniques for active job search and accompanying her throughout the search process.
- Help candidates. To know yourself, enhance your professional skills and discover new ones.
- Develop specific programs For groups with labor insertion difficulties, such as women, over 45 years of age, people with disabilities, minorities, etc.
- Promote the entrepreneurial culture and advise. To those who seek a job on self-employment and entrepreneurship options.
- Report on the labor market situation. Job placement programs, available aid, etc., is another of the functions of a job counselor.

Key actions
What you do

Training needs analisis
Training needs studies: Design and methodology. Evaluation of training methodologies. Evaluation of the impact of training.

Designing training plans
Bases for programme design Training methodologies Training evaluation Training organisations .
Pedagogical bases for the integration of Information and Communication Technologies (ICT) in training processes for work. Technologies to be used in vocational training. Design, production and evaluation of ICT for work training. Telematic networks for training and the web 2.0 movement.

Developing training programmes
Life transitions: elements of personal and professional development. Phases in the elaboration of the professional project. Systemic-ecological perspective. Methodology for the elaboration of professional and life projects. Techniques and strategies for the elaboration of the professional and life project.

Training management: times, spaces, resources
Training and work in the knowledge society Training systems for work Training contexts (formal and non-formal) Training policies and plans: Planning. Agents and professional roles in training The professional profile of the trainer.

Trainer of trainers
Diagnosis of teachers' training needs. Plans training activities adapted to individual and collective needs. Develops training activities. Participates in the evaluation of the training provided. Participates in the evaluation of the training centre. Designs didactic and technological means and resources. Promotes research on practice. Supports and disseminates innovation.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (project leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

Persons from 16 years of age who need to improve their professional qualification

Current situation of the labour market: Documentary sources and statistics. Work and personal identity: Lifelong learning. Work and life development. Employment policies and the labour market. Occupational profiles and the labour market. Lifelong career development Concept and functions of career development training. Factors and models for career development. Areas of vocational training Vocational training services and programmes The professional profile of the trainer.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

Professional development

Professional development is a continuous process marked by the employee's desire for self-improvement. That is, when an employee over time accumulates, enriches and improves his or her experiences, skills and relationships at work. Career development is a very important aspect of a person's life. Rewards and benefits are obtained only when a person is able to develop the career. Career development helps people to develop their skills and improve their performance.

Lifelong learning

Lifelong learning is an organising principle of all forms of education (formal, non-formal and informal) with better integrated and interrelated components. It is based on the premise that learning is not confined to a specific period of life, but goes "from cradle to grave" (horizontal sense), considers all contexts in which people live together such as family, community, work, study, leisure, (vertical sense), and assumes humanistic and democratic values such as emancipation and inclusion (deep sense). It emphasises ensuring relevant learning (and not only education) beyond the school system.

Social responsibility, active citizenship, social cohesion

Belonging to different networks that seek to promote social responsibility and transmitting our knowledge to any organisation that needs it, contributing to the transformation of society. The concept of active citizenship involves working towards the development of the community through participation to improve the quality of life of all members of the community by promoting social cohesion.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
   5. How will you follow up to make sure Customers are happy?

Channels
How you deliver

Plans and programmes
They design and implement the specific training actions in each specific context, in which they intervene by developing them. It is an operational type of planning that aims to express in advance what and how the training actions will be in the short term in specific areas and with specific target groups.

Direct contact
In order to plan training actions we will take into account the group of people to whom these actions are addressed, a group aged between 16 and 65 years old. In this wide age range that constitutes adulthood, there are a series of differences that must be taken into account when providing training, attitudes and/or positive or negative traits that are part of the special psychology of adults. Attitudes such as resistance, interest, curiosity, impatience, responsibility, emotionality, motivation and verification or evaluation.

Electronic collaboration
Discussion groups that revolve around a particular topic or activity Trainers build relationships with their colleagues. Information banks, using databases and search engines to organise and retrieve information. Document sharing, displaying documents on-line for discussion through on-line meetings. Synchronous communications such as videoconferencing and/or chat. Online courses or workshops.
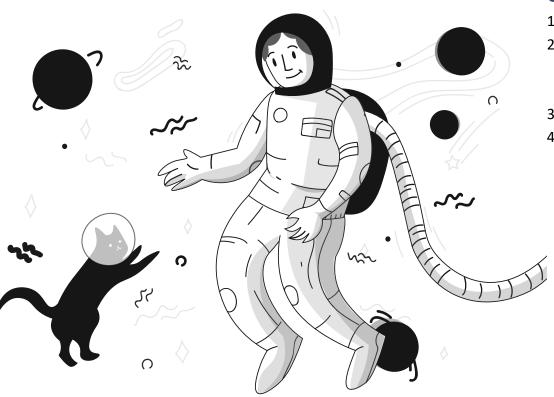
Training follow-up
Reports on results of satisfaction questionnaires for trainees and trainers, direct observation, training session reports

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" - written communication (e.g. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

Alumni

Interactions will take place with the students, those people who require a professional qualification to enter the labour market or who, being in the labour market, are looking for retraining, updating, recycling or specialisation..

Public and private bodies

Training-employment organisations, in activities related to new sources of employment of general and social interest, promoted by public or private non-profit organisations, thus facilitating their subsequent integration into the labour market, both in paid employment and through the creation of business or social economy projects. As well as in the qualification of professionals in different employment sectors.

Social agents

Institutions, groups, associations and organisations that directly or indirectly contribute to the socialisation process and can intervene in work training policies..

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - ADVICE,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

University-Faculty

The Faculties, as bodies in which degrees related to this figure that lead to the acquisition of the competences of the occupational trainer are taught, are one of the main support agents. In them, the studies that lead to the necessary qualification to be able to exercise the profession are developed, thus providing the necessary knowledge and skills for the professional future.

Work experience centres (companies)

University services or units such as: Administration and services personnel, Training Services, Internship and Employment Secretariats, Knowledge Transfer and Entrepreneurship.
External centers such as: Foundations, Unions, Associations, Town Halls, Federations, etc.

Public and private vocational qualification bodies

The vocational training system for employment in the workplace aims to promote and extend among companies and employed and unemployed workers training that improves the employability and professional and personal development of workers, and that responds to the needs of the productive system and business competitiveness, contributing to a productive model based on knowledge.

Private company

The duration, contents and requirements for the delivery of the training actions will be determined by the companies themselves.

Revenue and benefits

Revenue and Benefits Include:
1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Social responsibility, active citizenship and social cohesion

It is interesting to consider the role of the occupational trainer as socially responsible, acting as a social cohesive, promoting active citizenship through flexibility and creativity. Belonging to different networks that seek to promote social responsibility and transmit our knowledge to any organization that needs it, contributing to the transformation of society. The concept of active citizenship implies working for the development of the community through participation to improve the quality of life of all members of the community, promoting social cohesion.

Salary

The salary of an occupational trainer ranges between 28,000€ and 68,000€ a year.

Flexibility and creativity

The work of the occupational trainer is characterised by flexibility and creativity. They develop their creativity on a daily basis and require it in order to be able to respond to the professional challenges they face by responding to and making decisions in the face of continuous changes in society and employment policies. At the same time, its work is flexible, allowing the adaptation of programmes to different populations and contexts.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Availability

The occupational trainer is a professional who is always available to contribute to the development of his or her students by managing the personal concerns and situations of adults. This availability can generate tensions and limit personal time.

Permanent training

Continuous training is a real need that occupational trainers face in order to be able to respond to the continuous challenges of their day-to-day work. It is therefore a requirement derived from their work which they must meet in order to guarantee the quality of their work. It implies the updating of methodologies and didactic strategies for working with an adult population.

Stress

The stress of daily challenges and the bureaucratic burden is one of the main obstacles for these professionals as well as time management.

Continuous changes in training regulations

Although the objective of these training actions has been the same since their beginnings, since they are aimed at pedagogically qualifying all those professionals, whether or not they are unemployed, to exercise the occupation of teacher in non-regulated training, by means of an official qualification, where their competences and skills will be validated to carry out a job, throughout the last decades there have been changes both in the denomination and in the responsibilities of training.

Golden Reads

	5 GOLDEN READS FOR OCCUPATIONAL TRAINER	LINK AMAZON
#1	Stolovitch, H. D., & Keeps, E. J. (2011). *Telling ain't training*. American Society for Training and Development.	https://www.amazon.com/Telling-Aint-Training-Expanded-Enhanced/dp/1562867016
#2	Pollock, R. V., Jefferson, A., & Wick, C. W. (2015). *The six disciplines of breakthrough learning: How to turn training and development into business results.* John Wiley & Sons.	https://www.amazon.com/Six-Disciplines-Breakthrough-Learning-Development/dp/1118647998
#3	Noe, R. A. (2019). *Employee Training & Development.* McGraw-Hill Education.	https://www.amazon.com/Employee-Training-Development-Raymond-Noe/dp/1260565637
#4	Joshi, P. (2017). *Understanding Trainers Implementing their Occupational Skill in Delivering Training*. Lambert.	https://www.amazon.com/Understanding-Trainers-Implementing-their-Occupational/dp/6137337367
#5	Beebe, S. A., Mottet, T. P., & Roach, K. (2003). *Training and development: Enhancing communication and leadership skills.* Pearson.	https://www.amazon.com/Training-Development-Enhancing-Communication-Leadership/dp/0205332439

Personal Business Model Canvas

Primary Education Teacher

Author: Soledad Domene, Juan A. Morales, María Puig, Margarita Rodríguez (US)

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Primary Education Teacher | Personal Service Model

Who Helps You

- University- Faculty
- Educational Administration
- Educational centres- Schools
- Colleagues

What You Do

Design, plan and evaluate teaching and learning processes, promote coexistence in and out of the classroom, actively participate in the organization and management of the school, reflect on classroom practices

Who You Are

Hard competences: Basic training on teaching-learning processes
Soft competences: critical thinks, patience, communication, Interest in knowledge and culture, creativity, leadership, teamwork.

Benefits You Offer

- Development of key competencies in the students
- Accompaniment and guidance to families
- Improving education

Roles/Relationships

Teaching staff
Students
Educational centres

Who You Deliver

Direct contact
Meetings
Marks
Organisational documents
E-mail and other online communications

Who You Help

- Children 6-12 years old
- Educational Administration

Costs and Consequences

- Availability
  Lifelong learning
  Pedagogical updating

- Stress
  Time pressure
  Pressure from the Educational Administration
  Conflicts

Compensation and Rewards

- Vocation
  Interaction with the educational community
  Flexibility
  Creativity

- Salary
  Social recognition

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Personal Key Resources

Personal Key Resources include who you are:

- Hard skills
- Critical thinking
- Patience
- Communication
- Interest in knowledge and culture
- Imaginative thinking/creativity
- Leadership
- Teamwork

Skills, abilities

Who you are

The **Primary Education Teacher** is a creative and dynamic person who has a great interest in children. He/She likes to work in groups and is a good communicator. The Primary Education Teacher is an organized person, willing to learn throughout life and with a great cultural background. Teaching is her/him vocation and he/she loves to design activities and resources for children to learn in a fun and dynamic way.

Skills, abilities
Who you are

Hard skills

Basic training on learning and personality development of children in the period from 6 to 12 years of age; educational processes and contexts related to this period and key aspects of the interaction between society, family and school.

Didactic-disciplinary training, learning of Experimental Sciences, Social Sciences and Mathematics; learning of Languages, Musical, Plastic and Visual Education and Physical Education.

Practicum, school internships and end-of-degree work.

Critical Thinking

Critical thinking is the capacity we have to analyze and evaluate existing information on any subject. It is a complex type of thinking that allows us to reflect and generate new answers. It requires processes of analysis, inference, evaluation and deduction. The development of critical thinking is essential in a Primary Education teacher, since it constitutes a key figure through which students will get to know the world and learn to relate to knowledge.

Patience

Every teacher must be patient. Patience is the virtue of waiting, of knowing how to give each thing its time. The primary school teacher faces a group of diverse students and must be patient in order to respect the rhythm of each one of them. In addition, patience helps to tolerate adversities and face them with serenity and calm.

Communication

It is the capacity of language to express and transmit ideas and feelings through speech. The inherent elements of communicative competence are the knowledge, skills, attitudes, values and behaviors necessary to establish positive communication and interpersonal relationships. The Primary Education teacher must show high communicative skills, favoring interactions with his/her students, as well as with families and classmates. Closely related to the ability to express, is the ability to listen, as another essential piece of the communicative skills. A good teacher must know how to listen, attending to the needs expressed by his or her students, families and peers.

Skills, abilities
Who you are

Interest in knowledge and culture

The teacher is the person in charge of bringing knowledge and culture closer to the students. He/she must, therefore, show attitudes of interest towards them, so that his/her motivation and interest are transmitted to his/her students. This interest will allow the teacher to be updated and always look for the best way for his students to interact with knowledge and culture.

Creativity

Creativity is the ability to produce original answers to a problem. It is the ability to discover new alternatives, to use one's imagination. Primary school teachers need to be creative in order to respond to the diversity of situations and students they encounter daily in the classroom. Facing the challenges of today's education requires a good creative capacity.

Leadership

Leadership is the ability of a person to influence, motivate, organize and carry out actions to achieve their goals and objectives involving individuals and groups within a framework of values. The teacher, as a leader, must be the engine of social change, a person committed to society who promotes values such as respect, tolerance and freedom. When teachers have good leadership skills, they transmit to their students the confidence, hope, enthusiasm, commitment and positive energy to achieve their learning.

Teamwork

Teamwork is essential in the day-to-day life of a primary school teacher. Working in a team means sharing with others, building together and jointly seeking solutions to problems that may arise. The teacher does not work alone, but is surrounded by colleagues or students with whom he/she teaches and learns. With them he/she must work as a team, striving together to achieve the same objectives that guarantee quality teaching. In addition, the teacher of Primary Education must work as a team with the families of the students, offering them their guidance to row in the same direction.

Personal Key Activities

Personal Key Activities include what you do:

- Design, plan and evaluate teaching and learning processes, both individually and in collaboration with other teachers and professionals of the school.
- Promote coexistence in and out of the classroom.
- Actively participate in the organization and management of the school.
- Reflect on classroom practices.
- To know and apply information and communication technologies in the classroom.
- Assuming the educational dimension of the teaching role.

Key actions
What you do

Design, plan and evaluate teaching and learning processes, both individually and in collaboration with other teachers and professionals of the school.

The Primary Education teacher must know the curricular areas of this stage, the interdisciplinary relationship between them, the evaluation criteria and the body of didactic knowledge about the respective teaching and learning procedures. All this will be the basis on which to design, plan and evaluate didactic proposals that promote the integral development of students and the development of basic competencies.

The teacher must, in turn, deal effectively with language learning situations in multicultural and multilingual contexts. Encourage the reading and critical commentary of texts from the various scientific and cultural domains contained in the school curriculum.

In addition to all this, the teacher must identify and plan the resolution of educational situations that affect students with different abilities and different learning paces. For this, it is essential that teachers know the characteristics of their students, as well as the characteristics of their motivational and social contexts. Thus, he/she must master the necessary knowledge to understand the personality development of his/her students and identify learning difficulties, collaborating in their treatment.

Promote coexistence in and out of the classroom.

The teacher must foster a good climate of coexistence inside and outside the classroom. It is up to him/her to solve discipline problems and contribute to the peaceful resolution of conflicts. The teacher must design and regulate learning spaces in contexts of diversity and that attend to gender equality, equity and respect for human rights that make up the values of citizenship education. Thus, it must promote actions of education in values oriented to the preparation of an active and democratic citizenship.

In addition to all this, in order to guarantee a good coexistence, the teacher must promote cooperative work and individual work and effort, as well as perseverance and personal discipline in students.

Actively participate in the organization and management of the school.

Teachers must be familiar with the organization of primary schools and the diversity of actions involved in their operation. Their active participation in this operation is essential, therefore, they must play an active role in the definition of the educational project and in the general activity of the center according to quality management criteria.

Key actions
What you do

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Key actions
What you do

Reflect on classroom practices.

Teachers must reflect on classroom practices in order to innovate and improve their teaching work.

To this end, it is necessary to know and be able to apply basic educational research methodologies and techniques. This will allow him/her to design innovation projects identifying evaluation indicators.

It is essential that teachers understand and immerse themselves in the process of action - reflection - research, assuming that the exercise of the teaching function must be improved and adapted to scientific, pedagogical and social changes throughout life.

To know and apply information and communication technologies in the classroom.

Technologies are part of our daily life and should play an important role in the classroom, for which it is necessary for the teacher to know them and integrate them into the classroom in a natural way. The use of these technologies does not in itself guarantee learning, but they do serve as motivating and facilitating tools.

In turn, information and communication technologies are the object of learning, since it is necessary to train students in their proper and safe use.

In all this, the teacher must selectively discern the audiovisual information that contributes to learning, civic formation and cultural richness.

Assuming the educational dimension of the teaching role.

Teachers not only teach content, but also play an educational role, so they must be committed to the formation of their students as individuals. In this sense, it is important to ensure the development of an active, critical and responsible citizenship in the achievement of a sustainable future. To this end, it is essential to collaborate with the different sectors of the educational community and the social environment, as well as to relate education to the environment, analyzing and critically incorporating the most relevant issues of today's society that affect family and school education.

The teacher must also know and know how to exercise the functions of tutor and counselor in relation to family education in the 6-12 period.

Customers

Customers
Include who you help:

1. Students
2. Families
3. Educational Administration

Customers
Who you help

Students (boys and girls from 6 to 12 years old)
Children between 6 and 12 years old are the main beneficiaries of the work carried out by the teacher, since its essential objective is to favor their learning and development.

Families
The families of children between the ages of 6 and 12 receive the help and guidance of the teachers in order to face the learning and development process of their children in the most appropriate way. Teachers maintain close communication links to guide them, resolve doubts and difficulties and accompany them while working directly in the classroom with their children.

Educational Administration
Educational administration depends to a large extent on the work done by the teacher. In this way, the teacher becomes its main actor and the work done by the teacher contributes to the functioning of the educational administration as a whole. Coordination, innovation, responsibility, professionalism and commitment are essential for this.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. Development of key competencies in the students.
2. Accompaniment and guidance to families.
3. Improving education.

Value proposition
Benefits you offer

Development of key competencies in the students.
The teacher facilitates the learning of oral expression and comprehension, reading, writing, arithmetic, logical and mathematical skills, the acquisition of basic notions of culture, and the habit of coexistence as well as study and work, artistic sense, creativity and affectivity, in order to ensure a comprehensive training that contributes to the full development of their personality, and to prepare them to successfully complete Compulsory Secondary Education.

Accompaniment and guidance to families.
The teacher accompanies the families of their students, guiding them in the way in which they can contribute positively to the teaching-learning process.

They offer resources and tools for families to actively participate in the learning process, as well as show them the ways in which they can become an active part of the life of the school. Family-school collaboration is key for the good development of the teaching-learning process and it is the teacher who must ensure this.Structured routines

Improving education.
When teachers reflect on their practice, keep themselves updated and look for the best solutions to the diversity of situations they encounter in the classroom on a daily basis, they are contributing to improving education.

Channels

Channels Include:

1. Documents of the centre
2. Web pages of the centre
3. Open day
4. Interviews with families
5. Satisfaction and level of student learning
6. Satisfaction of families
7. Role of the centre and the teaching staff in the environment

Channels
How you deliver

School documents
The school's educational project, which defines its aims and principles, as well as those which refer to the way in which the school is organised and works, are key documents for publicising the school.

School website
The school's website is one of the main channels for publicising the school and the way it works. It provides access to teachers' personal websites or blogs showing the daily workings of the classrooms.

Open days
Open days, which are usually held close to enrolment periods, are an important channel for getting to know the centre, visiting its facilities and interacting with the teaching staff.

Interviews with families
Interviews with families are another of the most frequently used channels for dialogue with those in charge of the centre and with the teaching staff, in order to find out details of its day-to-day running.

Student satisfaction and level of student learning
The best way to assess the work done by a teacher and by a school as a whole is to look at the degree of student satisfaction and their level of learning.

Family satisfaction
The degree of satisfaction shown by families with the accompaniment and support received by the teacher and the educational centre throughout their child's learning process is another indicator of the work and functioning of the centre and the teacher.

Role of the school and the teaching staff in the environment
When a school and its teaching staff work for the benefit of the environment in which they are located, this is an indicator of commitment which is usually related to a positive assessment and is therefore attractive for the school itself.

Customer relationships

Customer relationships Include:

- Direct contact
- Meetings
- Marks
- Organisational documents
- E-mail and other online communications

Customer relationships
Roles/Relationships

Direct contact
There are different direct channels of communication between families, teachers and students. When leaving or entering the center, at the celebration of festivities, outings, etc. In addition, the teacher and the family can arrange tutorials in which to share and exchange information about tlearninghe students in order to contribute to their development and.

Direct contact can also take place through the participation of families in the School Council of the center, a body in which all members of the educational community are represented.

Meetings
Schools offer families and the rest of the educational community the possibility of meeting to face new projects and challenges. In this way, it is possible to call meetings to inform about the development of the new school year, to present the way in which a specific topic is going to be approached or to offer a space for reflection on a current issue. Meetings involving different members of the educational community from different sectors are always enriching.

Marks
At the end of each trimester, families are given the results of the evaluation of the different areas or fields. The evaluation in Primary Education is global, continuous and formative and takes into account the development of key competencies and the progress of the students in the learning process as a whole. This information allows families to know how students are developing their learning process.

Organisational documents
The Plan de Centro is a long-term planning instrument and is specified and developed in its constituent elements: Educational Project , Organisation and Operation Regulations, Management Project, Teaching Programmes and the Annual Report, which is the evaluation document. All these documents allow the educational community to be informed of all the activities and actions carried out in the centre.

E-mail and other online communications
Through e-mail or other channels established on the center's website or chosen educational applications, families are informed of all events and academic aspects related to their children.

Key Partners

Key Partners Include:

- University-Faculty
- Educational Administration
- Educational Institutions
- Colleagues

Key Partners
Who helps you

University-Faculty

The Faculties, as the bodies in which the Bachelor's degrees leading to the acquisition of the competences of Early Childhood Education teachers are taught, are one of the main support agents. They are where the studies leading to the necessary qualification to be able to exercise the teaching profession are developed, thus providing the necessary knowledge and skills for the professional future.

Educational administration

The educational administration accompanies teachers in their professional development and offers tools and resources for their evaluation, improvement and renewal, seeking their adaptation to the new realities demanded by society.

Educational centres

The educational centres in which teachers carry out their daily work become one of their main supports. Schools as communities and organisations provide teachers with a context in which to develop as professionals, putting at their disposal all the material and human resources at their disposal.

Colleagues

The colleagues with whom teachers meet throughout their professional career are essential. The teaching task requires teamwork and coordination, so that colleagues from the beginning of initial training and subsequent professional development are sources of learning and continuous help.

Revenue and benefits

Revenue and benefits Include:

- Vocation
- Interaction with the community
- Flexibility and creativity
- Salary
- Social recognition

Revenue
What you get

Vocation

The teaching vocation is a concept traditionally linked to the inner call that a person receives towards teaching. Answering this call through teaching is a source of satisfaction.

Interaction with the community

The interaction with the different members of the educational community, the exchange of ideas, opinions and the learning that this entails is another of the benefits of this profession.

Flexibility and creativity

Teaching work is characterised by flexibility and creativity. Teachers develop their creativity on a daily basis and require it in order to be able to respond to the professional challenges they face. At the same time, their work is flexible, allowing each teacher to work according to their own characteristics and beliefs.

Salary

Teachers have an average salary that provides stability and security. The salary you could earn between €2,000 and €2,500 per month.

Social recognition

The teaching profession enjoys good social recognition, as it is seen as a professional who influences the construction of the society of the future.

Costs

Costs Include:

- Availability
- Lifelong learning
- Stress
- Time pressure
- Pressure from the Education Administration
- Conflicts

Costs
What you give

Availability
The teacher is a professional who is always available to contribute to the development of his or her students, as well as to guide families. This availability can generate tensions and limit personal time.

Lifelong learning
Lifelong learning is a real need that teachers face in order to be able to respond to the continuous challenges of their day-to-day work in the classroom. It is therefore a requirement derived from their work which they must meet in order to guarantee the quality of their teaching.

Stress
Stress arising from the daily challenges and the bureaucratic burden is one of the main obstacles for teachers.

Time pressure
Teachers are under great pressure to fit their programmes into a given time frame. There is a large amount of content to be covered at this stage of education and a wide range of objectives to be pursued, all of which must fit into the strict rhythms of the school day.

Pressure from the Educational Administration
The educational administration often puts pressure on teachers to solve, act and improve in a short period of time. They are often required to carry out bureaucratic tasks related to the control and quality of teaching, which forces them to extend their working hours outside their workplaces.

Conflicts
Conflicts arise as a result of the continuous interactions in which teachers are involved with the rest of the educational community. Teachers face numerous conflicts with the various members of the educational community on an almost daily basis. Their own well-being and the working environment in which they work will depend on their ability to resolve them calmly and peacefully.

Golden Reads

	5 GOLDEN READS FOR PRIMARY EDUCATION TEACHER	LINK AMAZON
#1	Cremin, T., & Burnett, C. (2018). *Learning to Teach in the Primary School*. Routledge.	https://www.amazon.com/Learning-Teach-Primary-School/dp/1138211060
#2	Chaplain, R. (2016). *Teaching without disruption in the primary school: A practical approach to managing pupil behaviour.* Routledge.	https://www.amazon.com/Teaching-Without-Disruption-Primary-School/dp/1138884979
#3	Pollard, A., & Bourne, J. (1993). *Teaching and Learning in the Primary School.* Routledge.	https://www.amazon.com/Teaching-Learning-Primary-School-University/dp/0415102588
#4	Rogers, S., & Wyse, D. (2016). *A Guide to Early Years and Primary Teaching. A Guide to Early Years and Primary Teaching.* SAGE Publications Ltd.	https://www.amazon.com/Guide-Early-Years-Primary-Teaching/dp/1473906946
#5	Carden, C. (2018). *Primary Teaching: Learning and teaching in primary schools today.* Learning Matters.	https://www.amazon.com/Primary-Teaching-Learning-teaching-primary/dp/1526436442

Personal Business Model Canvas

Professional Social Educator

Author: Clio Dosi, Roberta Lozzi, Matteo Vignoli (Unibo)

Professional Social Educator | Personal Service Model

Who Helps You

The team of Professional Social Educators gives motivational support to the individual Educator

Public bodies such as hospitals, region, municipality, province and prisons

Private entities such as: family homes, therapeutic communities, nursing homes, rest homes, cooperatives, shelters, home care, schools and educational centres

What You Do

Helping people in difficulty, analysing the needs of the territory, designing services and interventions, carrying out care and social activities, evaluating educational intervention

Who You Are

The Professional Social Educator organises and manages educational and rehabilitation projects and services within health or socio-educational services for people in difficulty.

Benefits You Offer

Helping people in need

People helped by the Professional Social Educator can then become an integral part of society again

Helping their team members so that they can perform their tasks to the best of their ability

Roles/Relationships

The Professional Social Educator helps the client face-to-face, so that she can be closely monitored
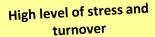
Who You Deliver

The role of the educator is developed in three macro service areas: Social Welfare Services, Health Services and Social-Educational Services

Who You Help

The socio-pedagogical educator helps unaccompanied minors, families, the elderly (self-sufficient and non-self-sufficient), the disabled, adults with psychiatric problems, migrants, drug addicts, prisoners.

The social and health educator helps: minors and elderly people in difficult circumstances, people with physical or cognitive disabilities, the treatment of addictions and social marginalization phenomena
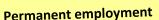
Costs and Consequences

High level of stress and turnover

Training with a degree or courses to be able to register for the register

Compensation and Rewards

Permanent employment

Through the chosen path, it is possible to assume prestigious positions

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Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities
Who you are

The Professional Social Educator organizes and manages educational and rehabilitative projects and services within health or socio-educational services for people with difficulties such as minors, drug addicts, alcoholics, prisoners, the disabled, psychiatric patients, and the elderly. She works in multidisciplinary teams and encourages groups and individuals to pursue the goal of social reintegration by defining educational, care, and health interventions that meet individual needs through the development of autonomy, individual potential, and social relationships with the external environment. There is a distinction between the SOCIO-SANITARIAN PROFESSIONAL EDUCATOR, who can work both within healthcare facilities and in cooperatives and communities, and the SOCIO-PEDAGOGICAL PROFESSIONAL EDUCATOR who works within the educational and social services of public and Third Sector organizations.

Skills, abilities
Who you are

Hard Skills
- Apply techniques of user needs analysis.
- Apply techniques of participative planning of interventions for the prevention of distress.
- Apply methods for the definition of the customized educational project
- Apply social and health counselling techniques.
- Apply techniques for the management of self-help groups.
- Apply techniques to support the job placement of people in difficulty.
- Apply management techniques of home interventions.
- Apply management techniques of mediation interventions in interpersonal relations (family, couple...) and individual assistance.
- Apply modalities of involvement of territorial actors: families, services, and sponsors.
- Apply Fund Raising techniques.

Specialist knowledge
- Elements of special pedagogy.
- Elements of andragogy.

- Elements of deviance pedagogy.
- Elements of budgeting and fundraising.
- Social and community psychology.
- Elements of psychopathology, neurology, and psychiatry.
- Methodologies of psychological and socio-medical counselling.
- Methodologies for evaluating interventions in the social-health area.
- Regulations for the operation of social-health structures.
- Territorial network of social services.

Soft Skills
- Apply project management techniques.
- Apply methodologies for defining communication plans.
- Apply techniques for coordinating work groups and managing group dynamics.
- Apply techniques for the definition of network agreements.
- Apply techniques for the evaluation of interventions in the health and social field.
- Apply research techniques (data/information/news).
- Apply research methods in the social and health field.
- Know how to work in a team.

Career path
Who you are

In addition, before becoming a social educator they must complete one of the following two educational courses.

- Degree in Educational Science which gives the qualification of socio-pedagogical professional educator working in educational and social services.
- Degree in Professional Education which falls within the health professions and works as a socio-healthcare professional educator in health care contexts. The latter falls within the health professions in the medical field and must be registered as a professional educator to work.

In the absence of appropriate qualification, one can participate in the Professional Social Educator course to complete the educator's training.

The Professional Social Educator usually works as a partner - with a permanent employment contract - in social cooperatives, but sometimes she can pursue a career as a self-employed person by opening a VAT number.

The working time, usually 36 hours per week, depends on the type of activity carried out by the users involved. In facilities where continuous presence must be guaranteed, working time is organized in shifts.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Responsabilities
The main activities and responsibilities of the Professional Social Educator are divided as follows:
1. Analysing the needs of the territory: through analysis of studies and comparisons with social actors.
2. Planning services and interventions: aimed at satisfying the identified needs.
3. Organising the assistance and rehabilitation interventions by planning the activities through discussions with the client.
4. Carrying out care and sociomedical activities aimed at different targets.
5. Reporting: producing the documentation requested by the client.
6. Evaluate the educational intervention: from the project to the service provided, according to the objectives set in the planning phase.
7. Activating territorial networks: acting as spokesperson for needs.

In particular, a Professional Social Educator is in charge of mapping the needs of the social fabric by analyzing data and sources to detect the territory's needs, mapping the territory's resources, promoting and coordinating research on local policies, designing educational and re-educational programs for people in difficulty, assessing available resources and creating a territorial network to set up projects, carrying out administrative procedures for the awarding of a contract, appointing and organizing the work team, carrying out educational and social reintegration interventions, assessing and reporting on the situation of family units, assisting persons in charge with a growth and reintegration pathway, assessing and reporting on the progress of interventions carried out and in progress, promoting and organizing assistance and voluntary groups.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers

Who you help

The Professional Social Educator helps: minors, drug addicts, alcoholics, prisoners, disabled, psychiatric patients and the elderly through educational and rehabilitation projects and services.
In particular:

- The **socio-educational professional educator** helps fragile subjects by supporting the person's growth towards autonomy and social reintegration. She, therefore, deals with the personal and social growth of subjects in situations of difficulty, discomfort and fragility of various kinds, at different stages of life: children and adolescents, adults, the elderly. For example, unaccompanied minors, families, the elderly (self-sufficient and non-self-sufficient), the disabled, adults with psychiatric problems, migrants, drug addicts, prisoners.

- The **social and health professional educator** has an area of intervention that involves different age groups and different areas (social and health), with particular reference to the support of minors and elderly people in difficult conditions, people with physical or cognitive disabilities, the treatment of addictions (including the so-called 'new addictions': Internet addiction, smartphone addiction or social media addiction) and social marginalisation phenomena. The educational paths therefore follow different purposes, depending on the specific context and the educational needs of the target group (e.g. rehabilitation, functional re-education, integration and social inclusion).

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

The **Professional Social Educator (PSE)** must be able to convey calmness to her patients and help them in their daily struggle against the evil that afflicts them, the kinds of which range from drug addiction to psychological problems.

In the responsibilities towards the user, the guiding principles for the PSE are manifold, but they can only start from more general concepts such as service and help, social justice, solidarity, education. Within this framework the PSE, in all his educational interventions, will start from the conviction that she is an agent of help for the person, her family, the community to which she belongs.

In tackling this task, the PSE should not have the role of problem-solver, taking the place of those concerned, but that of approaching people by accepting them, understanding them,

proposing and fostering those educational processes useful for change that will allow positive personal growth, the widest possible social inclusion, well-being and a quality of life to which all human beings have a right.

The person in need of educational intervention must be an active subject throughout the process, and must be taken care of as a whole.

It is important to remember that there are principles referring to the user's family, and the value for the PSE will be to recognize that the family is the user's first social group, and consequently the educational intervention will operate to maintain, support, and strengthen the biological or alternative family affective ties, where this is possible.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
   5. How will you follow-up to make sure Customers are happy?

Channels
How you deliver

Professional Social Educators can be found on various websites where the educator has to indicate part of her background. To search for a job as a professional educator there is Linkedin as for other jobs but also other websites.

Specifically, she can work in **3 macro-areas:**

- **Social welfare services**: territorial services, residential communities, sheltered centres, or day centres for mildly disabled people and minors at risk, care facilities for the elderly.

- **Health services**: services for drug addicts, alcoholics and psychiatric patients, severely and severely disabled people and psychiatric patients.

- **Socio-educational services**: territorial educational services, listening centres, mother-child communities, specific projects aimed at socially vulnerable categories (e.g. minors at risk, adults in difficulty). And in these places, the educator must transmit her values and carry out her activities in such a way that the end user understands what she needs and can be helped. The educator is therefore always very close to the end user to observe her changes and understand her needs.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

The Professional Social Educators' interactions with patients are face-to-face. In this way, they can effectively monitor their patients, their attitudes and their progress. Patients go to the educators' locations from which the educator then provides her service to the patient.

Afterwards, they may decide to interview the patients, or give her standardised questionnaires to understand their needs and to assess them.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

The Professional Social Educator carries out her activities basically in a team with other professional educators and in an integrated way with other professional figures involved in the service provided (doctors, nurses, social workers, social and health workers, psychologists, prison staff).

Central to her activity is the relational dimension with the target of the interventions and their families, as well as with the network of territorial services that includes institutions, associations, social voluntary groups, educational and training agencies, social and employment services, companies, experts, etc.

Helping her is the State with public funding and the public and private facilities where she works:
- Public, such as hospitals, prisons, provinces, regions or municipalities.
- Private residential and semi-residential, such as family homes, therapeutic communities, nursing homes, rest homes, cooperatives, shelters, home care, schools and educational centres.

Revenue and benefits

Revenue and benefits Include:
1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

The Professional Social Educator's salary depends on the type of contract:

- If hired as an employee, it provides a gross salary of about 1,500€ per month (full-time employment).
- If hired as a freelancer, the salary is usually 20 euros per hour, for a gross income of about 35,000/40,000€ per year.

After an induction period of a few months (which varies depending on the personnel policies of the organisations), the social educator is usually stabilised in employment by being hired on a permanent basis. Over time, through the acquisition of field experience and management skills, the professional educator can assume, in some organizational contexts (residential and semi-residential facilities, social cooperatives...), roles of responsibility and coordination.

On the job level, she may carry out planning activities in response to public tenders or be responsible for the training or mentoring of new educators and their support in the work team.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Very often Professional Social Educator are put to the test, also working in critical and high-stress contexts, so training, supervision but also passion and determination in their work are important.

The approach to work should be characterised by availability and flexibility and by high personal motivation. In this area of professionalism, because of the critical issues that can be encountered in relations with users, turnover can be high.

Golden Reads

	5 GOLDEN READS FOR PROFESSIONAL SOCIAL EDUCATOR	LINK AMAZON
#1	Van der Kolk, B. (2014). **The body keeps the score: Brain, mind, and body in the healing of trauma**. Penguin Books.	https://www.amazon.com/Body-Keeps-Score-Healing-Trauma/dp/0143127748
#2	Perry, B. D., & Szalavitz, M. (2017). **The boy who was raised as a dog.** Basic Books, Hachette Book Group.	https://www.amazon.com/Boy-Who-Raised-Psychiatrists-Notebook-What/dp/0465094457
#3	Westover, T. (2018). **Educated: A Memoir.** Random House.	https://www.amazon.com/Educated-Memoir-Tara-Westover/dp/0399590501
#4	Francois, A., & Quartz, K. H. (2021). **Preparing and sustaining social justice educators.** Harvard Education Press.	https://www.amazon.com/Preparing-Sustaining-Social-Justice-Educators/dp/1682536521
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Personal Business Model Canvas

Project Manager

Author: Joanna Świętoniowska (UITM)

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Project Manager | Personal Service Model

Who Helps You

- Subject matter experts
- Organizational units
- Supply chain partners
- PM community
- Project Stakeholders
- Steering Committee
- PMO manager

What You Do

- Project Initiation
- Project planning
- Project Execution & Monitoring
- Project closing

Who You Are

- Soft skills
- Leadership skills
- Adaptability & Ability to respond quickly
- Resilience
- Resistance to stress
- Problem Solving
- Conflict Management skills
- Organization skills
- Certificates
- Tools

Benefits You Offer

- Ensuring business value of the project
- Optimization of key project metrics
- Effective communication with the stakeholders
- Project's risk reduction
- Increasing the competitiveness of the organization

Roles/Relationships

- Team Leader
- Decision maker
- Negotiator & Conflict manager
- Mentor/Coach
- Support for Programme/Portfolio manager
- Gatekeeper to information
- Change Agents

Who You Deliver

- Face to face meetings
- Systems, software & platforms
- Online communication
- Project docs

Who You Help

- Project stakeholders
- Top management staff/Owners
- Customers & End-users
- Steering Committee
- Sponsors

Costs and Consequences

- Multitasking work
- Stress and working under time pressure
- Highly irregular and variable schedule
- Constant Availability
- Conflict prone environment

Compensation and Rewards

- New career opportunities
- Recognition & Respect
- Work in multidisciplinary team
- Development stimulating environment
- New Relationships
- Sense of accomplishment

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Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Roles & Skills
Who you are

Possible Styles

There are several styles of project management which should complement the business objectives and the way the team works. Each project is different, so the style should be adjusted to the specifics of the project (different methodologies may be required for e.g. IT project, construction project or EU project).

Waterfall project management (classic project management) is a linear system in which a project is divided into separate phases, and the phase cannot begin until the previous phase is completed. The process and responsibilities are clearly defined at the beginning; they are not expected to change over the course of the project.

Agile project management (eg. Scrum, Kanban, XP, SAFe, Nexus, LeSS) is an iterative system in which the larger goal is broken into smaller, more manageable elements. It focuses on completing work in short cycles called "sprints", project teams have daily brief meetings held to discuss task progress.

As the project is implemented in iterations, it allows for ongoing changes and modifications.

Lean project management is a philosophy that enables teams to deliver faster by managing their workflow efficiently and focuses on delivering value from the customers' perspective. The project manager must specify value for the customer and then must identify the project's value stream – the sum of all the actions necessary for the project to reach completion – and eliminate actions or processes that don't add value.

Six Sigma project management is the method that focuses on understanding customers' needs and eliminating defects and waste. These goals are achieved by applying knowledge of statistics, engineering and project management, as well as the underlying processes and systems. The project manager focuses on clearly defining and planning each of the four project constraints: scope, time, cost and quality.

Education
Who you are

Education & Experience

The entry requirements of a project manager are difficult to determine because different backgrounds can lead to this career, but there are some common education and training requirements to keep in mind. A degree in project management is not required to hold the position. Project managers generally need to have a bachelor's degree in business administration, management, finance, computer science or engineering, but managers with expertise in a specific area or long time experience may be able to get this job position without one. For certain types of projects, degrees in fields can be useful (such as architecture, construction, or an engineering degree for a construction project, information technology for IT projects). A master's degree in project management can be advantageous. In the project management profession, many skills are transferable from other industries and roles and will be recognized and valued by employers.

Education & Experience – opportunities:

- Project Management Degree (at the bachelor's and master's level): Project Management Major or Project Management Specialization;
- Degree in other fields: business, finance, engineering, and other industry, organizational leadership and management;
- Project Management postgraduate studies;
- Project Management trainings;
- Getting a credential like a professional certificate;
- Building up skills important for project manager in a workplace;
- Gaining some years of experience in project management in a workplace.

Skills, abilities
Who you are

Communication skills

Leading the project team and managing project results requires a communication skill, that is the essential skill project managers use in project management process. The most important communication skills for leading project teams are: active listening, written communication, verbal and non-verbal communication, public speaking, empathy, open-mindedness, leadership communication and feedback. Communication skills help project managers to influence project outcomes, express the project goals and expectations to team members clearly, manage the deadlines or resolve problems. As the projects respond to the needs and problems, a good understanding of the problems to be solved requires adequate communication with the people. Good communication skills can facilitate a workplace environment in which project team members can feel supported and comfortable asking question. During project planning and design as well as project implementation, effective communication with the stakeholders (management, customer, sponsor) is required.

Motivational skills

You as a project manager should have the ability to motivate project team members to do their best work even when deadlines get tight and projects get tricky. Motivation can inspire, encourage, and stimulate project team members to achieve accomplishments. Motivation can also create an environment that fosters teamwork and collective initiatives to reach common goals. Stimulating team member performance requires a project manager to harness many different skills, including good communication, the ability to train others, make decisions, lead by example, and create a positive, motivational environment by understanding and associating with the key components of motivation.

Negotiation skills

The project manager interface between stakeholders' expectations and the reality of what can be delivered by the team. He must negotiate prices, deadlines, and the scope of the project outcomes.

Skills, abilities
Who you are

Organization skills

Project manager must be highly organized. It helps him in managing expectations, focusing time, effort and resources on work that matters and delivering results in a timely manner as expected. The key organizational skills of project manager are as follows: goal setting skill (involves defining goals in accordance to stakeholders needs, breaking goals into smaller units and setting deadlines for them); prioritization skill (has an ability to evaluate tasks to know the level of importance and commitment they need); time management (has an ability to organize and plan the time spent on activities in project and adjusting schedule to accommodate that), self-organized (has an ability to manage time, energy and workspace well to accomplish assigned tasks successfully and be able to work on assignments without supervision), self-motivation (has an ability to motivate himself, to keep going even in the face of setbacks, to take up opportunities and show commitment to what he wants to achieve).

Leadership

One of the most important parts of a project manager's job is leading a team. As a leader, project manager empowers team to create the project vision, helps to understand the direction of the project and to understand the importance of their contribution. A well-developed decision-making skills, as a part of leadership, are useful as the multiple decisions are made by the PM in frame of the project on a daily basis. Managing a project and leading the team requires to stay focused on many different things at once. Project manager should be comfortable at delegating tasks to project team members with the necessary skills and experience. Delegation skill requires trust to people. Effective project leaders should be problem solvers. A project manager should be able to identify the root causes of a problem and analyze it, then evaluate possible solutions. A good project manager isn't just a team leader; he's also a part of the team. Therefore, he must represent an attitude of cooperation, collaboration, ease to work with and fairness to others.

Skills, abilities
Who you are

Conflict Management skill
Conflicts are integral to projects as they are often associated with complexity, unknowns, and changing requirements. Projects involve multiple coming together to manage and execute tasks. People assigned to a project join the team with varying opinions, expectations, values, and ways of working. Often, project teams consist of people who may not have worked together before. It is worth to underline, that project conflicts can arise between multiple stakeholders in a project throughout the life-cycle of a project. Project manager should has the ability to identify and understand the positive and negative values of conflict in project and manage its impact on team performance and project success.

Ability to work in a team
In most professions today, we work in teams. The same applies to the profession of a project manager, with the difference that he works as a team leader with people from inside (project team, management of the organization) and outside the company

(e.g. customers, suppliers, sponsors). A project manager is responsible for forming a team. He needs to consider that different individuals have different traits and preferences for specific work and roles.

Adaptability & ability to respond quickly
No matter how carefully planned project is, there will inevitably be things along the way that may not go as planned. An important ability of a project manager is to be flexible and agile. It is important to be able to deal with problems and make the necessary changes to move forward even in the face of unexpected problems.

Problem Solving
Much of the work of a project manager position involves rapid problem solving and proactively and accurately identifying where problems may arise. Skills in methodical and effective problem solving are critical to this role. Problems may be strictly technical in nature, such as performance, reliability, traffic. They may relate to the solution's compliance with applicable regulations.

Skills, abilities
Who you are

Resilience

Project managers should be able to work under pressure, and due to the uncertain and complex environment must be able to change course quickly with limited resources and often demanding stakeholders and customers. The project manager should be flexible and agile, changing his plan in response to adversity or when positive opportunities arise.

Personality traits

Beyond just having soft skills, there are personality traits that help the project manager in his daily work. You as a project manager should be proactive enough - take the initiative and ask questions instead of waiting for answers; be determined to move forward; be energetic and committed to project activities and overall goals. The project manager need also be a visionary, should be able to understand the bigger picture, envision success and inspire a shared vision. An effective PM is characterized by strategic thinking (combining intuition, wisdom and experience), necessary to come up with the right solutions to the problems.

Contextual competences

This group covers the project management competence in managing relations with the organisations and the ability to function in a project focused organization. The IPMA Competence Baseline (ICB) describes following contextual competence elements: project programme & portfolio orientation; project programme & portfolio implementation; permanent organisation; business systems; products & technology; personnel management; health, security, safety & environment; finance; legal.

Technical competences

This group covers the project management technical content, sometimes referred to as the solid elements: project management success; interested parties; project requirements & objectives; risk & opportunity; quality; project organisation; teamwork; problem resolution; project structures; scope & deliverables; time & project phases; resources; cost & finance; procurement & contract; changes; control & reports; information & documentation; communication; start-up; close-out.

Certificates
Who you are

Certificates

Various organizations offer several certifications for project managers at different stages levels in their careers. The following describes the basic certifications that a person with little or no experience can apply for.

Waterfall project management:

The Project Management Institute (PMI) offer a complete range of certifications link. The most popular ones are described below:

Certified Associate in Project Management (CAPM) is an entry-level certification designed to prepare candidates for positions in project management. Is geared toward people who hope to manage projects, take on more responsibility, or add project management skills to their resumes. It is for professionals without a college degree, or with only rudimentary project management experience – Link.

Project Management Professional (PMP) is one of the most popular and well-recognized certificates in this field. PMP is a certification for project managers with at least three years of experience – Link. The PMP is more in-demand than the CAPM. The CAPM was mentioned in 1,943 US job listings on Indeed in July 2022, while the PMP was mentioned in 42,240.

PRINCE2 Foundation/PRINCE2 Practitioner - Projects in Controlled Environments (PRINCE2) is well-known in the UK and its government entities. The PRINCE2 certifications are delivered by Axelos and focus on directing, managing, and delivering projects across all phases, pre-project, initiation, delivery, and final delivery. The PRINCE2 Foundation certification is an entry-level credential that tests basic project management terminology and methodology, whereas the Practitioner certification tests advanced project managers who have already achieved PRINCE2 Foundation – Link.

Certificates
Who you are

IPMA® (International Project Management Association) was founded in 1965 and is the world's first professional project management association. Within the IPMA® competency-based Four-Level Certification System for project managers there are four types of certificates:

IPMA Level D: Certified Project Management Associate certification is designed for people looking to progress in their project management career – link

IPMA Level C: Certified Project Manager certification is designed for relatively experienced project professionals who can demonstrate an ability to manage moderately complex projects - link

Level B and Level A are dedicated for Senior Project / Programme / Portfolio Managers (level B) as well as for Project / Programme / Portfolio Directors (level A).

Certificates
Who you are

Agile project management

Certified ScrumMaster (CSM) from Scrum Alliance is for project managers getting started as Scrum practitioners. The Scrum Alliance, which offers this credential, is a nonprofit organization that encourages the adoption of Scrum and agile practices, promotes user groups and learning events, and provides resources for professional development. Experience is not required, only general familiarity with Scrum and completion of two-day CSM training course – Link. Certificates similar in scope: Professional Scrum Master (PSM) and Professional Scrum Product Owner (PSPO).

Agile Certified Practitioner (ACP) certification from PMI is designed to validate knowledge of agile principles and skills with agile techniques (covers topics such as including Scrum, Kanban, Lean, etc.). It's for those who work on agile teams or in agile organizations (experience is required: 12 months of general project experience within the last 5 years and 8 months of agile project experience) – Link.

PRINCE2 Agile Foundation / Agile Practitioner are certifications offered by Axelos, designed for those working in agile environments and validate your knowledge of PRINCE2 governance requirements, agile concepts, and techniques. The Foundation certification covers the fundamentals of the PRINCE2 method and covers governance requirements and agile concepts such as Scrum, Kanban, Lean Start-up, and Cynefin. The PRINCE2 Agile Practitioner certification is the second step, after passing the Foundation certification – Link.

AgilePM Foundation/Practicioner are certifications in Agile Project Management offered by APMG International. Certification is based around eight principles and combines flexibility with sufficient forward planning, and collaboration to ensure goals are well understood by all stakeholders and addresses the needs of those working in a project-focused environment who want to be Agile - Link.

Tools
Who you are

Tools

Project management software and tools can help project manager and his teams to plan, coordinate, and execute various aspects of project. There is a wide range of project management software - from simple to-do lists to complex all-in-one software.

The key benefits for project manager of using software are as follows: enhance productivity, help in task management, allow for real-time goal setting and progress tracking, provide better collaboration and communication and more accurate resource management.

Project manager can use also various tools that support the particular project management area such as work scheduling, team management, resources planning and management, tracking the project progress, communication management, meetings management, procurement management, project evaluation etc.

Project manager can simply use MS Office Software (MS Excel, MS Word, MS PowerPoint), Microsoft 365 (Teams, OneDrive, etc.) or Google Shared Documents or apply more sophisticated tools such as:

- MS Project - link

- Monday.com - link

- Jira Software - link

- Open Project – link

- Asana – link

- Confluence - link

Project management software can serve also as a knowledge repository (e.g. Trello – link).

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

What does a project manager do?

Project manager activities vary from industry to industry, but the general, basic duties of a project manager remain the same. He shares responsibilities across project life cycle: Initiating, Planning, Executing, Monitoring and Controlling and Closing. They all are described in detail in project management standards such as Project Management Body of Knowledge (PMI).

Project initiation

Project initiation is the first phase of a project where the project team is assembled, the project objectives are defined, and the project's feasibility is assessed. During the project initiation phase, the project manager works to identify the project's goals and objectives, stakeholders, potential risks and constraints, and the project's scope. He also develop a high-level plan for the project.

An important part of his job is to create a business case - document that explains how the project's goals align with the company's long-term plans.

The project identification consists of the following activities:

- Define the project's purpose, objectives, and scope.
- Identify stakeholders and determine their needs and expectations.
- Assess the feasibility and viability of the project.
- Develop a high-level project plan which includes the project timeline, budget, and resource requirements
- Establish project governance and communication protocols.
- Secure funding and resources for the project.
- Conduct a risk assessment and develop risk mitigation strategies.

Key actions
What you do

Project planning

As a project manager, you will be responsible for preparing the project plan. This means that you have to establish the project plan that defines the total scope of the project and project goals, and describe the path to successfully complete the project and achieve the goals. The final result of these tasks is developed Project Management Plan and Project Documentation that will be used to carry out the project. The Project Management Plan and Project Documentation consider all aspects of the scope, time, cost, quality, communications, human resources, risks, procurements, and stakeholder engagement.

The project planning consists of the following activities:

- Collect requirements and define project scope;
- Define key performance indicators (KPIs);
- Prepare work break-down structure (WBS);
- Define activities and develop project schedule;
- Assess what resources will be needed and prepare procurement document;
- Estimate costs and determine project budget;
- Develop the Project Management Plan and final Project Documentation;
- Identify risks and perform risk analysis;
- Prepare Quality Management Plan, Human Resource Management Plan, Communications Management Plan, Risk Management Plan, Risk Responses Plan, Procurement Management Plan, Stakeholder Management Plan.

Key actions
What you do

Project Execution & Monitoring

A project manager is responsible for completing the work defined in the project plan to satisfy the project specifications and stakeholders needs. The project execution will ensure that project team will get the right deliverables, benefits, and values. It involves:

- building and coordinating project team members and resources,
- managing stakeholder expectations,
- managing communication,
- directing and performing the activities of the project in accordance with the project plan,
- performing quality assurance,
- conducting procurements.

An important task during project implementation is monitoring the progress of the project in a few main areas: time, budget, quality, and risk. Part of this process is anticipating any potential issues or problems before they happen and then plan and introduce changes in project documentation. Adaptability and problem solving are key attitudes to keep control of a project. The project manager should report on ongoing basis the project progress to explain the stakeholders the current status of the project, describe the planned/introduced changes and expected improvements.

Key actions
What you do

Closing the project

Once the project outcomes have been developed, you will have to formally complete the project: obtain the acceptance by the customer or sponsor to formally close the project, conduct post-project review. You will need to collect and archive project documentation, document of all lessons learned and close out all procurement activities ensuring termination of all relevant agreements. You as a team leader will have to also perform team members' assessments and at the end of the project release project resources.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (project leaders, team members)
5. Your organization customers, business partners, communities

Customers

Who you help

Project stakeholders

A stakeholder is a person, group or organization that actively participates in a project, which is affected by the processes taking place in the project or the result of the project, or which can affect the process or its result. Stakeholders can stay inside or outside the project team and the project organization. Stakeholders benefit from a delivered solution that addresses the business need and allows for return on investment. Stakeholders care about the highest business value of the created project outcomes.

Top management staff/Owners

This is top management that is acting on behalf of the company's owners, which formulates the main strategic goals and design and accept initiatives undertaken by the organization, taking into account an analysis of its resources and an assessment of the internal and external environment in which the organization competes.

Top management defines and validates the business case, the objectives and the priority of the project in view of the organization or client needs. They benefit form project management work expecting increased organization's performance and overall profitability.

Sponsors

A project sponsor is a person (often a manager or executive, could be also external body like bank, European Union institution) with overall accountability for the project, who provides resources and support for the project in order to enable its success. A project sponsor is typically responsible for initiating, ensuring, approving, and establishing a series of key aspects in relation to the project, which can be summed up under categories of vision, governance, and value/benefits realization.

Customers
Who you help

Customers/End-users

The project customer/end-user is the person (group) who will be using the product or service on a regular basis. The needs and wishes of the users must be incorporated into the project design. Cooperation with end-users increases the probability of project success that is determined by the end user's ability to use the final product or service. Users provide valuable information and can make a project more or less useful.

Steering Committee

A Steering Committee is an advisory body that influences how a project is managed. Its members include experts, government representatives and senior managers in the project or organization. Key issues of interest are timeliness, budget, scope and methods used. A Steering Committee set the strategic direction of projects and make the right decisions with the right data (provided by project manager).

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

Ensuring business value of the project

The project manager through the effective use of tools and techniques as well as project management processes helps organization to meet its strategic objectives and obtain greater business value from investment. It covers the monetary and non-monetary value of an organization. The business value that should be created by the project is defined by the organization's top management or project management office, but project manager is responsible for delivering the identified business value. As the project is "undertaken to create a unique product, service, or result that provides unique value for the customer" (PMI, 2013), new value for the stakeholders will come either from the products or services that will be a new offering or from modified versions of existing products or services. In order to ensure that the project will deliver business value, the project manager should understand the project vision, communicate the vision

and business value to the team, effectively deliver value as well as measure the realization of business value.

Optimization of key project metrics

Project management metrics play an important role in the success of any project. Project manager help the organization design key project metrics to align with its strategic goals. Using the project metrics, the project manager ensures that the project is progressing as planned and helps organization to avoid future bottlenecks. It can help control costs, time, improve quality in project as well as assess team productivity and quality of work to finally achieve the project outcomes as useful as possible. Tracking and optimizing of key project metrics increases the chances of success. It helps stakeholders to make informed decisions as well as to adapt and forecast better during uncertainties.

Value proposition
Benefits you offer

Effective communication with the stakeholders
Project managers spend about 90% of their time communicating with stakeholders. PM allows the company to ensure that there is common understanding who gets what information in frame of the project. Is also responsible for determining the best channel and form of communication for the audience. Project manager gathers information and disseminates it with the relevant people involved in the project. He also shield project team from irrelevant information that could cause confusion or even disturb the work. Effective communication ensures that team members are aligned on project goals and understand what's expected of them. It helps to ensure success at each stage of project implementation and to achieve desired outcomes. By communicating with external stakeholders, PM reassures them of the project what result in high stakeholders' satisfaction.

Project's Risk reduction
Project manager actively manage and control the project risk.

It helps to ensure a more successful project and helps to minimize losses of the organization. PM helps the company to be prepared to deal with the risk and to be more proactive and anticipate likely problems. This information can be transformed into valuable insights which can lead to better decisions of the top management. Risk management helps the organization determine which risks are more urgent and then handle those first. Materialized risks can affect the project budget and schedule, which in turn can affect how quickly the business values can be achieved - if they are achieved.

Increasing the competitiveness of the organization
Using the project management mindset, project manager allows the company to improve an organization's competitiveness. Increasing an organization's competitiveness is done by being able to complete projects faster, cheaper and more efficiently, which is made possible by the everyday activities of a project manager.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
    1. How will potential Customers discover how you can help them?
    2. How will they decide whether to buy your service?
    3. How will they buy it?
    4. How will you deliver what Customers buy?
    5. How will you follow up to make sure Customers are happy?

Channels

How you deliver

Face to face meetings

The most effective form of communication that PM uses is face-to-face meetings (kickoff meetings, project status meetings, project review meetings). Meetings involve communicating with participants and stakeholders, discussing issues and problems, analyzing project progress. They generate decisions that contribute to more effective implementation, regarding the goals to be achieved and the expected results and should be concluded with a minutes of the meeting sent to team members.

Systems, software & platforms

A project relies on information that is disseminated to various stakeholders, mainly team members, during the project life cycle. Project managers use various systems, software and platforms to store, organize and control project data as well as to collaborate with various stakeholders. With the help of these tools, project managers can easily share project information without the need to deliver the real data to the stakeholders (e.g. the online repository of data and documentation).
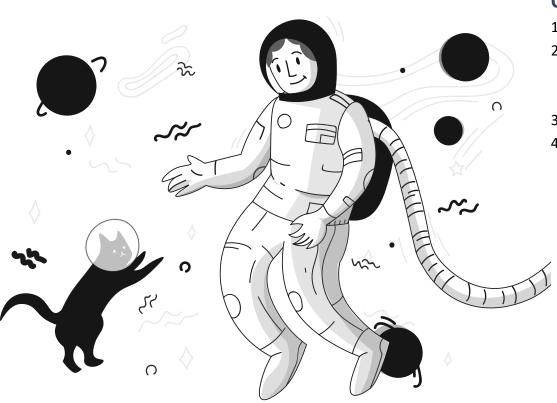
Online communication

Project manager can communicate the results of his work via e-mail, online messengers or through a software platform supporting online meetings. If the stakeholders are geographically dispersed, face-to-face communication can take place via videoconferencing (appear.in, skype). Online tools allow to instantly communicate relevant information to team members and stakeholders, and provide a space within which everybody can perform daily tasks and track the project progress.

Project docs

Project documentation is a collection of official documents containing important information about a project. PM documents project requirements, objectives, deliverables, risks, schedule and budget, and lessons learned used by the project team to achieve project goals. There are a many different types of project documentation: project plans, proposals, status reports, project team meeting minutes and others. A documentation process allows for the effective delivery of planned business value.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" - written communication (e.g. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

Team Leader

The role of the leader is related to activities such as managing resources, helping to solve problems, communicating with each team member, motivating to complete tasks, and checking the performance to ensure that the project is executed on schedule. The project manager as a team leader sets the direction for the team and motivate the team to meet the project goals in a way that meets or exceeds expectations.

Decision maker

Managing a project involves taking a number of critical decisions that can have a crucial impact on the success or failure of the project. Typically, the project manager is expected to make routine decisions (which affect the day-to-day implementation of the project), but sometimes the Steering Committee may delegate responsibility for making strategic decisions. Once the decision has been implemented, the project manager should monitor and evaluate whether the decision has produced the expected benefits.

Negotiator & Conflict manager

The project manager, while doing his job, plays the role of negotiator and the stakeholders are the people with whom project he manages negotiate. The PM is a conflict manager due human resources involved in executing project tasks. Often the primary goal of a day-to-day negotiations is to resolve some conflict to ensure that success is achieved with minimal risk to project objectives. He is also involved in negotiations with suppliers of goods and tools necessary for the project or he is involved in negotiating with stakeholders regarding support for the project.

Mentor/Coach

Project manager is responsible for the team members and can serve for them as a mentor. He can serve also as a mentor for junior project managers employed in organization. He can help them identify and develop strengths, and identify specific skill areas for improvement. PM can recommend conferences, workshops, books, to help the team members personal growth.

Customer relationships
Roles/Relationships

Support for Program/portfolios manager

Programs and portfolios are made up of coordinated projects designed to create a benefit to an organization. The support of project manager help ensure that the projects support the goals of organizational programs and portfolios. Based on the information that project manager provide to them, program managers assess the performance and benefits of the program to the company's overall goals against the organization's investment.

Gatekeeper to information

Project manager act as a gatekeeper to information what is mean that he has the authority to receive information and decide whether information will be passed on, filter information, restrict the content of information or block the flow of information.

Change Agent

Project managers are someone that brings change. All projects are initiated to create change - to create a new product, service or result. A project realizes its intended value when the change satisfies a stakeholder need. A well-managed can encourage people to become more involved and take ownership of the change process, work together towards a common goal and achieve the desired business results. The project manager strengthens and facilitates the change process in the organization and creates added value and better results for the organization initiating the change.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - ADVICE,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

Steering Committee

The Steering Committee role is to oversee and support a project. Project manager can be supported in the following areas: the Steering Committee provides advice and executive support, helps solve problems, helps set project direction, helps identify the right staff and subject matter experts to work on projects, guides the project team in accomplishing milestones according to the project plan, resolves conflicts, fosters positive and timely communication about project progress to senior leadership, investors, and other relevant stakeholders.

Project Stakeholders

Business stakeholders (e.g. top management, end-users, sponsors) are a very important element of partnership. These people are the source of business requirements and feedback provided during reviews. Creating a solution with a high level of business value requires constant interaction with this group.

Organizational units

The organizational structure decides the resources, communication methods and other aspects of project management. In many organizations, the project is carried out by members of organizational (functional) units. Team members perform project work that goes beyond their duties in relation to the normal work of the unit. A project manager 's partners are also a representatives of supportive units, such as the Human Resources, Finance, Marketing, Sales, IT etc.

Project Management Office manager

In project-mature organizations, the project manager is supported by the PMO manager in field of project management tools, methods and techniques as well as project standards that are implemented within the organization (which can be directly applied by the project manager). The support also applies to the area of training of project team members (which is the PMO manager's responsibility).

Key Partners
Who helps you

Subject matter experts

Subject matter experts have in-depth knowledge of the industry in which they work, they know what the best practices are and what technologies can be applied. This group of partners is an invaluable source of information and experience in the project area. The project manager should understand the processes involved in the project in order to be able to select the best team and solutions, but does not necessarily have the necessary subject matter knowledge. Subject matter experts can support project manager in the day-to-day implementation of project activities being external experts or members of the project team.

Supply chain partners

Are those stakeholders that form the network of activities, resources, and technologies involved in the creation of a project outcomes. Supply chain partners provide resources and implement support processes that are used in the project management (procurement, logistics, etc.) to create value.

Suppliers affect the successful accomplishment of a project through providing goods/services.

PM community

The project management community provides online resources and serves as a platform for the exchange of experience, knowledge and training materials to develop professional skills at various levels of advancement and in various areas of knowledge. Professional blogs run by project management practitioners and conferences organized by the project management community are also valuable sources of information. An important source of information for project managers are the websites and events organized by a leading professional membership associations for the project management profession. One of the best-known association is PMI (https://www.pmi.org/) or IPMA (www.ipma.world). This organizations provide tools, network, and best practices to those who seek help to successfully manage projects.

Revenue and benefits

Revenue and Benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

New career opportunities

By doing his jobs well, an aspiring project manager might build experience and then go on to become senior project manager (who executes projects with larger scopes), director/manager of Project Management Office (who helps guide the project management standards and practice in organization), Program or Portfolio Manager (who coordinate activities between multiple projects without directly managing them) or executive in different fields such as investments or innovations. Since the project manager should understand the project management processes to be able to complete the project, and does not necessarily have the necessary subject matter expertise, he can switch between industries.

New Relationships

Every day project manager has the opportunity to meet new people, be they carriers or customers. In case of international project, project manager can work with stakeholders from all over Europe, which gives the opportunity for new relationships and self-development. Project management field is for people who are predisposed to work with people and teamwork. Frequent interactions with people involved in the project are treated as the added value of working in this position.

Sense of accomplishment

Project manager is committed to "satisfy" the stakeholders needs and complete the project overcoming the problems. It includes organizing and carrying out a project from beginning to end. When project manager overcome the challenges and achieve the desired outcome, it gives him a great sense of satisfaction and personal achievement.

Revenue
What you get

Development stimulating environment

The complexity of projects naturally requires continuous development. Project manager's tasks and everyday job routine is rather complex then simple. In order to have the credibility to manage the teams and to execute demanding tasks, a project manager must have a wide range of competencies and skills in the field of management, innovation, communication, etc. The development of project management field requires continuous development in terms of new tools, techniques, industry innovations as well as soft skills. Therefore, project manager should constantly develop skills as well as interdisciplinary knowledge.

Recognition & Respect

Due to the huge role of project management in today's business, project manager plays a key role in building the organization's success by directly influencing the effectiveness of business processes implemented by the company.

Because it is so important to an organization's market success, the position of project manager is often considered crucial.

Work in multidisciplinary team

This career path can be a satisfying one for those who enjoy working with people. The goal of the project is to deliver stakeholder value, so multidisciplinary teams consisting of professionals with different skills and experience are formed in frame of the project. Working in such a team encourages you to rethink and restructure your processes and the methods or tools you use, which can lead to innovations and improvements. The biggest advantage, however, is the opportunity for continuous learning and exchange of experience.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Stress and working under time pressure

The project manager in his daily work feels anxiety, fear, frustration, which are associated with the characteristics of projects such as: the implementation of tasks in a limited time, with a limited budget, which by their nature are risky. Stress is caused by constantly being under pressure to carry out activities within tight schedules and budgets, and the need to deal with problems related to the project's resources (e.g. limited resources). The daily work of a manager involves the execution of multiple tasks at the same time, so stress also causes the inability to fully concentrate on one of the aspects and the need to constantly switch between them. Another source of stress is responsibility for the business success of the organization. The PM is the person responsible for the results of the project and for the efficiency of his team, and often must make unpopular decisions for the good of the project. Another stress factor is the need to deal with stakeholders with different personalities, sometimes with unrealistic expectations.

Conflict prone environment

People make up the project team and projects are executed by people. Differences of opinion on goals and procedures, missed deadlines, budget overruns and interpersonal problems can escalate to conflicts. Conflicts in project management can arise from the team (different personalities, priorities and interest of team members, role conflicts, communication problems, geographic dispersal of team members etc.); from the project priorities (different stakeholders expectations, conflicts between schedule and resources, etc.) and from cultural differences (especially in projects that are executed across borders involving many nations and cultures).

Costs
What you give

Constant Availability
Project manager must be continuously available. This is due to potential emergencies that cannot be planned in project. Meetings in which the project manager must participate are planned and organized taking into account the time priorities of the stakeholders. There are also frequent situations in which unplanned communication with the team occurs, when stakeholders submit requests for changes or have doubts as to the business value or priorities of the outcome being created. These types of problems need to be resolved quickly because otherwise the deadlines are at risk.

Highly irregular and variable schedule
Project managers typically work in an office environment. Some project managers, such as those in the construction industry, may travel to various work sites in the field. The challenge with regard to working hours in project management is that project manager don't have a fixed and predictable schedule like in other professions.

Working hours are irregular and variable because they are determined mainly by events happening in the project at given time. On some days, the project manager is forced to work longer because only then, for example, a particular task must be completed due to the availability of resources, or simply because that's the only time a particular stakeholder is available.

Multitasking work
In order to be effective in their work, project managers need perform many different tasks, driving the project to completion. This can lead people to believe that project manager have to be multitask in order to be productive. Multitasking can be disruptive in many ways. It can decrease creativity, incurs loss of focus and switching costs, and delays work. Not all tasks are created equal, so the project manager's job is to balance the priorities of urgency over importance and impact.

Golden Reads

	5 GOLDEN READS FOR PROJECT MANAGER	LINK AMAZON
#1	Project Management Institute. (2021). *A Guide to the Project Management Body of Knowledge (PMBOK® Guide) and The Standard for Project Management*. Project Management Institute.	https://www.amazon.com/Guide-Project-Management-Knowledge-PMBOK%C2%AE/dp/1628256648
#2	Kogon, K., Blakemore, S., & Wood, J. (2015). *Project Management for the Unofficial Project Manager.* BenBella Books.	https://www.amazon.com/Project-Management-Unofficial-Manager-FranklinCovey/dp/194163110X
#3	Nieto-Rodriguez, A. (2021). *Harvard Business Review Project Management Handbook: How to Launch, Lead, and Sponsor Successful Projects.* Harvard Business Review Press.	https://www.amazon.com/Harvard-Business-Project-Management-Handbook/dp/1647821258
#4	Horine, G. M. (2022). *Project Management Absolute Beginner's Guide.* Que Publishing.	https://www.amazon.com/Project-Management-Absolute-Beginners-Guide/dp/013764695X
#5	Verzuh, E. (2021). *The Fast Forward MBA in Project Management: The Comprehensive, Easy-to-Read Handbook for Beginners and Pros*. John Wiley & Sons.	https://www.amazon.com/Fast-Forward-Project-Management-Comprehensive/dp/1119700760

Personal Business Model Canvas

Secondary Education Teacher

Author: Soledad Domene, Juan A. Morales, María Puig,
Margarita Rodríguez (US)

Secondary Education Teacher | Personal Service Model

Who Helps You

University-Faculty

Educational administration

Schools

Coworkers

What You Do

His work consists of planning, implementing, evaluating and managing the teaching-learning processes for students from 12 to 19 years of age in public and private educational centers.

Who You Are

Hard skills (Critical Thinking, Patience, Communication) Soft skills (Organization, Creativity, Teamworks)

Benefits You Offer

Generate interpersonal bonds

Continuous learning

Living from your vocation

Roles/Relationships

Teaching staff
Student body
Schools
Management Team

Who You Deliver

Curriculum designs
Plans and programs
Direct contact
Meetings
Ratings
Organizational documents
Virtual Platforms

Who You Help

Adolescents from 12 to 18 years old

Educacional Administration

Families

Costs and Consequences

Availability
Lifelong learning
Pedagogical update

Stress
Time pressure
Pressure from the Educational Administration
Conflicts

Compensation and Rewards

Vocation
Interaction with the educational community
Flexibility and Creativity

Salary
Social recognition
Leadership

Personal Key Resources

Personal Key Resources include who you are:

Hard skills
Critical thinking
Patience
Communication
Organization
Imaginative thinking/creativity
Leadership
Teamwork

Skills, abilities
Who you are

The secondary school teacher teaches students from 12 to 19 years old in public and private educational centers.

Hard skills

Basic training related to educational processes and learning (12-18 years); learning difficulties and developmental disorders; society, family and school; adolescence, health and nutrition; organisation of the school space; teaching materials and skills; systematic observation and analysis of contexts and secondary school.Didactic-disciplinary training. Knowledge of the curricular content of the subjects related to the corresponding teaching specialisation, as well as the body of didactic knowledge about the respective teaching and learning processes.Practicum, school internships and Master's thesis.

Critical Thinking

Critical thinking is the ability to analyse the information we receive. It requires the training of skills such as analysis, reasoning, reflection or making judgements that can be learned in the classroom. Searching for, obtaining, processing and communicating information (oral, printed, audiovisual, digital or multimedia), transforming it into knowledge and applying it in the teaching and learning processes in the subjects of the specialisation studied. Encourage a critical, reflective and entrepreneurial spirit.

Patience

Patience is a virtue that every teacher must have, which is why it is said that the teaching profession is a vocation. It is the ability to put up with all the difficulties that arise on a daily basis. As well as tolerating certain behaviours, it means putting on a good face, trying to look for the positive side in order to move forward. Teachers have to be patient in order to deal with diversity and this is both beautiful and challenging at the same time.

Communication

Knowing the processes of interaction and communication in the classroom, mastering the social skills and abilities necessary to promote learning and coexistence in the classroom, and dealing with discipline and conflict resolution problems.
Inform and advise families about the teaching and learning process and about the personal, academic and professional orientation of their children.

Skills, abilities
Who you are

Organization

The teacher must promote the most efficient and productive organisation to support the teaching methodology necessary for learning. The organisation of the teaching work is a key dimension for a good functioning of the centre and classroom in secondary education, taking into account the regulations given by the Education Administration. Design and develop learning spaces with special attention to equity, emotional education and education in values, equal rights and opportunities between men and women, citizenship training and respect for human rights that facilitate life in society, decision-making and the construction of a sustainable future.

Creativity

Creativity is the ability to produce original responses to a problem. It is an ability that is in everyone and can be developed. It is the ability to discover new alternatives, to use one's imagination. The importance of creativity in secondary education lies not only in providing different solutions to conflicts, but also in the fact that it can be more adaptable to new situations.
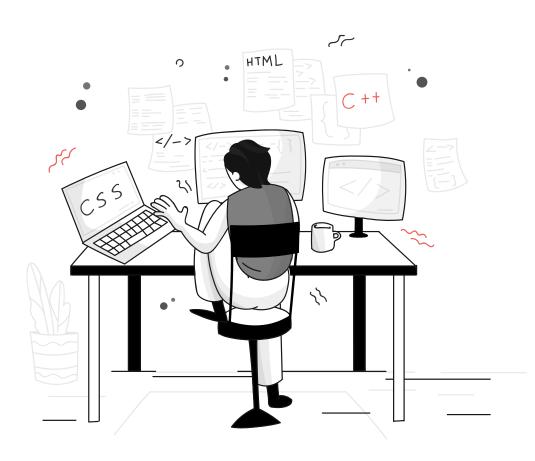
Teamwork

Teachers and students learn to solve problems together, developing leadership, communication, trust, decision-making and conflict resolution skills. Teaching teams should evaluate which actions have been useful and which have not in order to improve the teaching-learning processes. Working as a team increases personal motivation and results in greater and more effective learning. Moreover, these results are usually obtained in less time and with less effort.

Promote collaboration with other professionals in the educational field and, in particular, with school management teams.

Personal Key Activities

Personal Key Activities include what you do:

- Promote up-to-date pedagogical and didactic training.
- Design, develop and evaluate didactic programmes.
- Identify the abilities, interests and special needs of adolescents.
- Promote good coexistence in the classroom.
- Communication with families

Key actions
What you do

Promote up-to-date pedagogical and didactic training.

Know the curricular contents of the subjects related to the corresponding teaching specialisation, as well as the body of didactic knowledge regarding the respective teaching and learning processes. Plan, develop and evaluate the teaching and learning process, promoting educational processes that facilitate the acquisition of the competences of the respective teaching.

Identify learning difficulties and adjust to adolescents' abilities, interests and special needs.

The teacher should identify learning difficulties, cognitive and attention-related dysfunctions. In addition, the teacher should inform other specialist professionals in order to address the collaboration of the centre and the teacher in the attention to the special educational needs that arise. At the same time, they must acquire resources to favour the educational integration of students with difficulties and respond to them on a day-to-day basis in the classroom.

Key actions
What you do

Create and maintain communication links with the families.

Creating and maintaining communication links with families in order to have an effective impact on the educational process is a key part of a teacher's day-to-day work. In this way, they must know and know how to exercise the functions of tutor and counsellor in relation to family education, as well as promote and collaborate in actions inside and outside the school, organised by families, town councils and other institutions with an impact on citizenship education. Teachers must analyse and critically incorporate the most relevant issues in today's society that affect family and school education: social and educational impact of audiovisual languages and screens; changes in gender relations, multiculturalism and interculturalism; discrimination and social inclusion and sustainable development.
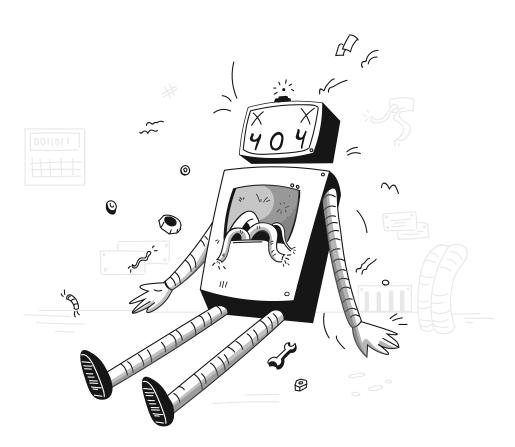
Promote good coexistence in the classroom.

Teachers should motivate their students with different strategies to create an appropriate classroom environment. Methodological strategies that promote universal values and good coexistence can be used.

Encourage and guarantee respect for human rights and the principles of universal accessibility, equality, non-discrimination, democratic values and the culture of peace.

Customers

Customers
Include who you help:

1. Adolescents from 12 to 19 years old
2. Families
3. Educational Administration

Customers

Who you help

Pupils (students aged 12 to 19 years)

During this period, physiological, intellectual, psychological and social growth takes place. Adolescence is the final path for the development of the identity that prepares us for adulthood. It is during this stage that the basic skills are acquired for the development of their educational and professional career.

Families

Families receive help and guidance from the teacher in order to deal in the most appropriate way with the learning and development process of their children. Teachers maintain close communication links to guide them, resolve doubts and difficulties and accompany them at the same time as they work directly in the classroom with their children.

Educational administration

Educational administration depends to a large extent on the work done by the teacher. In this way, the teacher becomes its main actor and the work done by the teacher contributes to the functioning of the educational administration as a whole. Coordination, innovation, responsibility, professionalism and commitment are essential for this.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. Generating interpersonal links
2. Continuous learning

Value proposition
Benefits you offer

Generating interpersonal links

Enjoying interaction with other people. Teachers interact with their students, colleagues and other members of the community on an ongoing basis. This makes teaching ideal for those who enjoy dealing with people. Knowing the processes of interaction and communication in the classroom, mastering the social skills and abilities needed to foster learning and coexistence in the classroom, and dealing with discipline and conflict resolution problems.

Lifelong learning

Acquire strategies to stimulate student effort and promote their ability to learn on their own and with others and develop thinking and decision-making skills that facilitate personal autonomy, confidence and initiative.

To be a teacher is to be an eternal student, since it is when you teach a subject that you learn the most about it. Students' questions allow you to investigate in order to incorporate new events, technologies and new knowledge.

Channels

Channels Include:

1. Curricular designs
2. Plans and programmes
3. Direct contact
4. Meetings
5. Qualifications
6. Organisational documents
7. Virtual Platforms

Channels
How you deliver

Curriculum designs

Know the curricular contents of the subjects related to the corresponding teaching specialisation, as well as the body of didactic knowledge regarding the respective teaching and learning processes. Plan, develop and evaluate the teaching and learning process, promoting educational processes that facilitate the acquisition of the competences of the respective teaching.

Plans and programmes

Participate in the drawing up and development of the Centre Plan. Design and carry out formal and non-formal activities that contribute to making the centre a place of participation and culture in the environment; develop the functions of tutoring and guidance of students in a collaborative and coordinated manner; participate in the evaluation, research and innovation of teaching and learning processes.

Contact directly

In secondary education there are different direct channels for participation between families, teachers and students. These moments take place at the centre, among classmates, class meetings, management team, teaching teams, technical team for pedagogical coordination and tutorials. In addition, families and teachers can participate in the School Council of the centre.

Meetings

Cooperation and partnership are essential for the success of secondary education. For this reason, the team of teachers must carry out coordinated activities based on respect for each other. The educational project of the schools must consider respect, coordination and sharing in order to achieve significant learning for the students.

Channels
How you deliver

Qualifications
Students' grades are given to their families. In other words, the development achieved by each student in terms of the learning acquired is assessed, as well as personalised reports with recommendations for their academic, personal and professional future.
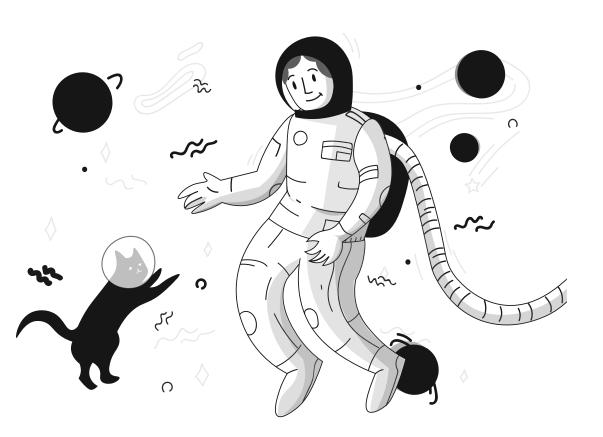
Organisational documents
Long-term and short-term planning documents that allow the educational community to be informed of all the activities and actions that are carried out in the educational center at an organizational, curricular and management level.

Virtual Platforms
Through virtual platforms, a reciprocal information channel is opened for families about events and academic, personal and/or evolutionary aspects of their children.

Customer relationships

Customer relationships Include:

1. Faculty
2. Student body
3. Educational Centre
4. Management Team

Customer relationships
Roles/Relationships

Teachers
Relations with the teaching staff will take place through collaboration and involvement of the parties in getting to know the students and in the development of plans and programmes. .

Students
Relationships with the learner will take place primarily in the classroom through didactic interaction.
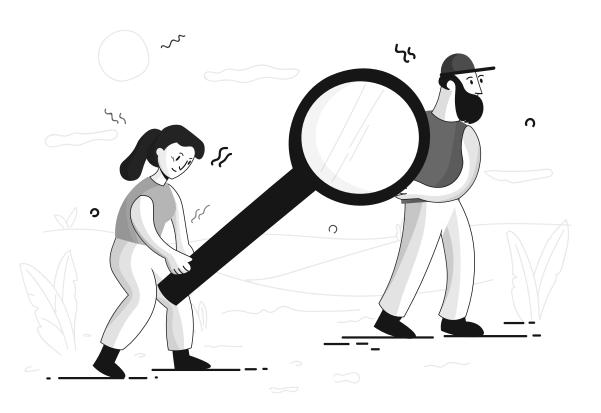
Families
Relations with families will take place through formal or informal meetings for training or exchange of information on the educational process of the students.

Management teams
Relations with management teams as well as other coordination bodies will take place through working sessions, group sessions for the design and revision of institutional plans and programmes, school regulations or teacher training.

Key Partners

Key Partners Include:

1. University-Faculty
2. Educational Administration
3. Educational Institutions
4. Colleagues

Key Partners
Who helps you

University-Faculty

The Faculties as the bodies in which the Master's degrees leading to the acquisition of the competences of Secondary Education Teachers are taught are one of the main support agents. In these faculties, the studies leading to the necessary qualifications to be able to exercise the teaching profession are developed, thus providing the knowledge and skills necessary for the professional future.

Educational Administration

The educational administration accompanies teachers in their professional development and offers tools and resources for their evaluation, improvement and renewal, seeking their adaptation to the new realities demanded by society.

Educational Institutions

The schools themselves in which teachers carry out their daily work become one of their main supports. Schools as communities and organisations provide teachers with a context in which to develop as professionals, making available to them all the material and human resources at their disposal.

Colleagues

The colleagues with whom teachers meet throughout their professional career are essential. The teaching task requires teamwork and coordination, so that colleagues from the beginning of initial training and subsequent professional development are sources of learning and continuous help.

Revenue and benefits

Revenue and benefits Include:

1. Vocation
2. Interaction with the educational community
3. Flexibility and creativity
4. Living from your vocation
5. Salary
6. Social recognition
7. Leadership

Revenue
What you get

Vocation
The teaching vocation is a concept traditionally linked to the inner call a person receives towards teaching. Answering this call through teaching is a source of satisfaction.

Interaction with the educational community
The interaction with the different members of the educational community, the exchange of ideas, opinions and the learning that this entails is another of the benefits of this profession.

Flexibility and creativity
Teaching work is characterised by flexibility and creativity. Teachers develop their creativity on a daily basis and require it in order to be able to respond to the professional challenges they face. At the same time, their work is flexible, allowing each teacher to work according to their own characteristics and beliefs.

Living from your vocation
Those who feel called to teaching have a true vocation. Teachers work most of the time with their students for whom they are mentors, guides and role models, which is a motivation to go to work every day.

Salary
Teachers have an average salary that provides stability and security. This annual salary as a guide in some European countries can be: Germany 50,357€; Spain 31,609€; Portugal 25,440€; Italy 23,601€; Greece 15,435€; Poland 14,338€

Social recognition
The teaching profession enjoys good social recognition, as it is seen as a professional who influences the construction of the society of the future.

Leadership
Leadership is the ability of a person to influence, motivate, organise and carry out actions to achieve his or her aims and objectives involving individuals and groups within a framework of values. The teacher, as a leader, must be the engine of social change, giving his or her followers the confidence, hope, enthusiasm, commitment and positive energy to achieve their goals. The ability to listen and to communicate are two of the most important competencies that a good teacher leader must cultivate.

Costs

Costs Include:

1. Availability
2. Ongoing training
3. Stress
4. Time pressure
5. Pressure from the educational administration
6. Conflicts

Costs
What you give

Availability
The teacher is a professional who is always available to contribute to the development of his or her students, as well as to guide families. This availability can generate tensions and limit personal time.

Lifelong learning
Continuous training is a real need that teachers face in order to be able to respond to the continuous challenges of their day-to-day work in the classroom. It is therefore a requirement derived from their work which they must meet in order to guarantee the quality of their teaching.

Stress
The stress of daily challenges and the bureaucratic burden is one of the main obstacles faced by secondary school teachers.

Time pressure
Teachers are under great pressure to adjust their programmes to a given time frame.

There is a great deal of content to be covered at this stage of education and a wide range of objectives to be pursued, all of which must fit into the strict rhythms of the school day.

Pressure from Education Administration
The education administration often puts pressure on teachers to solve, act and improve in a short period of time. They are often required to carry out bureaucratic tasks related to the control and quality of teaching, which forces them to extend their working hours outside the workplace.

Conflicts
As a result of the continuous interactions in which the teacher is involved with the rest of the educational community, conflicts arise. The teacher faces numerous conflicts with the various members of the educational community on an almost daily basis. Their own well-being and the working environment in which they work will depend on their ability to resolve them calmly and peacefully.

Golden Reads

	5 GOLDEN READS FOR SECONDARY EDUCATION TEACHER	LINK AMAZON
#1	Capel, S., Leask, M., & Younie, S. (2019). *Learning to teach in the secondary school: A companion to school experience*. Routledge.	https://www.amazon.com/Learning-Teach-Secondary-School-Experience/dp/1138307599
#2	Kellough, R. D., & Kellough, N. G. (2010). *Secondary school teaching: A guide to methods and resources.* Pearson.	https://www.amazon.com/Secondary-School-Teaching-Methods-Resources/dp/0137049773
#3	Dweck, C. S. (2007). *Mindset: The new psychology of success.* Ballantine Books.	https://www.amazon.com/Mindset-Psychology-Carol-S-Dweck/dp/0345472322
#4	Gajic, D., & McGinty, J. (2022). *Learning to Teach Psychology in the Secondary School: A Companion to School Experience*. Routledge.	https://www.amazon.com/Learning-Psychology-Secondary-School-Subjects/dp/0367753650
#5	Capel, S., Leask, M., & Turner, T. (2006). *Starting to teach in the secondary school: A companion for the newly qualified teacher.* Routledge.	https://www.amazon.com/Starting-Teach-Secondary-School-Companion/dp/0415338174

Personal Business Model Canvas

SME Business Consultant

Author: Gastão Marques, Maria José Varadinov (IPP)

SME Business Consultant | Personal Service Model

Who Helps You

Companies' Managers

Other Consultants

Specialized workers

Firms with complementary services

Information sources

Schools with courses

What You Do

Communicate with clients.
Perform industry research.
Analyse clients performance.
Develop strategies, structures, policies, processes and tasks.
Present ideas to clients.
Implement strategies, structures, policies, processes and tasks.

Who You Are

Bachelor's degree.
Knowledge on management.
Communication skills.
Problem-solving skills.
Critical thinking.
Collaborative skills.

Benefits You Offer

Strategy, structures, politics, processes and tasks competitiveness.
Business development.

Insights to help the company:
Address key challenges and concerns;
Identify new ways to grow;
Improve competitiveness.

Help to understand:
Competition;
Changes in customer preference;
Firm's competitiveness:
Efficiency, effectiveness, productivity, sustainability and profitability.

Roles/Relationships

Co-creation with costumers to design tailored solutions for their business challenges, to generate value and succeed in a new digital era.

Who You Deliver

As an independent professional

Belonging to a Consulting company

Who You Help

Any SME:
- Senior executives
- Entrepreneurs
- Managers
- Specialized workers

Costs and Consequences

Educational costs
Keeping upgraded costs
Data research costs
Eventual traveling and lodging costs

Stress
Overwork
Time constraints
Family problems

Compensation and Rewards

Senior Consultant
€156.123/year

Consultant
€131.400/year

Eventual bonus

Satisfaction
Recognition
Social contribution
Reputation

573

Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities
Who you are

Abilities and Soft Skills

- **Communication skills:**
  - Excellent verbal and written communication skills to clearly articulate the insights from findings to costumers management;
  - Explain his/her area of expertise clearly to costumers management;

- **Problem-solving skills:**
  - Intellectually curious individuals with strong creative and imaginative prowess to generate ideas to solve business problems, either presented by costumers or not;

- **Critical thinking:**
  - Strong critical thinking abilities to draw sound conclusions from information and various data sources at their disposal. It is crucial that they
  can separate relevant information
  from less vital ones with respect to solving a particular business problem;

- Capacity to analyse data objectively, applying logical thought and proffering solutions, taking short term as long-term perspectives;
- Attention to detail;

- **Comfort with ambiguity:**
  - Decision making involves some level of uncertainty, so it is important to be comfortable with ambiguity inherent to any SME's business problem;

- **Collaborative skills:**
  - Interpersonal skills with both managers and workers;
  - Be able to work with cross-functional teams and have the maturity to interact directly with senior executives across departments;
  - Provide leadership to teams on the implementation of initiatives, both consultancy teams or costumer's teams.
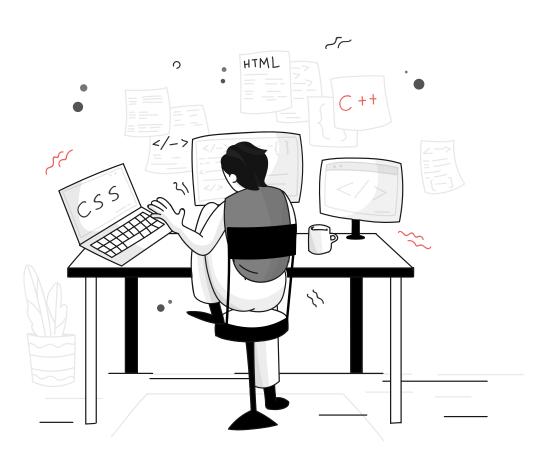
Skills, abilities
Who you are

Hard Skills

- **Education: a minimum of a Bachelor's degree in:**
  - Business Administration;
  - Information Technology;
  - Information Management;
  - Economics;
  - Finance;
  - Engineering;
  - Or in a related field;
- **Knowledge:**
  - Business strategy and business diagnosis;
  - Business case analysis and development skills;
  - Organizational theory;
  - Processes development;

- **Expertise to develop measures that turn ideas into actions:**
  - A proven history of implementing and executing business ideas;
  - At least two years hands-on experience in management consulting;
  - Act as the "go to" person for questions and problems within his/her area of expertise;
- **Computer skills:**
  - Possession of advanced excel skills;
  - And be proficient in PowerPoint for presentation purposes;
- Fluent in English.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

The **SME Business Consultant**'s job involves responsibility for business development and putting plans into action.

Here are examples of responsibilities representing typical tasks they are likely to perform in their roles:

- Some primary duties of this position include:
  - Communicating with the client;
  - Performing industry research;
  - Analysing client performance;
  - Developing a strategy for the SME;
  - Presenting ideas to a client;
  - Strategy, structures, politics, processes and tasks implementation;
- Before a SME Business Consultant can do anything, it's usually necessary for him to communicate with the client, usually managers.

During this time, he might go over the client's current circumstances and determine what the client's expectations are;

- After an initial client consultation, an analyst will often perform some industry research. Getting a clear idea of how each client's industry works and assessing the competition is helpful for creating an effective strategy and competitive organizational solutions;
- Along with this, a SME Business Consultant will spend a considerable amount of time analysing his client's performance. This information will ultimately determine the type of business strategy and structures, policies, processes and tasks that should be implemented;

Key actions
What you do

- The next phase of this job typically involves developing a strategy, the structure, politics, processes and tasks to improve SME's competitiveness. Specifics can differ considerably between clients, so a SME Business Consultant will need to devise an entirely individual plan for each client;
- Presenting his findings to a client is an additional part of the job. Typically, this is the final phase of each project and involves presenting what was learned from industry research, competitor's information, and client performance. Ideas for improvement will also be shared. For this, a SME Business Consultant will sometimes make use of tools like charts and graphs, or use computer-based presentations to demonstrate his findings;

- Concerning the client analysis:
  - Structure and perform analysis and conduct primary research to uncover insights, identify and validate value creation opportunities at Clients;
  - Use of customer data from CRM and customer research to understand trends and identify opportunities;
  - This would help drive revenue, increase yield, improve market share, and aid customer retention;
  - Develop an understanding of how Clients operate and how technology can be leveraged to create new value streams and improve efficiency, effectiveness, productivity and profitability (competitiveness);
- Concerning developing strategy:
  - Work with Client teams to shape solutions;

Key actions
What you do

- Provide significant insights to help organizations;
- Present at team and Client meetings, and determine the most practical way to drive lasting results based on insights and analysis;
- Identify key strategic drivers through structured analysis and conceptual thinking to effectively probe problems and causes;
- Lead the consulting sessions of organizations.
- The consultants do their duties with rate strategy, structures, policies, processes and tasks proposals in line with corporate objectives;
- Concerning the measures presentation:
  - Communicate effectively and persuasively in a business context;

- Define procedures or standards, since he/she has the knowledge of what the right or best way to execute a task would be;
- Define performance objectives and determine acceptable performance levels;
- Provide recommendations for procedural improvements;
- Concerning implementation:
  - Help Clients navigate disruption, restructuration and understand the transformative impact of leading edge technology;
  - Manage businesses, determine growth areas, and make model analysis for recommendations;
  - Not only answer how things are done, but why.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

Any SME of any industry.

As long as there is a business competitiveness to improve, i.e. strategy, structure/organization, profitability, sustainability, productivity, digital concerns, marketing...

In this way you help senior executives/entrepreneurs, managers and/or workers involved in the business problem under analysis and development.

Usually you report to senior executives/entrepreneurs and/or managers, depending in your experience and the nature of the problem at hands.

As a member of a team you should help your mates too.

If the consultancy service involves several firms/experts, you should articulate any initiatives/solutions with them too.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

The SME Business Consultant performs various functions, which primarily involves utilizing data to provide support for:
- Strategy, structures, policies, processes and tasks competitiveness;
- Business development.

The specific tasks they handle will vary depending on the industry they work in.

They are responsible for providing relevant insights to help the company:
- Address key challenges and concerns;
- Identify new ways to grow;
- Improve competitiveness.

In this way, SME Business Consultants identify a business' needs and develop plans that

determine the direction a company can take and to actualize its goals, providing, communicating, and implementing strategies to address:
- Competition;
- Changes in customer preference;
- Firm's competitiveness:
  - Efficiency, effectiveness, productivity, sustainability and profitability.

Support the definition of processes and policies, supply business rules and procedures, and communicate the contexts in which the rules, processes and polices are applied.

Understand requisite knowledge that underlies effective decision-making and is able to describe where anomalies or flaws may occur in the decision-making processes.

Value proposition
Benefits you offer

In this way, a SME Business Consultant utilizes data to solve key business problems. They gather, review, and test data and apply many measures to provide solutions to critical business issues and decisions.

Involving research and analysing industry trends and determining how to optimize a business.

They address business problems with a short as long-term views.

Since management is usually focused on the internal workings of a company rather than the external business environment, an independent consultant with a fresh, unbiased
outlook can help immensely.

The opportunities to make a difference within exciting Client initiatives are limitless in the present ever-changing business landscape.
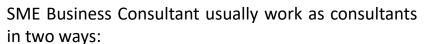
Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
    1. How will potential Customers discover how you can help them?
    2. How will they decide whether to buy your service?
    3. How will they buy it?
    4. How will you deliver what Customers buy?
    5. How will you follow-up to make sure Customers are happy?

Channels
How you deliver

SME Business Consultant usually work as consultants in two ways:

- Independent professionals;
- Belonging to a consulting company.

Your experience and successful consultancies will pave the road ahead to get more and more interesting costumers, where the word of mouth advertising is a common and effective way in this industry.
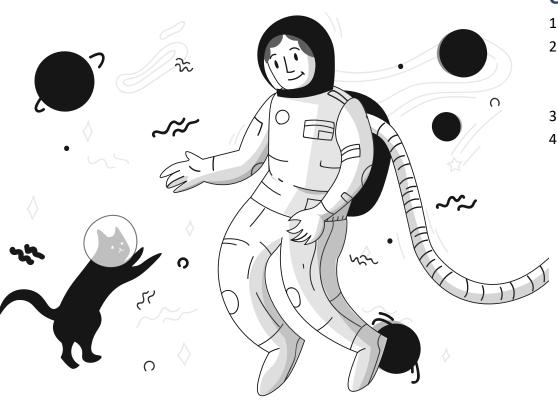
In the key Partners section some ideas to get clients are provided.

Besides these, advertising in specialized journals, events and digital medias are the most common ways to get noticed.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

Work with clients to develop an effective business development to maximize profits and stay competitive.

Co-creation with costumers to design tailored solutions for their business challenges, to generate value and succeed in a new digital era.

Influence of costumers' agendas through insight, enabling them to make bold decisions on priority business challenges.

In general, this means to be a change agent through the different activities inherent to a consultant professional, as described in the Key Actions' section.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

SME Business Consultant usually work closely with:
- Senior executives/entrepreneurs;
- Managers;
- Workers (usually specialized ones);
- Other consultants.

In general consultant activities are made under a co-creation basis, this means everybody involved in the business problem at hands is a "partner" working under a collaboration basis, either if belongs to a dedicated team or not. Because consultants don´t have the power to make decisions, they study the problems, make research, propose solutions and need to "sell" them (explaining their pertinence and advantages).

As partnership resources, any source of information is important:
- Public bodies;
- Research firms;
- Industry associations and the like;
- Literature on any base (physical and digital);
- Other sources.

To get costumers any partnership is interesting, for instance under a complementary base of services' offer:
- Accountant firms;
- Advertising agencies;
- Other firms;
- Personal contacts;
- Industry associations.

Schools are important to be actualized along time through short/medium term courses.

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Some data points for the following revenues:

- **Senior Consultant**
  - €156,123/year

- **Consultant**
  - €131,400/year

Eventual bonus.

Besides the money side, the satisfaction to see your ideas work is very gratifying.

Working as a SME consultant in the present environment is a strong source of new ideas, knowledge, experiences, e.g. strong professional development.

As an independent consultant you can have flexible hours of work.

In overall, contributing for firms competitiveness is an effective way to contribute for community's incomes and quality of life.

Being a successful consultant earns recognition between your pairs and from clients and the community, e.g. reputation.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

The main costs supported by SME Business Consultants are:
- Educational costs;
- Keeping upgraded costs;
- Data research costs;
- Eventual traveling and lodging costs.

Depending on clients and the nature of the business problem at hands, consultants can be under several pressures:
- Time constraints;
- Stress;
- Overwork;
- Non collaborative team mates;
- Beside other situations.

Working in a consultancy firm can mean competitive working places, implying stress, overwork, difficulties to career progress and the like.

In a everyday changing business world it is difficult to keep actualized and aware of the trends and new paradigms emerging and under development. Under a overwork basis this means a high probability to don´t be market aligned.

Working many hours a day and/or in weekends and holidays usually means family problems.

Golden Reads

	5 GOLDEN READS FOR SME BUSINESS CONSULTANT	LINK AMAZON
#1	Rasiel, E. M. (1999). *The McKinsey Way: Using the Techniques of the World's Top Strategic Consultants to Help You and Your Business.* McGraw-Hill.	https://www.amazon.com/McKinsey-Way-Ethan-M-Rasiel/dp/0070534489
#2	Block, P. (2011). *Flawless Consulting: A Guide to Getting Your Expertise Used.* Pfeiffer.	https://www.amazon.com/Flawless-Consulting-Guide-Getting-Expertise/dp/0470620749
#3	Rosiel Ethan, M., & Friga Paul, N. (2001). *The McKinsey Mind: Understanding and Implementing the Problem-Solving Tools and Management Techniques.* McGraw-Hill.	https://www.amazon.com/McKinsey-Mind-Understanding-Implementing-Problem-Solving/dp/0071374299
#4	Maister, D. H., Galford, R., & Green, C. (2021). *The Trusted Advisor.* Free Press.	https://www.amazon.com/Trusted-Advisor-20th-Anniversary/dp/1982157100
#5	Koller, T., Goedhart, M., & Wessels, D. (2020). *Valuation: measuring and managing the value of companies.* Wiley.	https://www.amazon.com/Valuation-Measuring-Managing-Companies-Finance/dp/1119610885

Personal Business Model Canvas

Strategy Analyst

Author: Gastão Marques, Maria José Varadinov (IPP)

Strategy Analyst | Personal Service Model

Who Helps You

Growth and Sales teams
Business Development teams
Product teams

Firms with complementary services

Information sources

Schools with courses

What You Do

Communicate with clients or managers
Perform industry research
Analyse clients or firm performance
Develop strategies
Present ideas to clients or managers
Implement Strategies

Who You Are

Bachelor's degree
Knowledge of data management
Communication skills
Problem-solving skills
Critical thinking
Collaborative skills

Benefits You Offer

New Strategies enabling Business development and/or growth

Insights to help the company:
Make the right decisions;
Address key challenges and concerns;
Identify new ways to grow.

Help to understand:
Competition;
Changes in customer preference;
Changes in:
Technology;
Marketing tools.

Roles/Relationships

Co-creation with costumers or managers to design strategies for their business challenges, to generate value and succeed in a new digital era.

Who You Deliver

As an independent professional

Belonging to a Consulting company

In companies

Who You Help

IT companies
Financial institutions
Manufacturing companies
Retail businesses

Anyone needing help for a strategic decision to be made:
- Senior executives
- Entrepreneurs
- Managers

Costs and Consequences

Educational costs
Keeping upgraded costs
Data research costs
Eventual traveling and lodging costs

Stress
Overwork
Time constraints
Family problems

Compensation and Rewards

Senior Strategy Manager
€156.123/year

Strategy Manager
€131.400/year

Eventual bonus

Satisfaction
Recognition
Social contribution
Reputation

598

Personal Key Resources

**Personal Key Resources
include who you are:**

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities
Who you are

Abilities and Soft Skills

- **Communication skills:**
  - Excellent verbal and written communication skills to clearly articulate the insights from findings to management and relevant stakeholders;

- **Problem-solving skills:**
  - Intellectually curious individuals with strong creative and imaginative prowess to generate ideas to solve business problems;

- **Critical thinking:**
  - Strong critical thinking abilities to draw sound conclusions from information and various data sources at their disposal. It is crucial that they can separate relevant information from less vital ones with respect to solving a particular business problem;

- Capacity to analyse data objectively, applying logical thought and proffering solutions, taking a long-term perspective;
- Attention to detail;

- **Comfort with ambiguity:**
  - Decision making involves some level of uncertainty, so it is important to be comfortable with the ambiguity inherent to strategic issues, e.g. specially the medium and long term forecastings;

- **Collaborative skills:**
  - Interpersonal skills;
  - Be able to work with cross-functional teams and have the maturity to interact directly with senior executives across departments;
  - Provide leadership to teams on the implementation of strategic initiatives.

Skills, abilities
Who you are

Hard Skills

- **Education: a minimum of a Bachelor's degree in:**
    - Business Administration;
    - Computer Science;
    - Information Technology;
    - Information Management;
    - Economics;
    - Statistics;
    - Finance;
    - Engineering;
    - Or in a related field;

- **Knowledge:**
    - Business strategy and business diagnosis;
    - Strategic planning;
    - Business case analysis and development skills;

- **Expertise to develop strategies that turn ideas into actions:**
    - A proven history of implementing and executing business ideas;
    - At least two years hands-on experience in:
        - Analytics;
        - Or management consulting;
    - Advanced knowledge of data management and SQL for data manipulation;
    - Programming experience (Python, R, etc.);

Skills, abilities
Who you are

Hard Skills

- **Strong quantitative and financial modelling skills:**
  - Work with large data sets to provide analytical support to all aspects of the business;
  - Performing financial modelling for financial planning purposes, therefore, it is vital that can perform financial modelling to be considered for hiring;

- **Computer skills:**
  - Possession of advanced excel skills;
  - And be proficient in PowerPoint for presentation purposes;

- **Fluent in English.**

These skills will be very important to enable the execution of the activities explained in the Personal Key Activities section.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions

What you do

The Strategy Analyst's job involves responsibility for strategy (planning, prioritization, and decision making), and putting plans into action.

Here are examples of responsibilities representing typical tasks they are likely to perform in their roles:

- Some primary duties of this position include:
  - Communicating with the client;
  - Performing industry research;
  - Analysing client performance;
  - Developing a strategy;
  - Presenting ideas to a client;
  - Strategy implementation;
- Before a strategy analyst can do anything, it's usually necessary for him to communicate with the client. During this time, he might go over the client's current circumstances and determine what the client's expectations are;

- After an initial client consultation, an analyst will often perform some industry research. Getting a clear idea of how each client's industry works and assessing the competition is helpful for creating an effective strategy;
- Along with this, a strategy analyst will spend a considerable amount of time analysing his client's performance. This information will ultimately determine the type of business strategy that should be implemented;

Key actions

What you do

- The next phase of this job typically involves developing a strategy. Specifics of a strategy can differ considerably between clients, so a strategy analyst will need to devise an entirely individual plan for each client;
- Presenting his findings to a client is an additional part of the job. Typically, this is the final phase of each project and involves presenting what was learned from industry research, competitor's information, and client performance. Ideas for improvement will also be shared. For this, a strategy analyst will sometimes make use of tools like charts and graphs, or use computer-based presentations to demonstrate his findings;

- Concerning the client analysis:
  - Structure and perform analysis and conduct primary research to uncover insights, identify and validate value creation opportunities at Clients;
  - Use of customer data from CRM and customer research to understand trends and identify opportunities;
  - This would help drive revenue, increase yield, improve market share, and aid customer retention;
  - Develop an understanding of how Clients operate and how technology can be leveraged to create new value streams;
- Concerning developing strategy:
  - Work with Client teams to shape solutions;

Key actions
What you do

- Provide significant insights to help organizations;
- Present at team and Client meetings, and determine the most practical way to drive lasting results based on insights and analysis;
- Identify key strategic drivers through structured analysis and conceptual thinking to effectively probe problems and causes;
- Lead the consulting sessions of organizations.
- The analysts do their duties with rate strategy proposals in line with corporate objectives;
- Concerning the strategy presentation:
  - Communicate effectively and persuasively in a business context;
- Concerning strategy implementation:
  - Help Clients navigate disruption and understand the transformative impact of leading edge technology;
  - Create new pricing, products, and e-commerce plans;
  - Coordinate and implement sales and marketing programs. Additionally, negotiate, devise, and implement vendor agreements, distribution relationships, and partner agreements;
  - Manage businesses, determine growth areas, and make model analysis for strategy recommendations; Advise top management on communications and improving strategic partnerships and alliances;

Key actions
What you do

- Present reimbursement recommendations and operational strategies to internal and external executive management in order to maximize ROI.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

Different industries, for instance:
- IT companies;
- Financial institutions;
- Manufacturing companies;
- Retail businesses.

As long as there is a strategic decision to be made.

In this way you help mainly senior executives/entrepreneurs and top managers in any strategical situation.

Usually you report to senior executives/entrepreneurs depending in your experience and the nature of the problem at hands.
As a member of a team you should help your mates too.

If it is the case, you should articulate any studies/initiatives/solutions with external consultants and/or other service firms involved in the project.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

The Strategy Analyst is expected to enable firms to have and implement successful strategies.

The specific tasks they handle will vary depending on the industry they work in.

They are responsible for providing relevant insights to help the company:
- Make the right decisions;
- Address key challenges and concerns;
- Identify new ways to grow.

In this way, Strategy Analysts identify a business' needs and develop plans that determine the direction a company can take and to actualize its goals, providing, communicating, and implementing strategies to address:
- Competition;
- Changes in customer preference;
- Improvements in:
  - Technology;
  - Marketing tools.

Sometimes Strategy Analysts are also responsible for:
- Develop pricing strategies and models;
- Build a pipeline of opportunities for partnerships.

Value proposition
Benefits you offer

In this way, a Strategy Analyst utilizes data to solve key business problems. They gather, review, and test data and apply many measures to provide solutions to critical business issues and decisions.

Involving research and analysing industry trends and determining how to optimize a business.

They address business problems with a long-term view, but when necessary, they assist in the short-term too.

Since management is usually focused on the internal workings of a company rather than the external business environment, an independent analyst with a fresh, unbiased outlook can help immensely.

The opportunities to make a difference within exciting Client initiatives are limitless in the present ever-changing business landscape.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
    1. How will potential Customers discover how you can help them?
    2. How will they decide whether to buy your service?
    3. How will they buy it?
    4. How will you deliver what Customers buy?
    5. How will you follow-up to make sure Customers are happy?

Channels
How you deliver

Strategy analysts usually work as consultants in two ways:
- Independent professionals;
- Belonging to a consulting company.

Your experience and successful consultancies will pave the road ahead to get more and more interesting costumers, where the word of mouth advertising is a common and effective way in this industry.
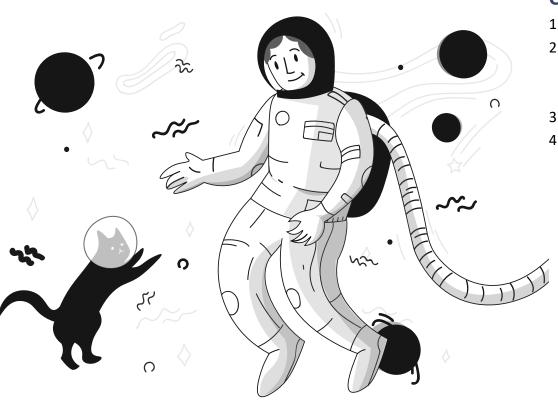
In the key Partners section some ideas to get clients are provided.

Besides these, advertising in specialized journals, events and digital medias are the most common ways to get noticed.

Big firms usually have their own Strategy department, where we find strategy analysts working too.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

<u>Work</u> with either clients (when the strategic analyst is a consultant) or senior executives/entrepreneurs/managers (when he/she belongs to the firm) to develop an effective business strategy to maximize profits and stay competitive.

<u>Co-creation</u> with costumers (when the strategic analyst is a consultant) or senior executives/entrepreneurs/managers (when he/she belongs to the firm) to design tailored solutions for their business challenges, to generate value and succeed in a new digital era.

<u>Influence</u> of costumers' agendas (when the strategic analyst is a consultant) or senior executives/entrepreneurs/managers (when he/she belongs to the firm) through insight, enabling them to make bold decisions on priority business challenges.

In general, this means to be a <u>change agent</u> through the different activities inherent to a strategy analyst professional, as described in the Key Actions' section.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

Strategy analysts usually work, to increase market share, closely with:
- Product teams;
- Growth and Sales teams;
- Business Development teams.

As partnership resources, any source of information is important:
- Public bodies;
- Research firms;
- Industry associations and the like;
- Literature on any base (physical and digital);
- Other sources.

To get costumers (when work as consultants) any partnership is interesting, for instance under a complementary base of services' offer:
- Accountant firms;
- Advertising agencies;
- Other firms;
- Personal contacts;
- Industry associations.

Schools are important to be actualized along time through short/medium term courses.

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Some data points for the following revenues:

- **Senior Strategy Manager**
  - €156,123/year

- **Strategy Manager**
  - €131,400/year

- Average Years of Experience:
  - 0 – 1   31%
  - 2 – 4   58%
  - 5 – 7   4%
  - 8+   7%

Not including years spent in education and/or training.

Eventual bonus.

Besides the money side, the satisfaction to see your ideas work is very gratifying.

Working in strategic matters in the present environment is a strong source of new ideas, knowledge, experiences, e.g. strong professional development.

As an independent consultant strategy analysts can have flexible hours of work.

In overall, contributing for firms competitiveness is an effective way to contribute for community's incomes and quality of life.

Being a successful strategy analyst earns recognition between pairs and from clients (if work as consultant) and the community, e.g. reputation.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

The main costs supported by strategy analysts are:
- Educational costs;
- Keeping upgraded costs;
- Data research costs;
- Eventual traveling and lodging costs.

Strategy analysts can work under several pressures:
- Time constraints;
- Stress;
- Overwork;
- Non collaborative team mates.

Working in a consultancy firm can mean competitive working places, implying stress, overwork, difficulties to career progress and the like.

In a everyday changing business world it is difficult to keep actualized and aware of the trends and new paradigms emerging and under development. The medium and long term forecasting activities are increasingly more and more difficult to define. Under a overwork basis this means a high probability to don´t be market aligned.

Working many hours a day and/or in weekends and holidays usually means family problems.

Golden Reads

	5 GOLDEN READS FOR STRATEGY ANALYST	LINK AMAZON
#1	Rumelt, R. P. (2017). *Good Strategy/Bad Strategy: The difference and why it matters.* Profile Books.	https://www.amazon.com/Good-Strategy-Bad-difference-matters/dp/1781256179
#2	Kim, W. C., & Mauborgne, R. (2015). *Blue Ocean Strategy: How to create uncontested market space and make the competition irrelevant.* Harvard Business Review Press.	https://www.amazon.com/Blue-Ocean-Strategy-Expanded-Uncontested/dp/1625274491
#3	Porter, M. E. (1998). *Competitive strategy: Techniques for analyzing industries and competitors.* Free Press.	https://www.amazon.com/Competitive-Strategy-Techniques-Industries-Competitors/dp/0684841487
#4	Dixit, A. K., & Nalebuff, B. (2010). *The Art of Strategy: a game theorist's guide to success in business & life.* WW Norton & Company.	https://www.amazon.com/Art-Strategy-Theorists-Success-Business/dp/0393337170
#5	Lafley, A. G., & Martin, R. L. (2013). *Playing to win: How strategy really works*. Harvard Business Review Press.	https://www.amazon.com/Playing-Win-Strategy-Really-Works/dp/142218739X

Personal Business Model Canvas

Supply Chain Specialist

Author: Clio Dosi, Roberta Lozzi, Matteo Vignoli (UNIBO)

Supply Chain Specialist | Personal Service Model

Who Helps You

Legal department

In case of strategic supply partnership with suppliers, suppliers can also be considered like partners

Some service providers can bring improvements such as Internet of Things, Analytics, Cloud computing And Automation

What You Do

The supply chain involves different areas such as supplier management, quality management, product distribution management and internal process management

Who You Are

She is the intermediary who will ensure the consistency, efficiency and effectiveness of the entire value chain

Benefits You Offer

to make available what is needed, where it is needed at the best possible cost

to ensure that the company's operating system responds to the strategy and needs proposed

She has the opportunity to strategically impact budgeting as well

Roles/Relationships

Sales and Marketing Department, Research and Development Area, Production Area, Production departments and Maintenance Department

Who You Deliver

Interfaces with suppliers, sub-suppliers and those responsible for individual production processes

Who You Help

suppliers, sub-suppliers,

internal production departments

internal customers in the chain

Costs and Consequences

Monitoring and emergency response, Willingness to move and flexibility (if in purchasing area)

Continuing Education, Sensitivity and communication skills, Ability to handle stress

Compensation and Rewards

The range is quite wide: with a couple of years of experience, the average salary of a Supply Chain Specialist is 33,500 euros

It could be added the variable part related to the achievement of objectives that companies usually recognize to this figure, ranging between 5 and 10% per year.

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Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Skills, abilities

Who you are

The **Supply Chain Specialist** is the intermediary who will ensure the consistency, efficiency and effectiveness of the entire value chain, from the procurement process to the final distribution, acting as a link between the different business functions and the players in the supply chain (suppliers, sub-suppliers, distributors, customers ..).

It's a very wide job, there are various paths that can be taken and different areas in which to specialize and work and can therefore be placed in different types of company and then interact with different figures:

- **Manufacturing Companies**: that process raw materials or semi-finished products to transform them into goods, in which the Supply Chain Specialist manages procurement, purchasing and sales, and generally supervises all phases of production.

- **Commercial Companies**: that deal with retail distribution, such as supermarkets, hypermarkets and department stores, or companies that deal with wholesale distribution. In this industry, the purchasing technician is employed in the area of procurement, purchasing and sales.

- **Service Companies**: that deal with the provision of services but, in order to do so, need supplies, which may involve office products, technical and specialized equipment, services such as internet or telephony, or products of another nature.

Skills, abilities
Who you are

Hard Skills:
- Preferred placement paths: Bachelor's degree in management engineering, transportation and logistics engineering, mechanical engineering or economics and management;
- Computer skills including the office package and in particular Excel;
- Analytical/Mathematical Skills;
- Good knowledge of both written and spoken English;
- Understanding of industrial accounting;
- Familiarity with budgeting, reporting, and achieving budgets;
- Knowledge of the company's product characteristics and manufacturing processes.
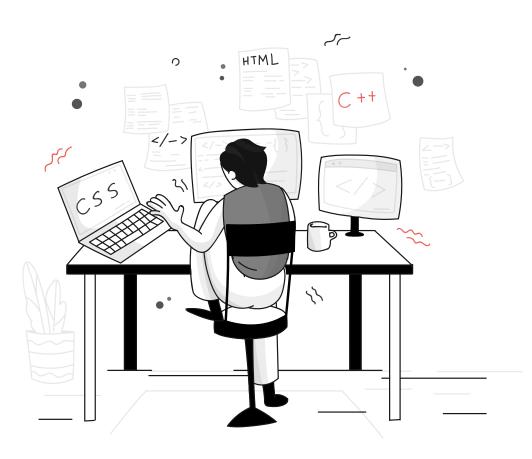
Soft Skills:
- Reliability and punctuality;
- Digital dexterity;
- Time Management Skills;
- Negotiation Skills;
- Propensity for conflict management;
- Adaptability and flexibility;
- Good problem solving skills;
- Readiness to deal with unexpected situations and ability to find quick and effective solutions;
- Leadership and group work organization skills;
- Analytical and organizational and planning skills;
- Ability to translate strategic plans into operational goals and operational performance into strategic monitoring;
- Ability to anticipate the needs of the business and predict the likely consequences and possible risks of changes made at each level of the supply chain;
- Ability to communicate complicated technical cases in an easy and understandable manner;
- Ability to make decisions with few elements and little time rather than waiting for the perfect situation but having negative consequences (effectiveness vs. efficiency).

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Responsabilities

The supply chain involves different areas such as supplier management, quality management, product distribution management and internal process management, so there are different tasks that a Supply Chain Specialist can cover. Depending on the job there are different activities and responsibilities, which are unlikely to be carried out all by the same profile, which can be:

- **Manage inbound material procurement planning** in accordance with purchasing department and suppliers for inventory entry planning and evaluate at a strategic level possible alternatives.
- **Manage inbound flow at** the operational level.
- **Manage** the **scheduling** of subcontracting activities.
- **Supplier and sub-supplier analytics**: performance measurement, trend and trend verification, comparison and benchmarking and possible proposal of corrective solutions.
- Evaluation of **make-or-buy** opportunities.
- **Work with production planning** to manage the flow of goods (raw materials, semi-finished goods) at various stages of processing to different departments or production sites or of finished goods from production to the stock warehouse.
- **Monitor all materials used to create the final product to** ensure that these items are in place until the product is fully developed, i.e., for the entire length of the supply chain, so as not to disrupt the production chain or go into stock-outs.

Key actions
What you do

Responsabilities

- **Organize the shipment and transport of goods** to customers by developing a virtuous delivery system respecting the required time and quantity.
- **Manage external carriers and/or** company-owned **fleet of vehicles,** possibly negotiating contracts with suppliers in order to ensure the efficiency of the fleet of vehicles and coordinate transportation workers.
- **Check the efficiency of processes (goods flows, internal and external costs) and, if necessary, propose innovative solutions to optimize them:** review goods flows, activities and software tools.

- **Collect and analyze aggregate data to** identify weaknesses and critical issues through the use of management software.
- **Oversee all internal and external documentation** related to the flow of goods including compliance with storage regulations, any customs procedures for import and export and transportation of particular materials.
- **Find quick and effective solutions** to ensure business operations in the event of unforeseen events and technical difficulties.
- **Manage** both internal and external **staff** (e.g. porter cooperatives).

Customers

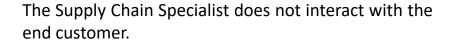## Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (project leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

The Supply Chain Specialist does not interact with the end customer.

The main subjects with which she interacts are suppliers, sub-suppliers, internal production departments or internal customers in the chain.

The Supply Chain Specialist can help with the marketing process, the manufacturing process, or the distribution process.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

The main value offered by the Supply Chain Specialist is to make available what is needed, where it is needed at the best possible cost: to ensure that the company's operating system responds to the strategy and needs proposed, for example by marketing, guaranteeing an effective and efficient coupling of demand with supply.
The Supply Chain Specialist has the opportunity to strategically impact budgeting as well.

Some of the possible opportunities that exist to create value are discussed below:

Ability to analyze and interpret aggregate data
End-to-end visibility of the entire supply chain in real time through a data-driven approach can make all the difference, even remotely, in identifying meaningful data and understanding what individual numbers, KPIs or statistics indicate and identifying any deviations.

Supply Chain Digitization
By digitizing all logistics operations, companies can reduce costs and save time, leading to greater overall efficiency.
Having complete visibility of the entire process allows to identify the most critical areas and manage vulnerabilities and disruptions in advance.

Choosing the best packaging
One of the fundamental aspects that a company must take care of in order to aim at maximizing profits also in logistics, is the choice of packaging (attention to weight, materials, disposal and reuse of the same packaging).

Minimizing "backflow"
It is also essential to take all the necessary steps upstream to minimize the "return flow", i.e. returns, by improving the logistic organization, at the basis of which there is a clear and direct exchange of information between all actors involved in the process.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
   5. How will you follow up to make sure Customers are happy?
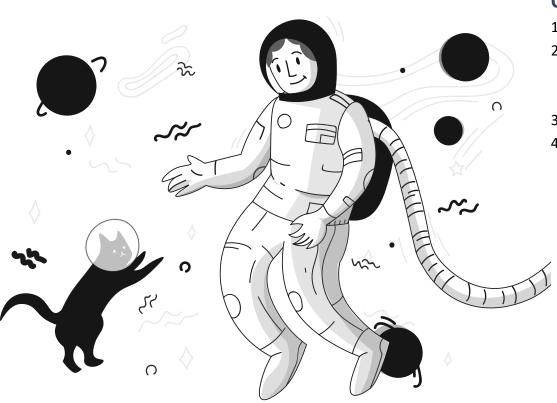
Channels
How you deliver

Typically, the request is intermediated by the person in the company who interfaces with the final client: the reference channel is the one that leads to the internal client (the company entity to which the supply chain provides its service).

Interfaces with suppliers, sub-suppliers and those responsible for individual production processes.

In case of strategic supply partnership with suppliers, suppliers can also be considered like partners.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" - written communication (e.g. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

Depending on the task performed the Supply Chain Specialist may work with:

- **Sales and Marketing Department** in the process of confirming orders to customers;
- **Research and Development** Area;
- **Production** Area;
- **Production departments for the supply of** materials and the optimization of phases and work cycles;

- **Maintenance Department** for the optimization of plant downtime;
- External collaboration with **Contract Manufacturers, Suppliers, Customers, Local Authorities, GMP Authorities;**
- **IT** Function In the implementation of the ERPe Corporate WMS for the optimization of processes related to the flow of goods and products.

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Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - ADVICE,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

- **Legal department:** can provide valuable assistance with regard to aspects of contracts and management of disputes with suppliers.

- **Suppliers:** these are the key players that most help the supply chain to function.

Some service providers that provide technicalities or tools that supply chain specialist can use to bring improvements to the way they work:

- **Internet of Things**

IoT enables the determination of items' exact real-time location, movement, and monitor their storage conditions, transforming inventory tracking and overall warehouse management.

- **Analytics**

Using quantitative data helps extrapolate information and optimize supply chain decision making. Advanced Analytics are now a valuable ally for Supply Chain Managers to make sense of all the data and information they collect.

- **Cloud computing**

Cloud computing allows you to integrate multiple platforms, take a scalable approach to solutions, make information and data available on demand, and bypass siloed management logic to make your supply chain more responsive and agile.

- **Automation**

Automation is one of the technological trends that is gaining ground in the world of logistics, partly because it allows people's time to be dedicated to more value-added activities.

Revenue and benefits

Revenue and Benefits Include:
1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Remuneration

The range is quite wide: with a couple of years of experience, the average salary of a Supply Chain Specialist is 33,500 euros, while that of a Supply Chain Manager ranges from 35,100 to 100,800 euros.

To these figures must be added the variable part related to the achievement of objectives that companies usually recognize to this figure, ranging between 5 and 10% per year.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Monitoring and emergency response

Need for significant presence and frequent monitoring because the supply chain must be kept under control: the Supply Chain Specialist must be ready to manage critical issues and intervene promptly when necessary.

Continuing Education

For example, a Supply Chain Specialist must have a solid understanding of the logistics industry, and continually keep up to date with the latest news and trends and take steps to develop and maintain their knowledge, skills and competencies.

Willingness to move and flexibility (if in purchasing area)

The Supply Chain Specialist's job is not a sedentary one and often does not take place in an office.
In the event of a problem of any kind the Supply Chain Specialist is called upon to cope and for this reason there may be no rigid timetable.

Ability to handle stress

The Supply Chain Specialist can often find himself at the center of problems of various kinds (e.g. difficulties in the supply of raw materials, hiccups in production, problems in deliveries), she will have to face the circumstances with lucidity and not panic, maintaining control of the situation.

Sensitivity and communication skills

The Supply Chain Specialist must have great communication skills and a sensitivity that makes them capable of:
• Train and lead the work group;
• Establish good relationships with customers, colleagues and team members;
• Create an open environment that encourages people to collaborate;
• Analyze and resolve conflicts as they arise;
• Make complex problems understandable to everyone.

Golden Reads

	5 GOLDEN READS FOR SUPPLY CHAIN SPECIALIST	LINK AMAZON
#1	Cohen, S., & Roussel, J. (2013). *Strategic supply chain management: the five disciplines for top performance*. McGraw-Hill Education.	https://www.amazon.com/Strategic-Supply-Chain-Management-Disciplines/dp/007181308X
#2	Sarkar, S. (2017). *The supply chain revolution: innovative sourcing and logistics for a fiercely competitive world.* Amacom.	https://www.amazon.com/Supply-Chain-Revolution-Innovative-Competitive/dp/1400242665
#3	Stanton, D. (2023). *Supply chain management for dummies.* John Wiley & Sons.	https://www.amazon.com/Management-Dummies-Business-Personal-Finance/dp/1394154569
#4	Walden, J. L. (2003). *The Forklifts Have Nothing to Do!: Lessons in Supply Chain Leadership.* iUniverse.	https://www.amazon.com/Forklifts-Have-Nothing-Do-Leadership/dp/0595294960
#5	Decandia, L., Lei, L., Oppenheim, R., & Zhao, Y. (2017). *Managing Supply Chain Operations*. World Scientific Publishing Company.	https://www.amazon.com/Managing-Supply-Chain-Operations-Lei/dp/9813108797

Personal Business Model Canvas

Theatre Director

Author: Georgia Micheli, Kyriakos Lingas (MILITOS)

Theatre Director| Personal Service Model

Who Helps You

Your team (actors, designers, assistant director etc.)

Production companies

Journalists (theatre critics etc.)

Personal contacts (from personal life, education etc.)

What You Do

Orchestrating a theatrical production

Organizing all people involved (artists, technical or creative team etc.)

Who You Are

Creative, Leader, organizational, team player, communicative

Benefits You Offer

Offering new cultural products and innovative ideas

Developing the artistic teams skills, inspiring and guiding them

Increasing revenues of production companies

Roles/Relationships

Teacher, leader, business collaborator, profit maker, actor of social change

Who You Deliver
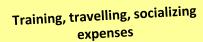
People interested in cultural events, journalists, other artists, producers, theatre professionals

Who You Help

The audience

The team

The producer

Costs and Consequences

Training, travelling, socializing expenses

Stress & financial insecurity

Compensation and Rewards

Self-fulfillment, recognition and prestige

Flexible working hours and independence

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Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Interests

Who you are

The theatre or stage director is **the author of a performance**. As Edward Gordon Craig said once, the director was "a supreme artist, the orchestrator and arbiter of events, the one to monitor the creative process and unify a multitude of theatre discourses".

Responsible for the practical and creative interpretation of a dramatic text or a musical score, the director is **the one behind the "why"** of a production. Why now, why here, why these actors? Why this particular performance matters?

At the same time, directors are administrators, coordinators and leaders of a team that aims to bring to life their **vision**; a vision, that the director needs to breath into his/her collaborators, coordinate its implementation and take responsibility for a collaborative result.

Interests
Who you are

If you want to work as a theatre director, you must be interested in:

The Performing Arts
These are the arts performed in front of a live audience (Drama, Music, Dance etc.) The major requirement for the performing arts to exist is PEOPLE; people who use their bodies, voices, any physical instruments or objects, in order to convey artistic expression.

Drama is fiction represented in a performance. Originated from the Greek word „drao", which means act, drama is one of the major performing arts, bringing on stage important drama texts by ancient or modern playwrights.

Music is a form or art, conveying artistic expression through silence and sound. Many music genres and subgenres have brought music on theatre stages, and especially Opera, combining text (libretto or musical score) with music, has made the presence of a director a requirement for its representation.

Dance is the art of body movement, with or, nowadays, even without music. Contemporary forms of dance focus on expression, rather than a rhythmical movement based on a music piece.
In modern times the boundaries between the performing arts are blurry, since more and more dramatic texts are used by dancers or musicians, creating **new narratives**, such as musicals, physical theatre etc., that combine more than one from the performing arts. This opens new paths for artistic expression and several fields of expertise for directors. So if you find yourself keen on any of the above, definitely directing is an option for you.

Interests
Who you are

Working in less traditional environments

Directors usually work in less traditional environments and do not follow typical working hours. It is not a Monday to Friday, 8-hour job, but, more or less, a 24/7 process, when working on a project. The working environments vary; from theatres to conference rooms, to studios or libraries and from carpentries to dusty storage rooms. Also the production itself might take place in unconventional places, such as festivals, open squares, forests, or even prisons and social care institutions.

Research

A director must delve into a text, whether it is a drama text, or in a literary form. You have to be interested in research, especially in the field of humanities, in order to be able to discover the theoretical background of any text to be presented on stage.

At the same time, you need to be constantly updated on new art forms emerging and current trends in world's theatre scenes.

Leading and Coordinating

Communicating and liaising with all parties involved is a major part of a director's duties. Holding auditions, selecting actors, stage or light designers and all type of collaborators, as well as guiding all of them in order to bring his/her vision to life, is part of the job. Do you like taking responsibility?

Abilities and skills
Who you are

Abilities and Soft Skills

Soft skills are a cluster of personal qualities, habits, attitudes and social graces that help a person perform in any kind of professional role, but also interact with other people and fulfil personal ambitions and roles as well.

Research shows that soft skills play a major role in professional success, especially in professions, such as the one of a theatre director, which usually does not rely mainly on academic studies and hard skills, and requires a combination of different abilities, included, most of the times, in the word **"talent",** a rather vague definition.

So, let's see what "talent" means for a theatre director, in terms of soft skills, which are somehow more measurable and objective.

Abilities and skills
Who you are

Creativity

Creativity is the ability to use imagination in order to think on a new task/project in a new or different way or generate new ideas. The unique perspective is what matters when you are a theatre director. This is what people usually call "talent". Breaking down the creative skill into sub-skills we can further discover that a theatre director needs to be able to:

- Make connections between different ideas, coming up with a new one
- Observe things and making people his/her source of inspiration
- Ask questions, being curious about what lies beneath and beyond the obvious
- Experiment, testing ideas and taking failure as an opportunity to improve.
- Express himself/herself, bringing his/her ideas to life.

Leadership

Leadership does not focus on power and position, rather at the ability of an individual to support and enable others to bring out the best of them.

This is part of a director's "talent" as well. He or she needs to be able to:

- Think of the "big picture", always questioning whether he/she is on the right path
- Persuade others, translate his/her vision to them and guide them to bring to life his/her ideas.
- Be decisive and take responsibility, especially when things go wrong
- Delegate and tap into the expertise of each on of his/her collaborators, allowing for their creativity to flourish, yet setting boundaries.
- Be flexible and adaptable.

Abilities and skills
Who you are

Teamwork

Teamwork is the ability to work efficiently in a group setting, a core skill for theatre directors, who need to be inspired by their team, share their vision with them, respect others' opinion and exchange ideas on a regular basis. A performance is built on the collaborative effort of many artists (director, actors, stage designer, costume designer, music producer, etc.), administrative personnel (producer, production manager etc.), communication team etc. So, it is on the director to be able to:

- Work with each and every one cooperatively
- Contribute with ideas & suggestions
- Communicate effectively
- Tap into the ideas of others and respect their opinion

Organizational skills

A structured way of arranging thoughts, time and tasks is essential for a theatre director. He/she needs to bring to life random ideas formed by research and imagination, so creativity needs to be followed by structure. Thus a theatre director needs to be able to:

- Set goals: measurable objectives are important even in the case of artists
- Plan strategically
- Manage time. Effective planning of rehearsals is essential. A lot of effort (spiritual and physical) is required by the actors, so inefficient time management might lead to tension and disorientation of the team.
- motivate him/herself. Self-motivation is an important element of organizational skills when it comes to the arts. When self-motivated, you are always on step ahead!

Abilities and skills

Who you are

Communication skills

Communication is an essential part of leadership and teamwork. Theatre directors need to be able to communicate well with others for two reasons:

1. They need to be able to put in words their vision and inspire their team
2. They need to be able to coordinate and guide their team towards the accomplishment of a common goal.

Therefore, they need to:

- Know how to speak in different situations;
- Listen actively;
- Be aware of non-verbal communication;
- Find a way to tactfully disagree with others;
- Empathize with the others;
- Be able to resolve a conflict smoothly.

Actors can be emotionally charged when working on a performance, because acting contains an inner process beyond mere consciousness. A director needs to be able to control his/her feelings when communicating/guiding actors and never forget that thins get easily personal during a rehearsal.

Abilities and skills
Who you are

Hard Skills

A degree is not essential to become a theatre director. Directors might acquire the technical knowledge needed through their working experience as actors, assistant directors, producers, stage managers, writers etc.

However, although limited, theatre directing programs in colleges and universities become more and more popular, these days, offering options for theatre directors to focus on the practical and academic aspects of the job. In practice, until now, most of the directors have a degree on a related subject, and then specialize through experience or through postgraduate or doctorate studies. Such related fields are:

- Performing arts, as Konstantin Stanislavski did;
- Theatre studies, like Robert Lepage;
- Drama schools, like Erwin Piscator;
- Languages, like Katie Mitchell;
- Literature, as Ariane Mnouchkine, Samuel Beckett, Ingmar Bergman and many more did.
- Other Humanity-based studies, involving reflection and interpretation, such as history, psychology, philosophy etc., as Vsevolod Meyerhold did, having studied Law.
- Architecture; Robert Wilson, one of the most famous directors worldwide has began his career as an architect, thus introducing a unique, structuralistic form of directing theatre.

Some great directors have emerged from irrelevant fields, such as the construction industry, the medical field (i.e. Anton Chechov) etc., bringing in an interesting perspective.

Abilities and skills
Who you are

Hard skills on the job

A theatre director needs to know about:

- The process of acting: techniques used by the actors to perform;
- Technical issues, the workings of the theatre,(i.e. basic knowledge of lighting design, stage design, costume design etc.);
- How to break down a script, analysing and exploring the content and conducting relevant research;
- How to budget;
- How to translate and interpret a script.

Personality
Who you are

According to Holland, there are 6 personality types: realistic – "the do-er", investigative "the thinker", artistic – "the creator", social – "the helper", enterprising – "the persuader" and conventional – "the organizer". Taking into consideration the variety of tasks carried out by a director, and the variety of skills required, theatre directors have to be more of a multi-dimensional personality type.

- **Artistic:** They need to be original, intuitive and imaginative and enjoy creative activities.
- **Investigative:** At the same time, they have to be analytical, intellectual and observant and enjoy research.
- **Enterprising:** Persuading others, whether collaborators, or spectators is part of the job. They have to be the self confident, persuading type as well.

- **Conventional:** Organizing things, and the sense of responsibility of the conventional type, although not prioritized, are valued elements.
- **Social:** Being humanistic, idealistic, responsible and concerned with the welfare of others is often included in the personality of a theatre director. Human relationships and welfare are at the epicenter of motivation for most of the artists throughout the centuries.
- **Realistic:** less valued for a theatre director. However, it is important, from time-to-time, for a director to be able to approach realistic activities for a production to be implemented efficiently.

Personality

Who you are

Personality traits

The Five-Factor Model gives a fair insight on important personality traits of a theatre director, that can be remembered with the acronym OCEAN:

- **O**penness
- **C**onscientiousness
- **E**xtraversion
- **A**greeableness
- **N**euroticism

Openness, the tendency to appreciate new art, ideas, values etc., is a really appreciated personality trait for a theatre director;

Agreeableness, the tendency to agree and go along with others rather than to assert one's own opinions and choices, as mentioned, is valued by the artistic team.

Extraversion, the tendency to be talkative, sociable and to enjoy others always makes things easier in such a position where communication is a required skill.

Conscientiousness is valued in every profession and the director deals inevitably with time limitations and rules implementation.

Neuroticism, the tendency to frequently experience negative emotions, is highly discouraged in leadership positions. In the arts, things get emotional and neurotic behaviours emerge, something that should be avoided.

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Personal Key Activities

As mentioned, a theatre director is involved in many different activities for the production of a performance, from the initial planning to its premiere.

In particular, common key activities include:

- programming and budgeting;
- adapting a script and, if the play is newly written, working with the writer or collaborating with playwrights;
- breaking down a script, analysing and exploring the content and conducting relevant research;
- translating and interpreting a script or musical score;
- holding auditions for productions, selecting and hiring designers, musicians, etc.;

- managing time and organising people and space;
- attending production meetings with stage & costume designers, guiding them with regards to the visual elements of the performance;
- organising rehearsals, preparing detailed notes for the cast and for the creative and production teams;
- Inspire all other artists involved (musicians, video artists etc.) by his/her vision;
- communicating and liaising with all parties involved (actors, designers, creative team etc.);
- helping to publicize the production by giving interviews and leading discussions.

Key actions
What you do

Different forms of art and theatre exist, and more and more emerge, thus widening the key activities of a theatre director, according to the type of theatre he/she specializes on.

For instance:

Opera director

Opera performances are based on a soundscape, which is quite dominant. Therefore, although a theatre director doesn't need to know music, he/she has to:

- work with the conductor. The maestro or conductor is a special type of collaborator for a director, since he/she oversees the music. This is a key activity for an opera director, since in this collaboration, the delegation of tasks, sometimes, might by blurry.

Physical theatre director

A physical performance does not rely on words, it uses gestures, movements, usage of space, visual or physical metaphors, light, shadow, symbolic objects. Therefore, theatre directors in physical theatre need to:

- Have specific training in physical theatre, including research and practical work with body, space, rhythm, timing, text, group devising etc.

Key actions
What you do

Performance art

In performance art the director uses 4 elements: time, space, the performer's body, or presence in a medium, and a relationship between performer and audience. This requires a closer bond of the director to the visual arts, and thus the director:

- Builds the performance combining all these 4 elements, more like an architect.

Children's theatre

Theatre for children is a special type of performance that engages the director in a whole different process. Although the general activities remain the same, as in any other type of theatre, when directing for children, one needs to:

- Have an understanding of the developmental process
- Process and insight into children's interests, abilities, vocabulary, attention span and humour.
- Must be able to accept the children's cruelty and companion.
- Must read children's books and watch children's programs
- Must watch children at play in order to learn how imaginations flow
- Must ultimately respect the child

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers

Who you help

Your audience is your customer!

It is quite unique the fact that a performance DOES NOT EXIST without spectators. Another product that is not used by customers does not cease to exist in the absence of customers. It remains a product, unused yet existent. **A performance ceases to exist in the absence of spectators**. It is perceived through the eyes of the potential spectators by the director, it is built for them, it starts BEING a performance on the day of its premiere, where the audience is present, and it stops BEING a performance when the last spectator is gone.

Many types of people will attend a performance. As you can see, we do not use the term "watch a performance". We might watch a movie, but

ATTENDING a performance indicates further the participative approach for the theatre spectator, who can be:

- Merely interested in art and cultural events
- A journalist/ critic
- Someone who attends the performance for socializing
- A friend of the cast or the creative team
- Another artist or art student
- A potential "buyer" of the production (cultural organization representative, educational institution representative, another producer etc.)

Customers
Who you help

Apart from the spectators, there is a variety of other people working with theatre director, that "buy" his/her work.

You also sell to producers!
Actually, the producer is an immediate customer of the theatre director: A producer needs to be convinced by the director's ideas, in order to buy them and invest his/her money.
- Is the team selected by the director (actors, designers etc.) the right one to maximize the producer's profit?
- Is the idea commercial enough?
- Which is the targeted audience? Does this audience identify with the producer's target audiences?

Then, at all stages of the theatrical production, the director needs to reassure the producer that the artistic "product" is as agreed.

Your team is your customer as well!
Stakeholders from a theatre directors work is also the rest of his/her team: actors, designers, musicians, technicians, stage manager, all other artists involved, the creative team etc. Your product is your ideas, that are brought to life by your team. These are the ones that need to "buy" your idea, your research and your vision, in order to implement it.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

All stakeholders of a theatre director's job are benefited by theatre director, but also from one another.

Theatre Director

Team

Gets inspired, enhances their creativity and produces a certain artistic result

Audience

Acquires access to new cultural products, broadening their way of thinking and discovering new ways of leisure

Producer

Takes his/her business one step further, gets profits and further establishes the company's brand

Value proposition
Benefits you offer

How you help your team

The director as a teacher: When working with their teams, theatre directors need to guide everyone and let their creativity flourish. Therefore, the theatre director needs to share with the team his/her knowledge around the play and the research that has been conducted, provide actors with the necessary tools (theoretical & practical), throughout the rehearsals, on how to perform the piece, face their insecurities, advise them, answer questions. Trust is a necessary element throughout the rehearsal period and the role of the teacher is the one that can maximize results. This way, the director's team acquires new skills, or develops further the existing ones through practice (hard skills or soft skills), enhances their creativity and becomes a better professional.

The director as a leader: The theatre team gets the opportunity to present their work in front of an audience, guided by one man's vision: the theatre director. Leading them towards a common goal, the director helps them collaborate and be part of a unified effort that brings self-satisfaction, improves their self-confidence and helps them advance in their careers.

Value proposition
Benefits you offer

How you help the producer

The director as a business collaborator: The director implements and coordinates the artistic part of the production, the actual "cultural product" that the producer trades. So the director is the main business collaborator of a producer and brings value to a producer's business.

The director as a profit maker: The director's vision is to be translated into profits: the tickets sold from the production. So, actually, the theatre director is the mediator between the arts and the business world, an important contribution, since the commercial value of a cultural product is what will sustain the producer's company in the first place.

How you help your audience

The director as an indirect entertainer: People go to the theatre for various reasons. One of them is to do something that pleases them. The active and immediate participation of a spectator in a theatre performance offers feelings of joy, or relief, or self-examination, feelings that many people seek for, thus making the director the orchestrator of the entertainment.

The director as an actor of social change: A theatre performance triggers social discourse, sometimes dialogue and potentially social change. Science answers questions, technology solves problems yet art, and especially a theatrical performance through its participative character, poses questions, instead of answering them. Thus, the theatre director's research and creativity translates in a dialogue, influencing his/her audience for a long time after the experience, affecting them consciously and sub-consciously.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
   5. How will you follow-up to make sure Customers are happy?

Channels
How you deliver

The unsung hero!
Rarely people know how a theatre director looks like. Some might have read an interview once and might have seen a picture. Some might have googled the director's name after a performance they liked (or disliked) and have bumped into his/her face, a face they will forget, identified with the face of the protagonists of the play. It is inevitable, the director reaches his/her audience through his work. And slowly the director's name becomes a brand, visualized by his/her shows, engraved into the audience's emotions: the director's name becomes a memory of emotion, that the audience needs to relive – or not.

The mentor
The director needs to become a mentor, when it comes to other artists, in order to gain their trust and collaboration. A director develops his/her team once he/she gains the trust of actors, designers etc. in the way he/she works and with regards to the quality of the artistic result.

The profit maker
The producer needs to be convinced that the cultural product of this particular director is profitable. This depends on how popular the actors that work with him/her are, how popular the director's performances are overall, his/her fame, the types of scripts and the playwrights he/she chooses.
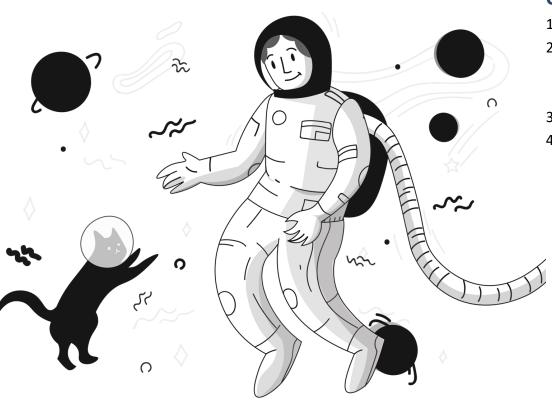
Channels

How you deliver

Therefore, the theatre director develops his/ her channels and improves his/her visibility through:

- Personal contacts
- Networking activities (attending events, meetings with other artists, journalists and anyone that can promote their work)
- Consistent artistic result – developing his personal artistic brand with an on-going presence in culture
- Continuous presence on the press - interviews, advertising of his/her name and work

- Active engagement in social matters - expression of opinion on political matters or on social welfare
- Being active on social networks
- Creating partnerships – with other artists, creative teams, producers
- Effective dissemination of results – ensure that his/her work is disseminated sufficiently (i.e. through the press, online etc.)

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

Auditions

The director carries out auditions for the selection of his closest collaborators: the actors, where he/she needs to evaluate their acting skills, their communication skills and foresee how well they work in a team.

Rehearsals

When rehearsing with the actors, the communication is mainly face-to-face. After covid-19, some videoconferencing rehearsals have been implemented, although this practice has not been considered very effective. Throughout the rehearsals, the interaction is very intimate between the actors and the theatre director, since acting is a sensitive process, and a close relationship between the theatre director and the actors is cultivated.

Meetings

The director conducts meetings in order to select the rest of his/her collaborators (designers, assistant director etc.), as well as in order to build the other elements of the productions (stage design, costume design, lighting design etc.) A theatre director meets also with the communication and the creative team, in order to guide the aesthetic approach of the communication and visual material of the production.

Customer relationships
Roles/Relationships

Dinners
Business meetings are part of the job, yet in a more informal way. Most of the theatre director's networking activities are taking place over dinners or drinks after a show or on a settled date.

Interviews
A theatre director needs to give interviews to the press, either face-to-face with the journalist or written interviews. In this case, he/she is handed over the interview questions.

Written communication
The bigger part of written communication is via email, where the theatre director sends material to the team for study, or arranges meetings and rehearsals. More informal ways of written communication are also popular through the social media chats.

The show
The theatre director's main form of communication is through his/her piece of art: the performance. This is how a director communicates with an audience and, maintaining a consistent quality in his/her services is what grows the customers' base.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

The theatre director is supported by many key collaborators throughout his/ her lifetime.

Education and training

As mentioned, a theatre director might have a bachelor in theatre studies or in a relevant field, or might have evolved to become a theatre director from another role, such as the one of the actor. In this path, many people might contribute, providing advice or opportunities for growth:

- Professors or trainers
- Other directors and other artists
- Intellectuals
- Mentors

Team members

Actors, stage designers, costume designers, lighting designers musicians, music producers, choreographers, video artists and video producers, assistant directors, technicians, stage managers are all collaborators and, actually, the ones implementing the director's vision. Without their support, the performance cannot be brought to life.

Key Partners
Who helps you

Production companies
The producer, the administrative personnel, the communication and the creative team of the production company, all provide administrative support and assist with the promotion of the director's work.

Journalists
The press is one of the main means of communication of a director's work. Journalists, theatre critics, copywriters are important actors, promoting (or not!) a director's work.

Personal life
Artists get inspired by life itself. People in their lives are an essential part of their creativity and their productivity. Theatre directors are called to bring on stage what they feel about the world around them. Both the practical support for this unconventional job and the indirect support, as a source of inspiration, help the director come up with new ideas and implement them.

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Being a theatre director is an important role as you have seen so far. Let's see what can a director earn and what benefits does he/she receive from this job:

Salary

Having to measure up to a demanding profession, we can admit that a theatre director does not get paid as anticipated. The expected salary varies dramatically between different countries:

- In the US the average pay for a theatre director is approximately 54,000$;
- In the UK, 60,000£ , while in subsidized theatres almost 10,000£ ;
- In Germany, the average salary is 66,000 €;
- In Greece, data indicates that the average salary is 16,000 €, in Portugal 18,000 €, in Poland 12,000€, in Spain 26,000€ and in Italy 21,000 €.

Working internationally always improves the theatre director's salary both on national and on international level.

Recognition and prestige

A theatre director is not an actor, remains behind the scenes, yet the position is highly recognized and respected by the art world.

Self-fulfillment

First and foremost, directing is a creative job and offers high levels of self-satisfaction.

Flexible working hours

It is not an 8-hour, 5-day job. Although demanding, it is flexible.

Costs

Costs Include:
1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Time
The role of the theatre director requires continuous need for development. This is a 24/7 process, so the training and working hours cannot be easily calculated. However, the profession offers independence on projects chosen, flexible working hours, and alternative working spaces, making time spent more pleasant. Roughly for a project (usually 3 projects/year) a director needs:
- 2 months research on the upcoming project
- 2-3 months of 5-hour rehearsals with the actors and 2-hour meetings with the other members of the team.

Money
Continuous training required and attendance of cultural events translates in costs.
Undergraduate and postgraduate studies cost is included. International studies, attending seminars and performances internationally and nationally, dinners and networking activities might increase costs as well.

Working at home
A big part of a theatre director's work is taking place at home. Research, online or face-to-face meetings increase utility expenses yet minimize other costs, such as transportation.

Stress
A theatre director is accountable of the success or failure of the theatrical process, a responsibility that creates high levels of stress during the creation and after the presentation of the project.

Financial insecurity
A theatre director is looking for a job 3-4 times a year, so whenever finishing a project, he/she needs to assure the next one. Also, unless working for a public or big private institution, where a steady paycheck and health insurance and retirement plans are provided, financial insecurity is part of the job.

Golden Reads

	5 GOLDEN READS FOR THEATER DIRECTOR	LINK AMAZON
#1	Ball, W. (2003). *Sense of Direction: Some Observations on the Art of Directing*. Drama Publishers/Quite Specific Media.	https://www.amazon.com/Sense-Direction-Some-Observations-Directing/dp/0896760820
#2	DeKoven, L. (2018). *Changing Direction: A Practical Approach to Directing Actors in Film and Theatre*. Routledge.	https://www.amazon.com/Changing-Direction-Practical-Approach-Directing/dp/1138490822
#3	Clurman, H. (1997). *On Directing*. Simon & Schuster.	https://www.amazon.com/Directing-Harold-Clurman/dp/0684826224
#4	Crook, P.B. (2016). *The Art and Practice of Directing for Theatre.* Routledge.	https://www.amazon.com/Art-Practice-Directing-Theatre-ebook/dp/B071VRJC94
#5	Whitmore, J. (1994). *Directing Postmodern Theater: Shaping Signification in Performance.* University of Michigan Press.	https://www.amazon.com/Directing-Postmodern-Theater-Signification-Theater-Theory/dp/0472065572

Personal Business Model Canvas

Tourism and Hospitality Manager

Author: Georgia Micheli, Kyriakos Lingas (MILITOS)

Tourism & Hospitality Manager | Personal Service Model

Who Helps You

Accommodation providers

Travel Agents

Experienced colleagues

What You Do

Monitoring accounts and managing budgets
Overseeing the day-to-day functions of businesses
Ensuring customer satisfaction

Maximising business revenue
Taking part in financial planning
Dealing with customer complaints or queries, Marketing the business for the purpose of attracting tourists

Who You Are

Bachelor degree
Excellent communication capabilities
Easy on languages

Benefits You Offer

Marketing the business for the purpose of attracting tourists

Keeping up-to-date with the emerging industry trends through attending seminars or doing online research

Tourism is one of the fastest-growing industries that help boost economies

Revenue management has played a major role in the growth and development of the hospitality and tourism industry

Roles/Relationships

Leader
problem solver
decision maker

Who You Deliver

Hotel owners, travel agencies, customers of them

Who You Help

Economy

Customers

Costs and Consequences

Competitive atmosphere
Extreme pressure
Workload and hours

educational requirements

Compensation and Rewards

a wide range of career choices
challenging work
Personal development

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Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Interests
Who you are

Tourism and hospitality managers are responsible for managing the day-to-day operations of their organization's tourism services. They oversee all aspects of the business, from marketing and sales to customer service and employee training. Tourism and hospitality managers may also be tasked with developing new products or services for their company. This might include creating new tours or events, developing partnerships with other companies, or even researching new technologies that could improve the experience of their customers.

A tourism manager typically has a wide range of responsibilities, which can include:

- Selecting and hiring staff members based on their qualifications and experience levels
- Maintaining knowledge about current trends in industry practices, laws, regulations, and technology in order to ensure compliance with standards

- Establishing relationships with travel suppliers such as airlines, cruise lines, hotels, car rental agencies, etc.
- Managing daily operations of a hotel, motel, or other hospitality facility, including hiring and training staff, developing budgets, and overseeing marketing efforts
- Managing the marketing and promotion of tourism services offered by an organization
- Reviewing incoming reservations to ensure that they meet company standards and requirements
- Developing strategies to increase tourism to the area through promotion of attractions, accommodations, events, or other offerings
- Planning and preparing budgets for travel and tourism-related businesses such as hotels, resorts, airlines, cruise lines, or amusement parks
- Identifying potential problems within an organization and developing solutions to improve efficiency and customer satisfaction

Abilities and skills
Who you are

Abilities and Soft Skills
In addition to the degree and hard skills, tourism and hospitality managers should have soft skills, such as problem-solving thinking and communication capabilities.

Communication
Tourism managers often communicate with a variety of people, including employees, customers, suppliers and other stakeholders. Effective communication skills can help you convey messages clearly and build trust with others. You can use communication skills to create and maintain relationships with others, share information and feedback and resolve conflicts.

Leadership
Tourism managers often work with a team of employees, so effective leadership skills can be an asset in this profession. As a manager, you may be responsible for delegating tasks, assigning shifts and maintaining a positive work environment. Leadership skills can help you motivate your team and encourage them to work together to achieve company goals.

Problem-solving
Tourism managers are responsible for planning and executing marketing campaigns, events and other activities that encourage people to visit a particular location. This role requires the ability to identify challenges and develop solutions to overcome them. For example, if a tourism manager is planning an event and realizes they don't have enough resources, they may be able to find a solution by reaching out to a colleague or finding a new supplier.

Abilities and skills

Who you are

Abilities and Soft Skills

Organization

Tourism managers often have to manage multiple projects at once, so organizational skills can be very beneficial. You can use organization skills to keep track of multiple tasks, delegate responsibilities to team members and keep records of important information.

Customer service

Customer service skills can help you interact with customers and clients. As a tourism manager, you may be responsible for managing customer inquiries, complaints and other issues. Customer service skills can help you provide quality service to your customers and clients.

Collaboration and Teamwork

Collaboration involves working with several other people to achieve a shared goal. Because hotel management is so broad with many areas of specialization, everyday tasks often require teamwork. Collaboration yields so much success when individuals that make up the team can relate well to one another. When contributing ideas, everyone in a team can collaborate and share their thoughts, suggestions, and opinions. Teamwork involves the division of responsibilities so that each member of a team can concentrate on a specific role. For instance, you likely need to share ideas with other professionals to develop functional and innovative ideas. Teamwork increases efficiency and quality of tasks. It's also key to use interpersonal skills to build strong working relationships with your peers to work together.

Active Listening

Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.

Abilities and skills
Who you are

Hard Skills

A tourism and hospitality manager career can be a great way to combine your love of travel with your passion for business. As a tourism manager, you'll have the opportunity to work in a variety of industries, from hospitality to transportation to entertainment. To get started on your tourism manager career path, it's important to first develop your skills in marketing, sales, and customer service. You should also build up your knowledge of the travel industry by reading industry publications and attending industry events. Additionally, it's important to network with other professionals in the travel industry.

A tourism and hospitality manager should have specific hard skills like an academic program in tourism that offers in depth management understanding, implementation strategies and it equips students to lead business projects in the tourism sector, developing skills that enable them to adapt to this increasingly segmented and competitive market.

It is important to blend the requisite specialist operational knowledge and skills, with advanced managerial competencies, enabling students to progress to higher level studies or directly into the industry.

Ideal for students who aspire to careers in tourism marketing, cruising, international tour operation, resort management or any other aspect of the international tourism industry.

Abilities and skills
Who you are

Education

Tourism managers typically need a minimum of a high school diploma or GED. Many tourism managers choose to pursue a bachelor's degree in hospitality or a related field. These programs typically include courses in hospitality management, marketing, accounting, business and economics. Some tourism managers also choose to pursue a master's degree in hospitality administration.

Training & Experience

Tourism managers typically receive on-the-job training in the form of an internship or entry-level position in the tourism industry. During these training periods, tourism managers learn the skills and knowledge necessary to perform their job duties. They also gain experience working with clients and managing events and tours.

Hard skills on the job

- **Administration and Management:** Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.

- **Administrative:** Knowledge of administrative and office procedures and systems such as word processing, managing files and records, stenography and transcription, designing forms, and workplace terminology.

- **Digital marketing:** Digital marketing helps you to know your customer better; this in turn can be a boon to channelize strategies for meeting targeted goals.

Personality
Who you are

Tourism and hospitality managers score highly on extraversion, meaning that they rely on external stimuli to be happy, such as people or exciting surroundings. They also tend to be curious, creative and optimistic, pay attention to detail, embrace change.

Stress tolerance

The tourism industry is a notoriously demanding industry. Employees need to have the resilience to withstand challenging customers, as well as the rigors of working long shifts, often on their feet, and at the moment, probably in an understaffed establishment. They need to be able to maintain cool heads even in a heated situation. They have to be able to defuse a stressful situation and remain calm and composed while they do it.

Effective Communication

Great communication skills are a must for working in tourism and hospitality sectors. This key characteristic is essential, especially when you deal with people who speak a different language. But communication isn't just about how someone speaks, it's about body language, and a person's general demeanor too. How they handle themselves in a challenging situation; whether they have a warm and welcoming manner. Whether they look you in the eye while they talk. If they speak clearly and enunciate. Succinct communication becomes even more important in today's global business context where language and meaning often become lost in translation.

Personality
Who you are

Quality orientation

Tourism employees need to have high personal standards. In the tourism sector, quality orientation is essential, because is a people facing industry. Everything you do is about ensuring your customers have the best experience, and you do that by keeping quality high. It's your responsibility to know about the necessary rules and regulations which come with delivering high end services.

Multitasking

There are a lot of moving parts in a tourism and hospitality business and if the organization is understaffed, most staff won't just be expected to do one thing at a time. You need to be able to multitask efficiently: deliver a plan, while problem solving, and all with a positive attitude. Not only do tourism managers need to remain calm in the middle of a busy service, but they need to be able to serve customers, answer questions, attend guests and have a smile on their face while they do it. It requires the ability to juggle and complete multiple jobs effectively by making it naturally adept at doing tasks simultaneously, without losing your focus on complex tasks and the quality of work can be affected

Personality

Who you are

Creative problem-solvers

Successful tourism leaders enjoy the challenge of thinking creatively to solve problems. They deal with guests who are visiting or traveling for a variety of purposes, and every guest experience is unique. Every guest's question or situation is different, and the tourism manager must be able to think quickly to have solutions to help each guest.

Global and culturally aware

The words "global" and "culture" came up again and again in our conversations with long-term tourism and hospitality employees. Global views and cultural understanding help a manager communicate with a diverse staff and with guests from all over the world. Understanding cultural-based perceptions and the expectations is a differential advantage when serving and solving guest problems.
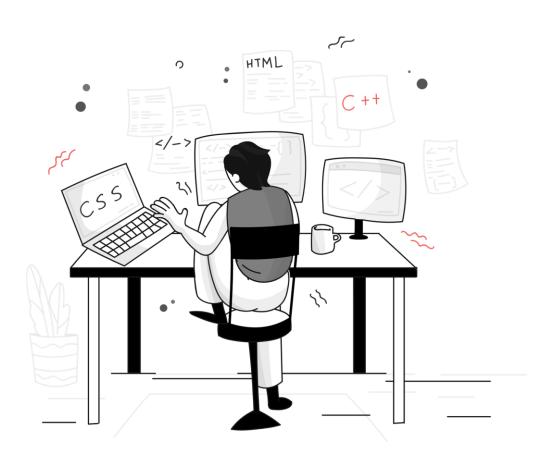
An open and curious mind about culture is a competitive edge for the ambitious hospitality leader. It can lead to a deeper understanding of guests, colleagues and staff.

Flexible

Tourism operations are busy, energetic environments, and conditions that affect the operations can change quickly. Extreme weather, canceled events and other surprises affect guests and their needs, and a successful leader is ready for frequent changes and can adapt quickly. the global pandemic made this prominent. Constantly changing and improving technology also requires flexibility. Managers or employees cannot become so attached to existing systems that they are afraid to learn. Innovative hospitality leaders proactively learn about new technology to improve service and operations.

Personal Key Activities

**Personal Key Activities
include what you do:**

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Personal Key Activities

The precise responsibilities and duties that you must undertake as a tourism manager will depend on the sector of the tourism industry you are employed in and the nature of the business or organisation you work for. Nevertheless, there are some common responsibilities, such as managing budgets, writing reports and supervising staff.

You may also be expected to oversee day-to-day tasks and activities, take responsibility for both hiring and firing staff, provide some level of customer service, and deliver some form of training and/or coaching for employees. It is also likely that you will need to make presentations, attend events and implement strategic changes.

Key actions
What you do

Personal Key Activities

Tourism and hospitality managers direct, administer, and monitor the travel policies, guidelines, and budgets for businesses and travel agencies. When working for travel agencies, they will assist customers with travel plans and itineraries. When working for corporations, they will make business travel arrangements for executives and employees.

Travel Manager Responsibilities:

- Maintaining positive relationships with vendors of direct travel, such as car rentals, hotels, and airlines.
- Negotiating preferred rates with vendors of direct travel.

- Planning travel accommodations, booking flights, hotels, car rentals, and coordinating activities.
- Managing and processing all travel-related documentation, including payments, itineraries, visas, medical, and legal forms.
- Assisting with any travel-related issues that may arise.
- Researching travel deals and evaluating prices and services.
- Arranging travel accommodations for business visitors.
- Creating, optimizing, and monitoring corporate travel policies.
- Preparing travel budget reports.
- Analyzing and preparing reports on travel spend.

Key actions
What you do

Different Management Types Within the Tourism and Hospitality Sector.

There are a number of different types of tourism management to be aware of, with two of the most significant types explained in more depth below:

Hotel Management: Type of tourism and hospitality management that is specifically focused on the day-to-day management of a hotel, motel, hostel, bed and breakfast, or similar form of guest accommodation. In practice, this means overseeing core operations, supervising departments in need, managing employees and finances, and devising strategies.

Revenue management: is a discipline within tourism management that is focused on optimising financial outcomes and, in particular, revenue generation. This involves using available data to make intelligent projections about demand so that the right product can be sold to the right customer, at the right time, for the right price.

Restaurant Management: Within the wider field of tourism and hospitality management, the discipline of restaurant management describes the management of businesses within the restaurant industry or management of restaurants within a larger business. This includes management of day-to-day operations, employees, finances, business strategies, stock, and much more.

Travel agent: to help people plan, choose and arrange their holiday. They will usually work to a budget set out by whoever is planning the holiday. They also offer advice and opinions on where to go and local tourist attractions, events and customs.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

Tourism jobs can be varied, challenging, rewarding and provide excellent long-term prospects, which is why they are highly sought after. Tourism sector is very diverse, consisting of sectors like accommodation, transportation, food and beverages, entertainment and tourism services. This means that there is a wide range of different tourism jobs available, suiting people with a variety of skill sets and personal attributes.

Most of the brand-name travel are owned by a few large groups, made even larger in recent years by high-profile mergers. However, there are a number of independent agencies, some small and some with branches and other specialist agencies. Such travel agents may deal with particular destinations or products, for instance cooking holidays, sports activity breaks or niche locations.

Online travel bookings playing a significant role in the industry and there are opportunities in all aspects of online travel management.

Self-employment is also possible, particularly when providing specialist travel options. The internet has opened up opportunities due to demand from people wanting more tailored holidays at the best prices.

You can also check websites of travel agencies, companies and tour operators.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

Any employer operating within the tourism industry may hire a tourism manager and this would include hotels and other forms of accommodation, along with restaurants, bars, transportation companies and local attractions, such as museums or landmarks. It may also include travel agencies, tour companies and events companies.

In many cases, tourism managers are also associated more directly with local travel and tourism services, helping to attract visitors, manage promotional messaging and more. In these cases, the list of employers is likely to include everything from tourist boards and wildlife trusts, through to local authorities and national parks.

Employers of tourism and hospitality managers range from large, national and international tour operators, to small, specialist tourism companies organising package tours and specialist trips, such as sports tours, music tours and educational tours.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
   5. How will you follow-up to make sure Customers are happy?

Channels

How you deliver

Understand Your Audience

Try to get to know your target audience – your potential new employer. If these are the people, you're marketing yourself to, you'll need to do your market research and understand what they're looking for. Do as much research as you can into organizations of interest and try to establish the skills, knowledge and types of applicants they value highly. If possible, speak to an existing or former employee to get an inside view of the company. If you do reach the interview stage, make sure you fully research the company so you can tailor your answers (and questions) to their unique or recent business activities. Most organizations now disseminate information online in various formats, so information should be easily accessible.

Be there for your "clients"

Once you understand your audience, take time to show up everywhere your ideal clients can be found. Attend trade shows, get sponsored by associations, and join social media platforms.

Understand the search terms, products, and services they use. Engage with these things often and align yourself with where they've placed their attention, so you can be found where they are already looking.

Channels
How you deliver

Discover the distribution channels

There are four types of distribution channels that exist: direct selling, selling through intermediaries, dual distribution, and reverse logistics channels.
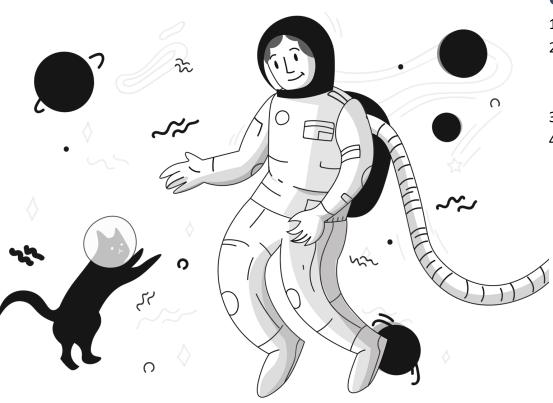
Each of these channels consist of institutions whose goal is to manage the transaction and physical exchange of tourism services.

Distribution channels are all the different ways that your services get delivered to your customers. It can be a direct booking via your website or through third-party resellers within the tourism industry.

Any platform where your services can be turned into a transaction is considered a distribution channel. For many tourism businesses, broadening your distribution channels is a smart way to elevate your tourism marketing strategy. By delivering your products via different streams, you're expanding your reach to a bigger pool of potential customers.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

Setup segmented automations

Customers love personalization, and generic promotions no longer provide credible results. Segmenting your audience with advanced attributes and behavioral activities is the first strategy to implement. Create target groups based on both superficial parameters, like gender and location, and proceed with more advanced criteria. Addressing your customers' pain points separately is what will make your brand stand out and get a competitive advantage.

Control your orders more efficiently

Partnering up with a powerful channel customer engagement solution will give you the flexibility you need to control your orders and your clients more efficiently. All your transactional emails will be automatically set up and will allow you to focus on your marketing strategy uninterrupted. One of the most important customer engagement strategies for tourism is to boost your online presence with an easy-to-use software and solidify your marketing plans.

Keep in touch with your customers

Social media accounts (personal and professional) should be updated on a daily basis, as your loyal followers need to be informed of every offer. Covid-19 may have put our traveling plans on hold, but the need for an escape is still present. Schedule your online posts and enrich them with videos, reviews, photos, and inspiring content. Apart from social media, send personalized messages, via email, SMS, or push notifications to your customers with offers based on their previous activities. Note that you need to separate your segments and use appropriate channels for each of them.

Customer relationships
Roles/Relationships

Create promotional emails with limited-time offers

Promotional emails increase brand awareness and customer loyalty while generating revenue. Your clients need to be informed about every possible promotional campaign, so advertise booking arrangements with discounts, in-house events, or all-inclusive deals.

Join forces with your social media department and share your content via high-quality visuals and appealing CTAs. However, make sure to keep the generic emails to a minimum, as it is best to communicate with your contacts with a more personalized touch.

Keys to good customer service:

Understand customer need.
Make him feel special or important customer for the company.
Deal with him patiently.

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

Key Partners of travel and hospitality managers would be those that provides travel and tourism related services to the public on behalf of suppliers such as activities, airlines, car rentals, cruise lines, hotels, railways, travel insurance, and package tours.

Other departments that support a tourism and hospitality manager

- Accommodation providers;
- Food & Beverage;
- Travel & Transportation Agents;
- Meetings and Events;
- Entertainment .

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

A career in tourism management allows you to build a better future for you, and for the world!
Why is that? The benefits and revenue for being a tourism managerare various and really significant:

Wide range of career choices

Generally, the role of tourism manager offers a lot of scope for variety and progression. In larger companies, this may mean moving up the management ladder to area manager roles or to another specific area of the business such as PR, human resources or marketing. Typically, as a new entrant, you'll need to gain two to three years' experience as a sales consultant before being able to apply for a team leader position, and a further two to three years' experience before applying for branch management roles. You may need to relocate to gain promotion if working for a larger company, or move between companies if you're working for a smaller independent company. By specialising opportunities may arise to relocate or spend time working abroad where you could forge links with travel partners overseas. Alternatively, you may move into education tourism. The experience you gain manager opens up opportunities in the wider tourism industry including hotels and leisure facilities, airlines and cruise ships.

Revenue
What you get

Salary

Starting salaries range from Euro13,000 to euro 20,000, depending on the company's size, location and market. With experience, salaries can rise to around 25,000. Salaries vary greatly between agencies, with larger chains normally paying higher rates. You can enhance your earnings through various incentives and performance bonuses. Concessions for personal holidays and travel are also common.

Challenging work

Tourism and Hospitality managers lead on and develop the blue economy sector, so you'll be at the heart of the process. Tourism managers work in a variety of settings, including hotels, resorts, restaurants, spas, and tour companies. They may also work for government agencies or nonprofit organizations that promote tourism. Many tourism managers work full time, and some work more than 40 hours per week. They may work evenings, weekends, and holidays to accommodate the schedules of their guests and customers. Some tourism managers travel frequently to attend conferences and meetings or to inspect facilities.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Commuting, travel, or socializing expenses
   - Vehicles, tools, or special clothing
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Competitive atmosphere
It is difficult for new graduates of tourism and hospitality management to get placed in good job unless there are some very good colleges or have great skills. The best paying jobs in the field often come from large or multinational corporations whose working environments have become increasingly competitive due to recent economic conditions.

Fresh graduates start out as low as assistants and undergo thorough training and evaluation for a year or two after which a few get promoted. Promotions are heavily performance-based. As a tourism manager gets bumped up to a higher-level competition gets more serious. Also, it is very well known that good companies don't like to recruit unexperienced staff and prefer the experienced ones.

Educational requirements
The minimum requirement for entering the field is a bachelor degree or a closely related subject course. These would help a fresh graduate get a job, but may not be sufficient to guarantee a career. Companies encourage their staff to take Graduate Studies. This is done over and above the necessary short courses, seminars conferences and development classes

Costs
What you give

Extreme pressure

The tourism industry is a notoriously demanding industry. Tourism managers need to have the resilience to withstand challenging customers, as well as the rigors of working long shifts, often on their feet, and at the moment, probably in an understaffed establishment. They need to be able to maintain cool heads even in a heated situation. They have to be able to defuse a stressful situation and remain calm and composed while they do it.

Workload and hours

Another downside a tourism manager might face is the unpredictability of the workload. It is known that the spring and summer period are really heavy and in general seasoning periods are more demanding. one week while the next week sees him working on another project. A more dynamic person may find this interesting but for someone who prefers a routine workload may find it difficult to handle.

Golden Reads

	5 GOLDEN READS FOR TOURISM AND HOSPITALITY MANAGER	LINK AMAZON
#1	Page, S. J. (2019). *Tourism Management*. Routledge.	https://www.amazon.com/Tourism-Management-Stephen-J-Page/dp/1138391166
#2	Inkson, C., Minnaert, L. (2022). *Tourism Management: An Introduction.* SAGE.	https://www.amazon.com/Tourism-Management-Introduction-Clare-Inkson/dp/1529758467
#3	Buhalis, D., Costa, C. (2006). *Tourism Management Dynamics.* Routledge.	https://www.amazon.com/Tourism-Management-Dynamics-management-Futures/dp/0750663782
#4	Mariani, M., Buhalis, D., Czakon, W., Vitouladiti, O. (2015). *Tourism Management, Marketing, and Development: Performance, Strategies, and Sustainability*. Palgrave Macmillan.	https://www.amazon.com/Tourism-Management-Marketing-Development-Sustainability/dp/1137405651
#5	Lee, K. (2016). *Strategic Winery Tourism and Management: Building competitive winery tourism and winery management strategy*. Apple Academic Press.	https://www.amazon.com/Strategic-Winery-Tourism-Management-Competitive/dp/1926895681

Personal Business Model Canvas

Translator

Author: Georgia Micheli, Kyriakos Lingas (MILITOS)

тranslator | Personal Service Model

Who Helps You

A dedicated team (PM, proofreaders, editors, copiers etc.)

Translation companies, agencies

Personal contacts (from personal life, education etc.)

What You Do

take written materials in one language and reproduce them in another

Organizing all people involved

Who You Are

Creative, organizational, team player, communicative

Benefits You Offer

enabling the public to read the translated version as if it were the original.

Rendering spoken ideas accurately, quickly, and clearly

Manage work schedules to meet deadlines

Roles/Relationships

leader, business collaborator, profit maker

Who You Deliver

People in need of texts in another language

Who You Help

Readers

The team

A company, an agency
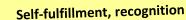
Costs and Consequences

Constant Training, Softwares

Stress & financial insecurity

Compensation and Rewards

Self-fulfillment, recognition

Flexible working hours and independence

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Personal Key Resources

Personal Key Resources include who you are:

1. your interests,
2. abilities and skills, and
3. personality, and
4. what you have: knowledge, experience, personal and professional contacts, and other tangible and intangible resources or assets.

Interests
Who you are

Translators aid communication by converting written information from one language into another. The goal of a translator is to enable the public to read the translation as if it were the original.

To do that, the translator must be able to write sentences that flow as well as the original, while keeping ideas and facts from the original source accurate. They need to consider any cultural references, including slang, and other expressions that do not translate literally. Translators must read the original language fluently but may not need to speak it fluently. They usually translate only into their native language. Nearly all translation work is done on a computer, and translators receive and submit most assignments electronically. Translations often go through several revisions before becoming final.

Translators typically do the following:
- Convert concepts in the source language to equivalent concepts in the target language
- Speak, read, and write fluently in at least two languages, including English and one or more others
- Relay style and tone
- Manage work schedules to meet deadlines
- Render spoken ideas accurately, quickly, and clearly

Interests
Who you are

A translator gets hired to take written materials in one language and reproduce them in another. Their goal is to create a translation of the text that is accurate and reads the same way as the original text. This involves maintaining a document's style, structure and tone and interpreting cultural references, expressions and slang. Translators often read a work in a language they speak fluently and convert it into their native language.

Translator job requirements might include:
- Reading materials;
- Writing and proofreading;
- Translating text from one language to another;
- Maintaining a text's meaning, accuracy and tone;
- Making multiple rounds of revisions to translated text;
- Editing computer-translated text;
- Researching technical or industry terminology;
- Checking a translation's quality and accuracy;

- Creating subtitles for presentations or videos;
- Consulting with industry experts;
- Meeting with clients to determine their needs and make sure the finished work meets those needs;
- Giving clients estimates of a translation project cost and timeline;
- Staying up to date on translation tools and techniques;
- Translators typically work in the business, education, health, legal, literary, science and technical industries. The texts they convert can include books, articles, published research, legal documents and any other written material that needs translating;
- Using online translation and computer-assisted translation tools.

Interests
Who you are

Also a translator job requirements includes:

Research

A translator must read a text, whether it is a medical text, or a law text. You have to be interested in research, in various fields, in order to be able to discover the background of any text to be translated into another language. At the same time, you need to be constantly updated on new emerging and current trends.

Leading and Coordinating

Communicating and liaising with all parties involved is a major part of a translator's duties. Holding meetings, selecting collaborators, as well as guiding all of them in order to deliver results, is part of the job. You have to like taking responsibilities.

Abilities and skills
Who you are

Abilities and Soft Skills

All it takes to become a successful translator is mastering two languages and being able to replace words from one of those languages with words from the other, right? In fact, there are plenty more skills to master if you want to be the kind of translator who gets called first.

There are obvious skills involved in being a world-class translator – an excellent command of two languages, extensive cultural knowledge in both languages, basic software skills, and a knowledge of CAT tools. This raises a question – if these skills are so obviously necessary, why do some freelancers stay busy while others are always waiting for their phones to ring? In large part, the difference comes down to soft skills (or a lack thereof).

Scientists from Harvard, Stanford, and the Carnegie Endowment have found that "flexible skills" represent 85% of a person's professional success, while "hard skills" make up only 15%.

Soft skills indicate an individual's ability to work with others, grow within a company, build relationships, and solve problems. Listing soft skills on a CV, demonstrating them in an interview, and developing them in the workplace can support a translator's career and open new doors. With that in mind, here are the most in-demand soft skills you can develop to support your career.

Abilities and skills
Who you are

Attention to detail

Thinking through the fine points of a translation project or task can help you visualize the big picture and have a better idea of what the result might look like. Maintaining attention to detail also helps increase productivity and reduces errors.

Organizational skills

Considering that these are the abilities that let a translator stay focused on different tasks and use their time, energy, strength, mental capacity, and physical space as effectively as possible, it's easy to see why translation agencies value them so highly.

Self-motivation

Self-motivation drives people to keep going even in the face of setbacks, take up opportunities, and show commitment to what they want to achieve. It's vital to any self-employed individual, including translators.

Abilities and skills
Who you are

Flexibility

Flexibility is an important soft skill, since it demonstrates an ability and willingness to embrace new tasks and new challenges calmly and without fuss. A flexible translator is willing to help out wherever they're needed, take on extra responsibilities, and adapt quickly when plans change. Employers in every industry are looking for candidates who can show a willing and upbeat attitude and who are unfazed by change, and the localization industry is no different.

Dependability

Simply put, being dependable means that you do what you say you will, when you say you will. You can be trusted to complete any task, and you will do it well. In a world of continuous change, staying dependable means managing expectations and always being accountable.

Integrity

Do your job with integrity, and you also exemplify honesty, independence, approachability, and pride in your work – all traits that help you stand out from the competition.

Abilities and skills
Who you are

It is easy to focus on just being a good translator, but if we can also become a better communicator, you will achieve a higher degree of like-know and trust among our clients and prospects, and ultimately become more successful. Efficient and constant communication is important as it helps the translator to do the work faster and better.

Communication skills

Communication is an essential part of leadership and teamwork.

1. Adapting your communication style to the client
2. Practice the art of listening instead of thinking ahead
3. It is important to get everything in writing
4. Anticipating questions and clarifying
5. Being available and responding quickly
6. Communicating online
7. Find a way to tactfully disagree with others
8. Empathize with the others
9. Be able to resolve a conflict smoothly

Abilities and skills
Who you are

Hard Skills
Requirements for translators

Most individuals who pursue translator careers speak at least two languages fluently. Clients and employers typically look for translators with a bachelor's degree, experience converting texts to other languages and the communication and interpersonal skills to succeed in this field. Translation job requirements include:

Education

A translator's education often starts in high school, where they take and excel in foreign language classes.

Most translators earn their bachelor's degree in a subject such as translation, interpreting, international studies, English or a foreign language. Students who want to specialize in translating certain types of documents might also study medicine, engineering, business or law.

While you can find translation work without a degree—particularly if you speak multiple native languages—a bachelor's can significantly improve your chances of getting hired and advancing in your career. Most government and international organizations, require translators to have college degrees.

Abilities and skills
Who you are

Hard Skills
Advanced language knowledge

You can't translate something unless you understand it. And if you don't understand the text fully, you risk misinterpreting it and delivering a translation that's not completely accurate. So good translators need to understand all meaning – including all the subtle nuances implied in the text.

That level of understanding requires advanced, near native level, knowledge of your source language. Nothing less will do.

How to gain advanced language knowledge

- Study – do a degree or other course in your language
- Read widely
- Be an avid consumer of source language media
- Immerse yourself in the culture – visit source-language countries regularly if you live elsewhere
- Keep it up! Language is constantly changing, so it's an on-going process, not a target to reach then relax

Abilities and skills
Who you are

Hard Skills
Excellent writing skills

To be a good translator you must be a very good, and not merely adequate, writer in your target language.

You must have a way with words, the ability to write with flair. And you'll likely need to do that across a variety of text styles – promotional and marketing, formal/legal, casual, technical, etc. To some extent you either have excellent writing ability and expression or you don't.

But it's also a skill you can hone and improve with experience and application.

How to improve your translator writing skills
- Take a writing course
- Collaborate with your peers – see how they translate things and the wording and expression they use
- Read your translations aloud to pick up any unnatural phrasing, and spend time refining and polishing your wording
- Read widely – it'll extend your vocabulary
- Note down wording you come across that you really like, and add it to your repertoire

Abilities and skills
Who you are

In-depth cultural knowledge

Good translators have a deep understanding of both source and target cultures. That's general cultural knowledge like values systems and how people view the world. And culture-specific aspects like pastimes, customs, etc. You'll often need cultural knowledge to grasp the significance or implication of text you're translating. And understanding the differences between your source and target language cultures will alert you to text that won't work well or will have reduced impact when translated.

How to extend your cultural knowledge

- Spend time in both target and source culture countries
- Consume media in both languages
- Attend cultural events
- Research aspects of the culture you haven't personally experienced

Abilities and skills
Who you are

Sound research skills

Translators are always researching things – wording, meanings, vocab, jargon, background info. The more efficiently you can do it the better.

How to refine your translation research skills

- Learn the tricks to refining Google searches
- See what your peers do
- Find and bookmark your most useful reference sources
- Ask on translator forums
- Best practice translation and review processes
- Translation is mentally challenging, and it's dead easy for the odd shortcoming to slip through.
- A little inaccuracy here, less than ideal wording there.

Abilities and skills
Who you are

Sound translation judgement

Good translators make consistently good translation decisions. On vocabulary and structures to use, when to be more literal / freer, what and how much to research, etc. Much of this is instinctive, but with the right effort any translator can markedly improve this basic skill.

How to improve your translation judgement

- Study translation – choose a course that includes tons of translation practice with constructive tutor feedback
- Collaborate with a colleague – critique each other's work and learn from each other
- Seek out a mentor – an accomplished translator willing to give feedback and help you hone your translation skills
- Self-critique your work. Revisit earlier translations and see how you could improve them
- Gain experience! Generally, the more you translate the better you'll get – especially if you're receiving constructive feedback

Abilities and skills
Who you are

Computing and CAT (Computer Assisted Translation) skills

You'll need to have good command of commonly used office programs – Word, Excel, PowerPoint, etc. And you should be an expert on your chosen TM software.

CAT tools are software applications that support the translation of text from one language to another. More specifically, CAT tools for translation are used for submitting, editing, managing, and storing translations.
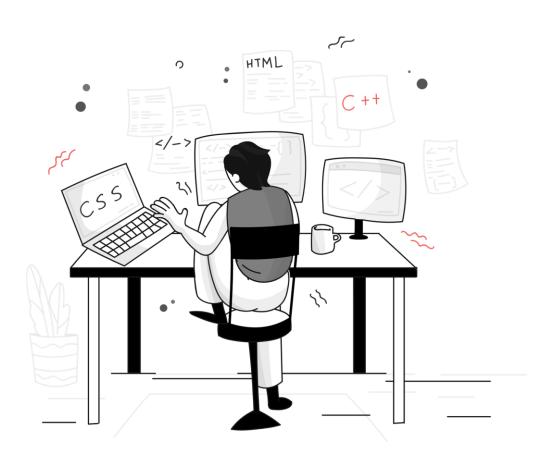
How to improve your CAT skills
- Take advantage of Microsoft's training videos, especially those for Word
- Watch on-line tutorials and YouTube how-to's

- Search for solutions to specific problems you have or areas where you're a little weak
- Do a course
- Compare notes with your colleagues for TM productivity tips

Famous CAT tools (SDL Trados Studio, Wordfast Pro, MemoQ, Memsource)

Personal Key Activities

Personal Key Activities include what you do:

1. driven by Key Resources,
2. evolves out of who you are,
3. tasks performed regularly at work
4. physical or mental
5. done on behalf of Customers

Key actions
What you do

Personal Key Activities

At first glance, the task of a translator seems simple: shuttle information from one language to another. It's a lot more complicated than that. Translation is one of the most important tools for global communication, but much of the labor behind it is invisible to the average person. When you look at the various things a translator actually does, you'll quickly realize how vast their jurisdiction is, and how important translators are for the ability of our world to function.

Here, we'll cover the different types of translators and the process required to become one. In particular, common key activities include:

- reading documents;
- writing and editing copy;
- using software and bespoke applications to upload content, if required by a client;
- preparing summaries;
- consulting with experts in a specialist field, if required;
- developing contacts and building relationships with clients.

Some translators may specialise in a particular type of work or in a particular industry sector: for example, specialising in translating technical, legal, medical or financial documents.

Depending on the employer, career progression can come from taking on a project management or team coordination role.

Key actions

What you do

Types of translation

You can translate a variety of content, including:

- commercial
- educational
- financial
- legal
- marketing and advertising
- medical
- political
- scientific
- technical

You could also work as a literary translator, translating works of fiction, or as a subtitler, translating dialogue on films, TV programmes and video games.

Key actions
What you do

Types of Translators

Literary Translators

Literary translators are possibly the first type you think of when you hear the word "translator." What sets this group apart is that they work on artistic writing, whether that's poetry, prose, fiction, nonfiction or anything else. The job of a literary translator is to convey not just the content of the original text they're working with, but also the form.This kind of translation is regarded as an artistic form in its own right. That's why a single text can create several different translations, and why people can debate over which translation of, say, These types of translators often tend to be writers themselves. While not a requirement, being a good writer in the target language is helpful. Some work closely with the author of the original text and others work entirely separately (which is always the case if the author is dead). While it's hard to make any overarching statements about literary translators, they all contribute in various ways to the larger literary world.

Informative Translators

Informative translators differ from literary ones in that the form of the content doesn't matter as much. Instead, the most important thing is making sure that the content is as clear as possible. While literary translation is more talked about, informative translation is far more common. This category is broad, and there are many other types of translators that fit within it. Often, a translator will have a specialization that they work in: business, law, medicine, finance, technical or something else. These require extra training because they have a vocabulary that a layperson might not encounter on a daily basis. There are many different ways an informative translator might work. There are some regular, nine-to-five jobs in which a person translates for a specific company or institution. These tend to be jobs in the more specialized fields of translation, like legal translators who work for a single law office. It's just as possible, however, to work for an agency that provides translations for many different clients, or even freelance.

Customers

Customers
Include who you help:

1. those who pay to receive a benefit
2. depend on your help to get jobs done (your organization)
3. those you report to
4. other internal customers (projects leaders, team members)
5. Your organization customers, business partners, communities

Customers
Who you help

Any individual or business that's willing to relocate or expand is in need of professional translation services. Some people need to translate medical documents every month, while others need daily translations of texts or websites.

Typical employers/customers of translators
- Translation companies/agencies
- Commercial and industrial organisations, such as manufacturers
- Local, national and international governments and international bodies such as the United Nations

- Other public sector bodies, such as the police.
- Many translators are freelancers or work for agencies;
- Vacancies are typically advertised by recruitment agencies, careers services and jobs boards, as well as on the websites and in the publications of relevant professional bodies, Posts within government and international bodies are often advertised directly on their websites.

Value proposition

The most important concept to think about career

Central to defining Personal Business Model

Value proposition Include:
1. how you help other people to get their jobs done
2. benefits customers gain as a result of my job done
3. how your Key Activities result in value provided

Value proposition
Benefits you offer

The role of the translator in the era of globalized media and new media is what it has always been.

In the age of global media, visual information in particular has proliferated to unprecedented levels. The translator's role is to help transfer of information. To provide interpretations that place events in a larger context and relate them to each other so that the audience can form a complete picture of the universe and their place in it.

Therefore, even in the era of unrestrained information, the translator helps the orderly functioning of the state, the society, the highlighting of the characteristics of all social groups and finally, helps the person himself to develop, to evolve, to act, to decide.

Channels

Channels Include:

1. how customers know you
2. how you deliver products/value
3. answer questions:
   1. How will potential Customers discover how you can help them?
   2. How will they decide whether to buy your service?
   3. How will they buy it?
   4. How will you deliver what Customers buy?
   5. How will you follow-up to make sure Customers are happy?

Channels

How you deliver

The profession of the translator includes publicity and recognition. You too can promote and display what interests you in basic ways.

Personal Social media

Everyone can promote their work through these networks. You can shape your professional image on social networks. and to republish the projects you have undertaken

Personal Website

Nowadays is easy to create a personal website where you can upload your work. Don't forget to mention every time the media on which your text, video or podcast was hosted.

Platforms Presence

Translation is a profession that has a history of freelancing, long before the internet enabled workers across a huge range of other sectors to start selling their skills this way. The rise of online marketplace platforms has given freelance translators an easy way to advertise their skills. It has also provided companies with an easy means of finding the perfect translator to meet their requirements, from the language pairing on offer to any specialist skills and knowledge that they might need. (Tomedes, ProZ, Upwork etc)

Channels
How you deliver

The Agency Translation

A translation agency is a great way to start getting translation work. It requires less business knowledge, so you can start working as soon as your translation skills are good enough. Working with direct clients isn't for every translator. It requires a fine-tuned sense of business, customer service, marketing and project management. Some translators prefer to just focus on what they do best: translate.
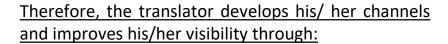
If you can't be bothered to craft the perfect email and sales funnel to onboard direct clients, or simply don't want to be constantly networking and reaching out to brands and businesses, then translation agencies may be right for you.

I have a mix of both kinds of clients, and that suits me just fine.

When working with agency clients, you'll usually find:
– They are easier to find and contact
– They understand the translation process
But you will also encounter that:
– You have less bargaining power (they've often already negotiated rates with their clients)
– Many impose their own terms and conditions, including payment terms (should/can be negotiated)

Channels
How you deliver

Therefore, the translator develops his/ her channels and improves his/her visibility through:
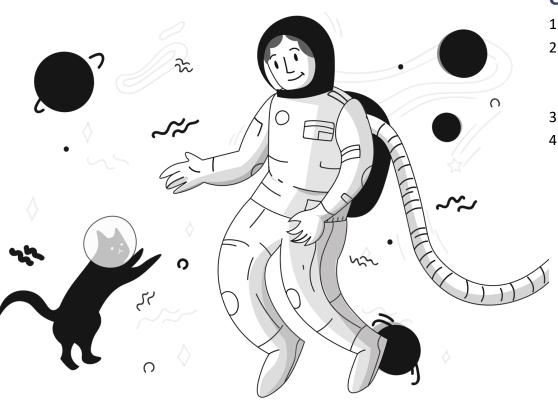
- Personal contacts,
- Consistent translating results;
- Being active on social networks;
- Effective dissemination of results – ensure that his/her work is disseminated sufficiently (i.e. through the press, online etc.);
- Work your craft (always try to do your best and keep learning and asking for feedback);
- Offline networking;
- Professional association directories;
- Social media marketing;
- Content marketing;
- ProZ Blueboard;
- Cold email prospecting.

Customer relationships

Customer relationships Include:

1. ways you interact with customers
2. It may be:
    1. Face-to-face interaction
    2. "Hands-off" – written communication (e.g.. e-mail)
3. single transaction / ongoing services
4. growing customers base (acquisition) / satisfying existing customers (retention)

Customer relationships
Roles/Relationships

A lot of **freelance translators** receive their main income through translation agencies. In this case client communication is pretty minimal. Agree on a price, accept the translation job, possibly send in some queries, send in the translated text plus your invoice. What does a good translator do in this case? He finds a way of communicating with his agency, informing them about the progress and/or possible restrains.

For an **independent translator** working for direct customers, client communication is a lot more critical for success.
•You need to negotiate a mutually acceptable deadline and price.
•You need to communicate with your client to gather important information for the translation job in hand: finding out why he wants the translation done, who it is intended for, is there a house style, does he know of target language competitors who sell the same product/service etc., sending queries regarding the document in hand etc.
•You may have to chase up an outstanding invoice.
•You may run into trouble (e.g. you suddenly fall ill, so you have trouble meeting the deadline).In this case it is vital you talk to your client. More often than not issues can be resolved in mutual agreement. This will keep your client happy, so they will hopefully return with future jobs.

Effective client communication will make your job easier and will help you retain clients: if you don't know whether the text you are translating is intended for a trade conference or a group of laymen who know nothing about the product or concept to be sold, how can you possibly get the translation right?

Key Partners

Key Partners Include:

1. all who supports you
2. all helps you do your job successfully
3. all that provide:
   - advice,
   - motivation
   - opportunities for growth
   - specific resources needed
4. they may be:
   - Colleagues
   - Mentors from work
   - Members of professional network
   - Professional advisers
   - Family members
   - FriendS

Key Partners
Who helps you

The translators are supported by many key collaborators throughout their career:

Translations companies
A translation company, the administrative personnel, the communication and the creative team of the company, all provide administrative support and assist with the promotion of the translator's work.

Building a Shared Community of Practice
Online discussion forums provide a space for sharing ideas and building a helping network around translators own interests, concerns, and experiences.
•Recognize and reinforce contributions, identify areas of agreement and disagreement, and seek a way to achieve consensus, learning, and understanding.
•Evaluate the effectiveness of the discussion process

Peer Review
Peer review and mentoring activities are very effective in improving translation strategies and techniques. They allow translators to reflect on their own translation process, learn different ways to solve translation problems, participate in the creation of shared knowledge, and as a result, create a community of practice.

Mentor: Mentors are the people we look to when we need advice, guidance or just a sounding board for our ideas and goals. The mentor acts as an adviser to the mentee on aspects of life as a professional translator, such as time management, meeting deadlines, managing finances and understanding contracts, and as an advocate for their mentee with publishers in search of literary translators. The mentor will be a professional literary translator but may not translate from the language supported in the mentorship. They tend to be people we look up to, because they've accomplished something we feel to be noteworthy.

Revenue and benefits

Revenue and benefits Include:

1. All income sources
   - salary,
   - contractor or professional fees,
   - stock options,
   - royalties,
   - health insurance,
   - retirement packages,
   - tuition assistance.
2. Soft benefits
   - increased satisfaction,
   - recognition,
   - and social contribution.

Revenue
What you get

Translators do not have the highest-paying employment. The world is a global village, and one approach to make boundaries more permeable is to use cross-border translation languages. The pay for translation tasks varies based on a number of criteria. Language pairings, the kind of translation service, translation speed, the location of the translators, and the type of information being translated all have a major influence on the project's compensation.

Which translation jobs offer the best salaries?

• Literary translators, who make an average of $51,000 per year, are the highest paid of the many categories of translation services. Most likely, this is due to the fact that literature is regarded the most difficult subject to rewrite in a new language. Poetry, lengthy novels, journals, and other kinds of literature are all translated by literary translators. Their goal is to break down linguistic barriers and make art accessible to a global audience.

• Medical and legal translations are 2 more categories of translations that pay well owing to the high degree of accuracy necessary. In general, translators in this sector are subject matter experts in related fields who have a thorough understanding of specialized terminology and laws.

• Because of the growing need for localization services across different industries, jobs linked to localization pay very well. As more businesses go worldwide, language specialists and localization engineers are needed to help them maintain their global market share. The majority of these businesses are ready to pay affordable fees in exchange for high-quality translation.

Revenue
What you get

The revenues from a translation depends on various factors, the largest ones being the length of the text to be translated, i.e. the number of words, and the linguistic combination. The rarer the language combination, the higher the translation rate: for example, a translation from English to Japanese will cost much more than a translation from English to Italian, because there are less translators available for this language combination and the cost of living in Japan is much higher than in Italy.

In addition to these two variables, the price of a translation can vary substantially according to the subject. The more specific and technical the terminology in a translation, the higher the translation rates. For example, the translation of an article on the operation of nuclear reactors will cost more than the translation of a brochure on the best restaurants in New York.

Lastly, prices for a translation change if it requires particular formatting work, an urgent delivery date, or if it is a specific type of translation (sworn translation, proofreading previously translated material, certified translation, and more).

Translated offers an average price of 0.10 euros per word. The translation of a standard page costs on average 10-15 euro, considering an average of 250 words per page, or 1,500 characters including spaces.

Revenue
What you get

Salary

In Greece in particular a translator working in an agency based on the 2021 wages lists can be paid from 689,94 to 1500 euro per month.

As a freelancers things are different. The final payment is defined by the linguistic combination and the charge refers to the total pages or the total words delivered.

Indicatively the prices in Greece per language

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Language	Not specialized text	Specialized text
English	10,0 euro per page	13
French	14	17
German	13	16
Spanish	14	17
italian	13	16

Recognition and prestige

A translator, remains behind the scenes, yet the position is highly recognized and respected by the literature world.

Self-fulfillment

First and foremost, translation is a creative job and offers high levels of self-satisfaction.

Flexible working hours

It is not an 8-hour, 5-day job. Although demanding, it is flexible.

Costs

Costs Include:

1. What you give:
   - time
   - energy
   - Money
2. Hard costs
   - Training or subscription fees
   - Softwares
   - Internet, telephone, transportation, or utility expenses you bear while working at home or at client sites

Costs
What you give

Time

In the world of translation, urgencies are the norm. People often realize they need a translation done at the last minute. Picture someone at an airport in another country unable to board a plane because the customs agent cannot read their travel visa. These assignments often a premium, but lead to a lot of stress as well.

Money

Continuous training required and attendance of cultural events translates in costs.
Undergraduate and postgraduate studies cost is included. International studies, attending seminars and performances internationally and nationally, dinners and networking activities might increase costs as well.

Working at home

A big part of a translators's work is taking place at home. Research, online or face-to-face meetings increase utility expenses yet minimize other costs, such as transportation.

Costs
What you give

Stress
A translator is accountable of the success or failure of the theatrical process, a responsibility that creates high levels of stress during the creation and after the presentation of the project.

Financial insecurity
The freedom and flexibility of becoming a freelance translator isn't without it's drawbacks. There is no guarantee of work. You have to work hard to maintain a good reputation, and impress the agency that you work with. There's also the possibility that work in your language or industries of specialization won't be in high demand each month.

Many jobs will be lost due to machine learning in this industry
Artificial intelligence and machine learning will also make many translators obsolete in the future.

In a few years, machines will likely be intelligent enough to replace interpreters and to do their work.

Since machines are usually cheaper and more reliable than humans, you will have a hard time competing in this environment as a translator.

Golden Reads

	5 GOLDEN READS FOR TRANSLATOR	LINK AMAZON
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