



Revision to August 2023



Contents of the Digital Transformation Kit for SMEs:

Module 1: Introduction

It includes information on what is the digital kit and how it can be used to support Micro and Small Enterprises to make their digital transformation process, through a practical digital guide to project themselves digitally to increase their sales, internationalize and access new markets.

Module 2: Digital presence

It includes information about the digital media presence of a business, person, or brand and how to achieve greater impact.

Module 3: Online commerce

It includes information about online commerce, benefits and how to set it up.

Module 4: Online marketing

It includes information about online marketing, benefits and how to put together a plan to support it.

Module 5: Online security

It includes information about online security, challenges and how to put together a plan to support the topic.

Module 6: Complementary topics

It includes information about topics that support the digital transformation such as financial issues, customer management, supplier management, inventory management, among others.

Module 7: Closing

Acknowledgements, disclaimer and suggested next steps.



Module 1: Introduction

A **digital kit** is a set of tools, tips and resources that aim to support businesses in using the advantages of digital technologies to enhance their operations.

This kit seeks to support businesses in their digital transformation process to evolve and improve with the support of technology. The aim is to support businesses to save time and costs, and to improve their productivity and the management of their customers, suppliers, and their entire ecosystem.

But first, we must define what digital technology means. The word technology, according to its etymology, is derived from the Greek word "tekne", which means art or technique, and the word "logia", which means to have the skills or abilities to do a specific task.

There are many types of technologies, but they all seek to support the advancement and quality of life in society. But technology refers to how the body of knowledge that has been created, optimized, and used by humans can support the advancement and quality of life in society.

There are many types of technologies, and they are applied to all fields of human life including: communications, architecture, energy, transportation, physics, chemistry, computing, among others.

Digital technology is part of the information and communication technologies known as ICTs. It is based on high or low voltage electrical impulses, which form data and then process information accurately, with a minimum margin of error, and continuously. Some examples of this technology include in its digital form: TV, cable, photography, telephones, video games, smart appliances, shopping, money, medicine, printers, among others.

The Kit, supported by digital solutions, seeks to meet the needs of micro and small enterprises, in any sector or type of business, using the concept of digital transformation.

It is understood that **digital transformation** in a business refers to the application of digital technology in its strategies, processes, products, services, assets, and in general in its entire operation to improve its value



to customers, effectively manage risk and seek new opportunities to generate revenue and optimize its operations.

So, the digital kit seeks to support the digital transformation of a business and there are multiple **technologies** that can be used to achieve an effective transformation:

- Website and Internet presence, which includes the creation of the business's Web page and, with the support of other technologies and services, the generation of the business's visibility.
- Online commerce, which allows a business, with the support of an online store, to buy and sell products and/or services with the support of digital and logistical means for their exchange.
- Electronic marketing, which allows a business, among others, to use social networks, newsletters, audio, video, and others to achieve its promotion in the digital world.
- Customer management, which allows a business to digitize and optimize the management of business relationships with its customers.
- Supplier management, which allows a business to digitize and optimize the management of commercial relations with its suppliers.
- Business intelligence and analytics, which allows a business to leverage its data to improve the decision-making process.
- Virtual office services and tools, which allow a business to have all kinds of solutions that help it achieve the most efficient collaboration between employees, customers, and members of its ecosystem.
- Process management, which allows a business to digitize or automate its business processes throughout its operation.
- Electronic invoicing, which allows a business to digitize the flow of its invoice issuance.
- E-taxes, among other digital government procedures, allow a business to comply with its tax obligations.
- Secure communications, which allow a business to have security, agility, and ease in the connections between the devices of its employees, customers, and members of its ecosystem.



- Online security, also known as cybersecurity, provides SMEs with basic and advanced security for devices, both those of the business and those of its employees.
- Cloud computing, which allows a business to quickly access its digital platforms, new functionalities and updates, data storage, collaborative tools.
- Mobile platforms allow a business's employees, customers, and members of its ecosystem to work or work remotely, wherever, and whenever.
- Artificial intelligence, which enables a business to use its knowledge to make more accurate decisions about sales, marketing, product development and other strategic areas.
- Many more technologies include, among others: blockchain, augmented reality and virtual reality, Internet of Things (IoT).

To conclude, the expected **benefits** of using digital transformation are many, but among the main ones that were the purpose of creating this digital kit include:

- It allows a business to reduce its processes, because it automates the work by using digital media and converts them into data that can be analyzed, combined, and enhanced to improve its operation. Therefore, it allows them to transform their processes to be faster, more reliable and make decisions and actions that are more accurate.

It allows a business to be better organized, since all its departments store their information in digital systems, which reduces errors, simplifies tasks, and leaves a history of all transactions.

- It allows a business to ensure that all its employees have easy and secure access to all information, which optimizes its operations.
- It allows companies to increase customer satisfaction by providing faster, more personalized responses, improving the user experience, among others.
- It allows a business to collect and analyze its data to convert it into useful information that generates more revenue by consolidating operations in centralized repositories, having the ability to analyze and translate their data into information that allows better decision making.



- It allows a business to foster collaboration and improve communication between all members of its ecosystem, avoiding communication errors, slowness, redundancy, loss and achieving a more effective exchange.
- Other benefits include Increasing operational agility, avoiding human error, fostering a culture of excellence, collaboration, and quality in the business, increasing operational efficiency and in general, enabling more certain future growth.

Module 2: Digital Presence

To achieve the transformation of a business, it is important to have a presence in digital media. Digital **presence** refers to the ways in which a brand, person or business manifests itself in any digital media, including the Internet.

Today, whoever does not have a presence in digital media, to disseminate their products, services, values and above all their brand, can hardly compete in the market.

It is important to clarify two concepts. The first is that of a business's **brand**, which refers to everything that identifies a business and is much more than a name, a slogan, or the visual identity of the business, including its products or services, colors, values, price/quality ratio, among others.

The second important concept is **digital communication**. Digital communication refers to the exchange of information and/or knowledge using digital tools. We cannot have an effective digital presence without having a digital communication strategy. An outdated or unresponsive digital presence can be negative for a business's image. For example: An outdated website or lack of interaction in social networks damage the image of the business. Social networks and the Web site should be complementary tools for a business. The networks allow reaching a large audience while a website itself increases the public's trust in the business.

The **advantages** of a digital presence are many:

- Allows you to better position your business in markets that are not necessarily accessible through physical presence.



- It allows access to new market segments including new generations of consumers.
- Allows for better interaction with customers and business opportunities that are not accessible through traditional media.
- It has a lower cost than many physical presence options.
- There are ways to keep controls and indicators that are very useful to get feedback on a business's operations.
- There is a diversity of channels to improve interaction with customers and business opportunities.
- It allows us to provide 24-hour service throughout the year to customers and opportunities.
- There are various customer feedback elements through comments, ratings and others including even the amount of traffic and other indicators that help to see operational problems, but also opportunities for improvement or new business.

There are a wide variety of **options** for a business's digital presence, among others:

- The Web site is one of the main ones, they are pages on the Internet that have a description of the business, its products and services and any information that identifies and supports the brand and its values.
- Online trading sites, if not on the companies' website
- Blogs or online blogs are used to publicize issues and news through periodic publications.
- Social networks are also very useful to maintain constant communication with customers and opportunities (LinkedIn, Instagram, Facebook, Twitter, etc.).
- Blogs or online blogs, but through videos to publicize issues, news through periodic publications (YouTube, TikTok, for example).
- Digital ads on search engines and other media and social networks (social ads, Google ads, Bing ads, social media ads, for example)
- "Customer reviews (Google, Yelp, etc.)
- Photos and images (Google Images, Pinterest, for example).
- Offices or store locations (Google Maps, for example)



- Directory listings of any kind provide the opportunity for new users to reach the Web site and contain a brief description of the products and services and the location of the business.
- Podcasts that are like a series of series of episodes recorded in audio and broadcasted online on business-related topics (interviews, webinars, for example).
- News online.
- "Chatbots" or conversational bots, artificial intelligence tools that allow a business to immediately answer questions and comments from its customers.
- Search engine results" strategies (basic SEO) that allow a site to appear among the first 10 options on the pages of Google, Bing, Yahoo!, for example, or any other search engine.
- Videos, Games, virtual or augmented reality to promote your brand.
- Decentralized social networks are blockchain-based platforms that enable the exchange of information, as well as publishing and distributing content from a business to its customers (Mastodont, for example).
- Infographics, which are a visual representation of information with elements such as images, texts, graphics, and others that allow communicating a message immediately.
- Apps (mobile applications) of your business
- Partnerships with "influencers", or people who stand out in a social network or other digital media with large numbers of followers and who can support a business in providing opinions on issues, products and/or services.

Achieving an effective and strong digital presence for a business is something that requires several **actions**:

- Have a clear and defined strategy of how digital communication will be managed and used, objectives, value proposition, in which media, with which segments, metrics and with responsible parties, dates and costs.
- To have a good Web site as a letter of introduction, with good design, fast, accessible with different devices, with useful information,



allowing large amounts of traffic, functional, ergonomic, secure, easy to navigate, allowing communication with visitors, making sales, receiving quick feedback and with metrics.

- Have clear procedures, protocols, and people in charge of supporting the administration of all channels to avoid delays and errors that are very negative for the image with customers.
- Use online marketing management tools, if possible, to consolidate and track multiple channels.
- Optimize the website and make it friendly for the main search engines to achieve good positioning.
- Review and track metrics to take concrete action on problems and opportunities more effectively.
- To have a unified and standard image in all channels used to reinforce brand positioning.

Finally, it is important to emphasize that the digital presence of a business **must also be supported by a physical presence with a unified brand strategy to achieve the expected impact and create traffic between the two that allows an increase in customers and sales.** Although the physical presence is limited to the nearby space, it serves to support the brand strategy and it is recommended to participate in events such as: conferences, fairs, kiosks, physical stores, and branches, when possible, among others.

Module 3: Online commerce

Online commerce or electronic commerce (e-commerce) refers to the buying, selling, marketing and distribution of products and/or services through digital media, mainly the Internet.

The most popular **types of online commerce** are the following:

-Business-to-Consumer (B2C): refers to companies that sell to individual consumers.

Business-to-Business (also known as B2B): refers to business-to-business sales.



-Business-to-Government (B2G): refers to companies that sell to governments or government entities. There is also a Business-to-Business option that allows companies to conduct their government business online, and information can be accessed at any time.

- Consumer-to-Government (known as C2G, Consumer-to-Government) refers to consumers selling to governments or government entities. There is also a Government-to-Consumer option, which allows consumers to conduct their government business online, and information can be accessed at any time.

-Consumer-to-Consumer (C2C): these are platforms on which consumers buy and sell from each other through Web sites that are created by companies that connect consumers.

-Consumer-to-Business (C2B): these are platforms where customers sell to businesses.

There are also **other types** of online commerce that are interesting to know:

- Mobile commerce or M-commerce: Online commerce transactions are carried out by mobile devices such as smartphones and tablets. Many companies opt for this form of commerce to facilitate browsing and purchasing, as these portable devices are in the hands of most consumers around the world, it is not surprising that they are growing steadily.
- Online commerce on social networks or S-commerce or social commerce: is online commerce based on a social network such as Twitter (Tcommerce), Facebook (Fcommerce) or YouTube, among others. They mainly help to market and promote companies, although many already have their own platforms to sell and have a great reach.
- Business-to-Employee (B2E): is online commerce that is centered between a business and its employees. The business usually offers special prices directly to its employees in its online store as an incentive to drive improved job performance.
- Botcommerce (Botcommerce or b-commerce): is online commerce that uses bots in the purchase process and as it is an artificial intelligence



conversational bot, it simulates a conversation with the customers offering automatic answers to them.

The **advantages** of e-commerce for companies include:

-Enables the expansion of a business's customer base by entering a global market

-Allows extended sales hours 24 hours a day, seven days a week, all year round.

-Creates a competitive advantage by streamlining sales processes.

-Reduces production, marketing, administration, and other costs.

-Improves the business's communication with customers.

- Improve, optimize, and control metrics, the effectiveness of advertising campaigns.

-It is a global trend that is growing rapidly.

-It streamlines the purchasing process for the customer, as it allows them to examine different options in just a few steps.

-It has low operating costs, since creating and maintaining an online commerce site is not as expensive as a physical site.

-Provides companies with direct access to their target customers.

- Special offers and customized product recommendations can be made based on different customer segments.

- Among others.

To build a good e-commerce **Web site**, there are several issues to keep in mind:

- It is necessary to have a Web site, since it will be like a digital showcase on the Internet that facilitates the transaction between the buyer and the seller.

- Keep in mind that customers use computers, cell phones, tablets, and other devices to visit websites, social media pages and other digital



channels. In other words, the site and/or tools must be usable on different devices and screen sizes.

- It is necessary to concentrate on the description of the products and services, since it is important for the customer, always considering the target audience and the customer's user experience. It is necessary to have a good "shopping cart" that allows us to show and place orders easily.
- The logistics management process must be considered to ensure on-time delivery of products and thus achieve maximum customer satisfaction.
- It is necessary to have accessible, comfortable, safe, and known means of payment for the customer.
- All kinds of procedures must be in place, including returns or complaints in the case of dissatisfied customers.
- It is necessary to have a good pricing strategy and to offer discounts and promotions constantly.
- It is good to have clear with a good market study what other options there are in the market and under what conditions.
- It is necessary to have a marketing strategy that allows the business to have a successful and productive digital presence.
- The target audience must be well defined to have customers who will eventually become loyal to the business.
- When you already have loyal customers, the use of cross-selling products and services is highly recommended.
- You must work very well on the flowchart of steps for the business's Web site so that they are easy to use and provide useful information when needed without unnecessary steps.
- It is important to have effective inventory control.
- Among others

Although many companies prefer to have their own online commerce sites, there are already many online commerce platforms on the market that facilitate the digital transformation of a business's sales to the digital world. These are software **platforms** or tools used for the creation of an online store. Some of the best known are Shopify, Magento, Woocommerce,



Opencart, Bigcommerce, Wix, Zyro, Whatsapp Business, Facebook Marketplace, for example.

Finally, despite the many advantages of online commerce, there are still **challenges** that must always be kept in mind:

- As it is a digital interaction with the customer it is sometimes difficult to communicate so other digital means of communication are recommended.
- As with any IT and communication technology you can have technical challenges that if out of control can have a negative impact on sales. Effective technical support and IT policies are key.
- Information security is another key challenge in maintaining customer trust. It is important to have security, privacy and any other policies that demonstrate transparency and assurance of customer information.
- Large-scale logistics is key and often beyond the business's control. It is necessary to look for effective allies who share the business's customer service policies.
- Electronic means of payment in some countries are also a challenge. It is important to have reliable and convenient partners for customers.

Even so, online commerce has grown significantly in recent years. It is now common for companies to have both a physical and an online channel as an additional sales channel that reaches customers around the world.

Module 4: Online Marketing

Online marketing or e-marketing (electronic marketing) is the application of digital technologies to support a business's marketing activity. It seeks to understand the needs of its customers to attract and retain them.

It uses innovation to develop, promote and make a business's products and services accessible through different digital channels.

Therefore, it is important to make an online marketing strategy to define the **strategies** to be used, based on:

- Have a Web site.



- Define digital presence channels.
- Drive traffic to the Web site and digital channels.
- Using the search engine optimization service.
- Echo the campaign on all selected digital channels
- Analyze the plan's results and impact metrics.
- Make decisions and necessary changes.

The **benefits** of making an online marketing plan are:

- Customer segments can be defined to provide them directly with the information they are interested in.
- Metrics are available with information that will provide feedback to the plan and make it increasingly effective.
- Large numbers of customers can be reached at a lower cost.
- Ongoing campaigns and offers can be made to provide value to customers quickly and easily.
- There are many options of digital channels to be used according to the customer segment.
- By knowing your customers better, you can identify consumption habits and offer them other products and services.
- Immediate feedback from customers.
- Among others.

The different **tools or channels** suggested for a basic business online marketing plan include:

- A Web site that has a good, simple, and attractive design, fast, with useful information, easy to navigate, easy to manage new changes, with an adequate interface and that enhances the business's brand.
- A good system to position the business's information on the Internet. On the one hand, SEO (Search Engine Optimization) or search engine optimization, which is organic or natural positioning. On the other hand, SEM (Search Engine Marketing) or search engine marketing, which includes those activities, generally paid, such as advertising strategies, positioning activities and techniques, interactive and direct marketing.



- Use of landing pages that allow customers to easily access information and share their contact information through a form for quotes, newsletters, offers or others.
- Advertising with allies that allow associating the business's brand with third parties to create new opportunities to promote its products and services. For example, paying other sites to place the business's advertising banners or collaborating with "influencers" to showcase products and services on their social networks.
- Mobile applications so that customers can access exclusive options and offers from their cell phones quickly and conveniently.
- Email marketing is the use of email to promote a product or service, maintain communication with a customer, and create interest and brand loyalty. It can include the use of periodic electronic newsletters to provide news, information and even tips and tidbits of information.
- Social networks to access communities of potential clients that allow interaction among their members and that have common interests (Facebook, Twitter, LinkedIn, among others).
- Blogs (online blogs) or Vlogs (video blogs),
- Podcasts
- Among others.

The use of **traditional marketing** and physical presence is important to combine with online marketing. This includes direct sales, participation in fairs and/or markets, TV, radio, print advertisements in magazines, books, newspapers, and other printed materials such as posters, flyers, or others.

Module 5: Online Security

Online security or e-security (electronic security) refers to the measures an individual or business takes to protect its digital assets, infrastructure, data, and information from being accessed by online criminals, or cybercriminals.

The **objective** of online security is to maintain the integrity, availability, privacy, and authenticity of our business's information.

This is a growing problem since recently digital media are being used more and more for everything, work, study, or shopping. It is essential to have



well-defined strategies to protect the information of our business and our customers, especially since we are making transactions for online purchases that carry banking, payment and other information that may be of interest to cybercriminals.

There are several **types of** classifying online security, but for the topic of online commerce the important thing is to have:

- Security to protect the network from access, use, integrity and security of data and information flowing through it. In this category, tools such as antivirus, firewalls, and virtual private networks (VPN) are required to guarantee secure access and prevent unauthorized persons or cybercriminals from accessing the network.
- Software Security refers to the applications and programs installed in the business's equipment so that they are not vulnerable to attacks that can be damaged or stolen. Here there are procedures and standards to ensure the integrity and proper functioning of the systems.
- Hardware security, which refers to equipment and devices. The tools to be used in this category also include firewalls or hardware firewalls and servers used to control network traffic, called proxy servers, and hardware security modules that encrypt everything within the systems.

There are many **types of attacks** in the digital world, and they are constantly evolving. However, by way of summary, the following types of cyber-attacks can be found:

- Viruses or codes that infect files on a device and must be executed to act. For this reason, it is important never to open emails or programs of unknown origin.
- Trojans are programs that open a door so that other programs can be introduced to cause damage.
- Spyware which are programs used to spy and steal information.
- Ransomware, which are programs that allow cybercriminals to hijack data and demand ransom for it. They usually request transactions in digital currencies to make them harder to locate.



- Phishing, which are techniques for impersonation with the purpose of stealing private and important data by criminals.
- Denial of Service (DOS) is a type of program used by cybercriminals to generate many requests to a server and when it is no longer able to handle them, it crashes. Its aim is to disable business websites.
- Among others.

Among the online security **mechanisms**, the following should be mentioned:

- Keep all office, home and mobile devices protected with the latest operating system and antivirus versions, as a minimum.
- Use complex passwords and do not share them as they are less likely to be breached.
- Increase training and regular campaigns on online security issues, cyber-attacks, and best practices to all employees, including customers and suppliers.
- Hire specialized professionals in the event of a cyber-attack.
- Make backup copies of all your information.
- Be careful when using free wireless networks.
- Use virtual private networks to enhance privacy.
- Beware of counterfeit sites that are fake versions of legitimate Web sites.
- Monitor for malicious alterations to Web sites to divert traffic to another Web site.
- Prevent the theft of customer data such as addresses and credit card information.
- Encrypt data to prove its authenticity and the real origin of the information.
- Look for seals that generate confidence with good ethical and security practices. For example, the SSL (Secure Sockets Layer) certificate, which appears on Web sites, known as "https" and has a green padlock before the address.
- Periodic vulnerability testing
- Avoid storing sensitive data such as credit card information (number, expiration date and security code).



- Use appropriate digital payment methods.
- Protect your browsers with advanced security features that are enabled in each browser.
- Use two-factor or two-step authentication to provide an additional level of account security.
- As the business's online operations increase, it is more important to use a data backup scheme.
- Among others.

The digital transformation of companies is something important and necessary today as it brings operational improvements, cost reduction and, in the case of online commerce, an increase in customers and revenues.

Due to the increase in cybercrime, it is very important to take the necessary measures to protect the information of the business, its employees, and customers.

Module 6: Complementary Topics

The **Micro and Small Enterprise (MSE)** aims to be an economic unit that creates, designs, produces, markets, and transforms goods to have products and services to offer in a community. Formally it can be a natural or legal person (business).

The management of an MSE is key to making good decisions that allow it to grow to be competitive, productive, and profitable.

The digital transformation of an MSE has several edges and seeks to complete its operation. An MSE is an ecosystem where there are many parts, activities, and issues to pay attention to. When an MSE is moving to its revised version to the digital world, it is important to take all these parts into account. Here are the main ones:

1. Customer management:

A **customer** is a person or group of people who receive products and services produced by a business. There are internal customers who are the employees who work in the business. An external customer does not work



in the business but has a relationship with the business's products or services and includes suppliers, creditors, the government, the community, and society in general.

Customer management includes a business's strategies and techniques for managing relationships with its customers, both potential and existing, to optimize customer service.

As part of the digital transformation of a business for customer management a **CRM**, Customer Relationship Management, is used and refers to the set of practices, business strategies and technologies aimed at enhancing the customer relationship with the business.

With a CRM system, a business can manage customer relationships including optimizing the associated processes, improve profitability and drive business growth.

Some of the best-known CRMs worldwide include: HubSpot, Salesforce, Zoho, Microsoft Dynamics 365, Oracle, to name a few.

2. Financial management:

The **financial management** of an MSE, through digital channels, has to do with all the processes related to receiving, using, and controlling the business's money.

In the area of digital transformation, it is very important for MSEs to have an automated accounting system that allows them to keep their records in an agile, transparent, and effective manner.

For the **payment** issue, there are already available third-party commercial payment platforms, called "gateways" or payment gateways, from well-known international brands such as Visa, MasterCard, Paypal, among others, which are responsible for managing and providing payment services, while protecting the information of your customers' credit cards and other confidential data through cryptography.

They can authenticate customers connecting to make a transaction providing security to the transactions and allow to handle payments by



checking limits before the approval of the purchase to the financial entity that will make the corresponding payment.

Digital payment methods are technologies that allow the exchange of information and money to digital media with appropriate security.

There is now a variety of local electronic payment methods that facilitate the financial management of payments in a business's digital channels, such as: credit payment applications, credit cards, debit cards, mobile payment, check, payment by QR code, wallets and digital transfers, cryptocurrencies, for example.

A final issue is the importance of keeping a computerized **accounting system**. An MSE handles a lot of accounting information, which takes a lot of time away from other activities. In addition, it is important for tax issues.

You can also count on more comprehensive platforms such as SCM or ERP, but there are also tools to manage accounting even in the cloud, which reduces its cost.

3. Fiscal issues:

Tax obligations have to do with the payment of taxes and other related taxes to the government to ensure that an MSE is operating in accordance with the law.

The payment of **digital taxes** is already a commonly used topic that allows these obligations to be fulfilled through, many times, regulated financial institutions that already provide the platform to carry out payments to government audit entities.

Another important issue is the **digital invoice**, which is the evolution of the traditional paper invoice, for digital media with the same legal validity. It has many advantages because it is generated, validated, issued, received, rejected, and stored electronically.

4. Supply chain management:

For an MSE, it is important to have defined its distribution, storage, and product location processes, to access and control them for better customer service.



The issues of inventory management, supplier management, production control, for example, are key, as well as being very clear about the profit margin, its rotation and mainly, which products or services are the most profitable.

For the topic of digital transformation of the supply chain, the so-called **SCM** (Supply Chain Management) software is used, which is a program specialized in improving and automating the supply, warehousing, and distribution of a business, thereby reducing the necessary stocks and delivery times.

They are an **ERP**, Enterprise Resource Planning, which is an integrated software package that takes care of the processes of the functional areas of the business.

There are several available in the market and they are key to making the operation of any business efficient and achieving the digital transformation objective of the area. For example, SAP Business One, for example.

5. Human Resources Management:

For an MSE, as for any business, it is very important to manage its personnel. The areas to cover for **human resources** management are recruitment and selection of personnel, personnel performance evaluation, platforms for distance learning, personnel administration, reports with statistics and metrics, personnel calendars, personnel surveys, and Intranet with information on the business's human resources.

There is a wide variety of HR **software** accessible to MSEs, for example: ADP Workforce Now, Bitrix24, Factorial HR, Freshteam, Workday HCM, to name a few.

6. Handling of digitalized documentation:

A very important area in a digital transformation process, including MICRO AND SMALL ENTERPRISES, is the **documentation management** part. Nowadays, digitizing any type of document facilitates workflow within a business.



It refers to the process of converting the traditional means of documentation in a business into digital means.

The digitization of documentation in a business has several suggested **areas**: internal and external communication channels, product and service design, sales documentation, collections and payments, human resources, accounting, purchasing, among others.

The digitization of documentation has many **advantages** such as:

- Increases productivity, business volume and scalability.
- Improved customer satisfaction.
- Attracts and retains human talent.
- Allows to offer customized products and services.
- Adapts the business to market changes.
- Simplify and streamline operations.
- Saves costs.
- Improved security and transparency
- Allows remote work.

There are many **tools** for documentation digitization such as: Exact Synergy, Factorial, Adocum, Docuware, among others.

7. Communication management, collaboration, and others:

A very important issue for MSEs is the management of **communication and collaboration** with their employees, customers, and its ecosystem. Most digital tools have a free version, but if paid options are required, most do not require a large investment.

Here are some digital **tools** for communication, collaboration, and others:

- **Tools for sending online newsletters**: include some such as MailChimp, which has a free version and allows you to send mass mailings with templates.
- **Social media management tools**: One of the best platforms available for social media management is Hootsuite, which allows you to manage all your profiles in one place.
- **Blogging tools**: One of the best tools for creating a blog, or Web site is WordPress, although there are many others.



- **Design tools:** A tool that allows you to create designs in a very fast, simple, and easy way is Canva. You can create logos, banners, posts or e-mails, posters, infographics, etc.
- **Online marketing metrics tools:** Google Analytics is one of the best tools to view online marketing metrics and see the effectiveness of online presence and campaigns.
- **Cloud storage tools:** they are a good option for MSEs because of their cost, their contribution to the online security of their operations, making backups of their information, as well as for coordinating and working remotely or collaboratively. Google's Gsuite has Google Drive, but there are other Dropbox, iCloud, Microsoft's One Drive and WeTransfer, for example.
- **Digital communication tools:** They allow an MSE to keep in direct contact with customers and its collaborators, chats such as WhatsApp are very popular, but there is also Facebook Messenger, Telegram, for example.
- **Tools for virtual meetings:** Zoom, Skype, Oovoo and StreamYard, for example, can record to upload their videos to Vlogs or YouTube and then create more valuable content for MSEs, without effort or cost.
- **Project control tools:** Slack, Sesame, Trello, for example, are useful for tracking tasks, responsible parties, and others.
- **Tools for collaborative work:** that allow teams to work on files simultaneously online such as Google Docs (text documents), Google Sheets (spreadsheet) and Google Slides (presentations), for example. In addition, there are others that allow collective creative work such as MindNote (for mapping ideas) and MindMeiset (for collective mind maps), for example.



Module 7: Closing

Thank you very much for using the International Telecommunication Union's Digital Transformation Guide for MSEs (Micro and Small Enterprises).

For more information on mentoring, resources, online stores or other questions, please consult our website: <https://www.itu.int/en/ITU-D/Regional-Presence/Americas/Pages/ACTVTS/DTK/DTK-AMS.aspx>.

Acknowledgments

This DIGITAL KIT was developed by the Central America Area Office of the Americas Regional Office of the International Telecommunication Union in close collaboration with the regional and global team of the Thematic Priority of Digital Inclusion of the Telecommunication Development Sector (BDT) and with the Economic Development Committees of the United Nations System of the region. It was prepared by ITU expert María Zaghi, under the coordination of Miguel Ángel Alcaine Area Representative and Carlos Lugo Silva, ITU Regional Lead for Capacity Development.

Disclaimer of liability

The designations employed and the presentation of the material in this publication do not imply the expression of any opinion whatsoever on the part of ITU concerning the legal status of any country, territory, city, or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

The mention of specific companies or of certain manufacturers' products does not imply that they are endorsed or recommended by ITU in preference to others of a similar nature that are not mentioned.

ITU has taken all reasonable precautions to verify the information contained in this publication. However, the published material is being distributed without a warranty of any kind, either expressed or implied. The responsibility for the interpretation and use of the material rests with the reader. The opinions, findings and conclusions expressed in this publication do not necessarily reflect the views of ITU or its members.